

Methodology for Creating a FairShares Lab

A short report for the FairShares Labs for Social and Blue Innovation project co-authored by:

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Prolog

Welcome to the first intellectual output (IO1) of the Erasmus+ project *FairShares Labs for Social and Blue Innovation Project* (Project 2016-1-DE02-KA204-003397). IO1 has been prepared by project partners to describe their methodology for creating FairShares Labs. Work started in Erfurt, Germany (7-9 December 2016) and has been discussed in three further transnational meetings in Sheffield (26-28 June 2017), Berlin (27-28 August 2017) and Osijek (20-22 Feb 2018). In this prologue, we set out the purpose of IO1.

This document provides any person involved in the creation and development of a FairShares Lab (partners, coordinators, trainers and advisers) with an overview of the methodology for creating their lab. This includes an account of the FairShares Model itself as well as processes for setting up, recruiting people to and marketing a FairShares Lab, and supporting lab participants as they incubate new FairShares enterprises and contribute to building an ecosystem for FairShares.

Section 1 provides background information and an overview of the methodology. Section 2 provides an overview of five elements of a FairShares Lab. Three elements come from the FairShares Model of social enterprise development (created by FairShares Association Ltd) - *values and principles; key questions and; legal choices*. The other two elements are *social* and *technical* support systems selected by the partners for this project. Social support is provided through learning and development methods (elaborated further in Section 3). These generate ideas, improve the effectiveness of team work and enable stakeholders to make decisions together. In Section 4, we examine the process of establishing a lab, inviting people to it, running activities, selecting projects, producing prototypes of goods and services, planning and incorporating (social) enterprises. In Section 5, we consider the marketing of FairShares Labs, who they are for, what needs they serve, what messages should be communicated to target groups (and future lab organisers).

This overview is available in English, German, Dutch, Hungarian and Croatian.

Roger Schmidtchen, VSBI, Germany (Project Lead), 6th March 2018

1. Introduction

1.1 Background to the FairShares Labs Project

The *European FairShares Labs for Social and Blue Innovation* (FairShares Labs) project seeks to develop novel solutions to economic and environmental challenges, and to assist the reform of welfare systems and job markets. Traditional welfare and social services have not yet adjusted to the global rise of cooperative social entrepreneurship (CSE) that has evolved as a response to neo-liberalism in the 1990s and austerity policies in the last decade. Moreover, socio-structural changes brought about by the widespread use of the internet make it imperative to develop new forms of democratic social enterprise to promote participation and sustainability.¹ The FairShares Labs project brings together four bodies of knowledge and practice to develop new pedagogies and an ecosystem for entrepreneurial learning and enterprise creation:

- Social enterprise
- Blue economics
- Living Labs
- The FairShares Model

Social enterprise - in the context of this project - is a term that describes four approaches to social enterprise development recognised by a world leading research community.² Each approach combines elements of past social and economic thinking to create new hybrid enterprise forms that foster improvements to socio-economic outcomes. The four approaches are:

- 1) Cooperative and mutual enterprises
- 2) Charitable trading for public and community benefit
- 3) Socially responsible businesses that prioritise social and environmental goals
- 4) Public service social enterprises working with, or formed by, state institutions

The essence of the **blue economy**³ is promoting entrepreneurship that eliminates waste and the additional costs of waste management. Günter Pauli, who founded the concept, focused on using knowledge of natural systems to improve the production and consumption of materials by firms. In natural ecosystems there is no waste. Pauli believed that the application of design principles based on knowledge of nature would reduce costs and improve the way firms address social needs.

Living Labs are part of a global movement of networks that engage in enterprise development through innovative user-centric learning processes to co-create goods and

¹ See <http://www.un.org/sustainabledevelopment/sustainable-development-goals/> for more information.

² See EMES International Research Network - <http://emes.net/>, adapted by Social Enterprise International Ltd.

³ Pauli, G. (2010) 'The Blue Economy', *Resurgence*, Issue 263, November/December.

services for local communities.⁴ Citizen involvement is central to the innovation process combined with openness to using new ICT solutions to build creative capacities and transform local cultures. In our project, the Living Lab will be a place to build relationships between citizens and social entrepreneurs to design enterprises that harness their commitment. Five concepts feature strongly in Living Labs: co-creation; multi-method learning; multi-stakeholder organising; real-world settings, and; active user-involvement.

These concepts align strongly with the **FairShares Model** - a social enterprise incubation process developed by members of FairShares Association Ltd and championed by Social Enterprise International Ltd (SEi). FairShares frames four primary stakeholders in enterprise development (founders, labour, users and investors). SEi directors assisted in the formation of FairShares Association Ltd, which now maintains and develops support tools and legal models for social entrepreneurs, educators and consultants who want to apply the FairShares Model to practice. In 2017, Sheffield Business School⁵ seed funded the FairShares Institute for Cooperative Social Entrepreneurship to provide additional support in the form of FairShares intellectual property (IP) that FairShares Labs will pilot in 2018.⁶

In summary, this overview sets out how partners have developed the FairShares Model concept so that it aligns with social enterprise, blue economy and Living Labs. The result is a methodology for creating FairShares Labs that combine social and blue innovation. After pilot projects have taken place in 2018, we will refine this guidance and update learning materials.

1.2 Objectives

The methodology is designed to achieve the following project goals:

- 1) Develop and refine the process for creating, replicating and expanding FairShares Labs in support of social/blue projects and enterprises
- 2) Create a range of learning tools for FairShares hubs, labs, learning groups, coaches and trainers so they can practice cooperative social entrepreneurship.
- 3) Create an online FairShares Planner and E-Learning and Exchange Platform to facilitate the sharing and dissemination of knowledge.
- 4) Build a 'train-the-trainer' network to propagate a global network of FairShares Labs that apply the FairShares Model to social/blue development projects.

1.3 Entrepreneurial Drivers (Our Assumptions)

1.3.1 Problem-based and Aspiration-based Entrepreneurship

FairShares Labs are places to form relationships between funders, investors and people with ideas for new products and services. We make the assumption that the Labs will cater for two types of entrepreneurial endeavour: those aimed at solving problems (problem-based) and those driven by a desire to create a better world (aspiration-based). The former group focuses on overcoming social problems for specific groups whilst the latter are driven to create a better quality of life for everyone (in which 'problems' may not be the focus of their thinking). For both groups, FairShares Labs are places to learn about inclusive approaches to ownership,

⁴ <http://www.openlivinglabs.eu/> has had 395 members in 9 years - currently 170 members in 20 EU states.

⁵ Part of Sheffield Hallam University, one of the largest modern universities in the UK.

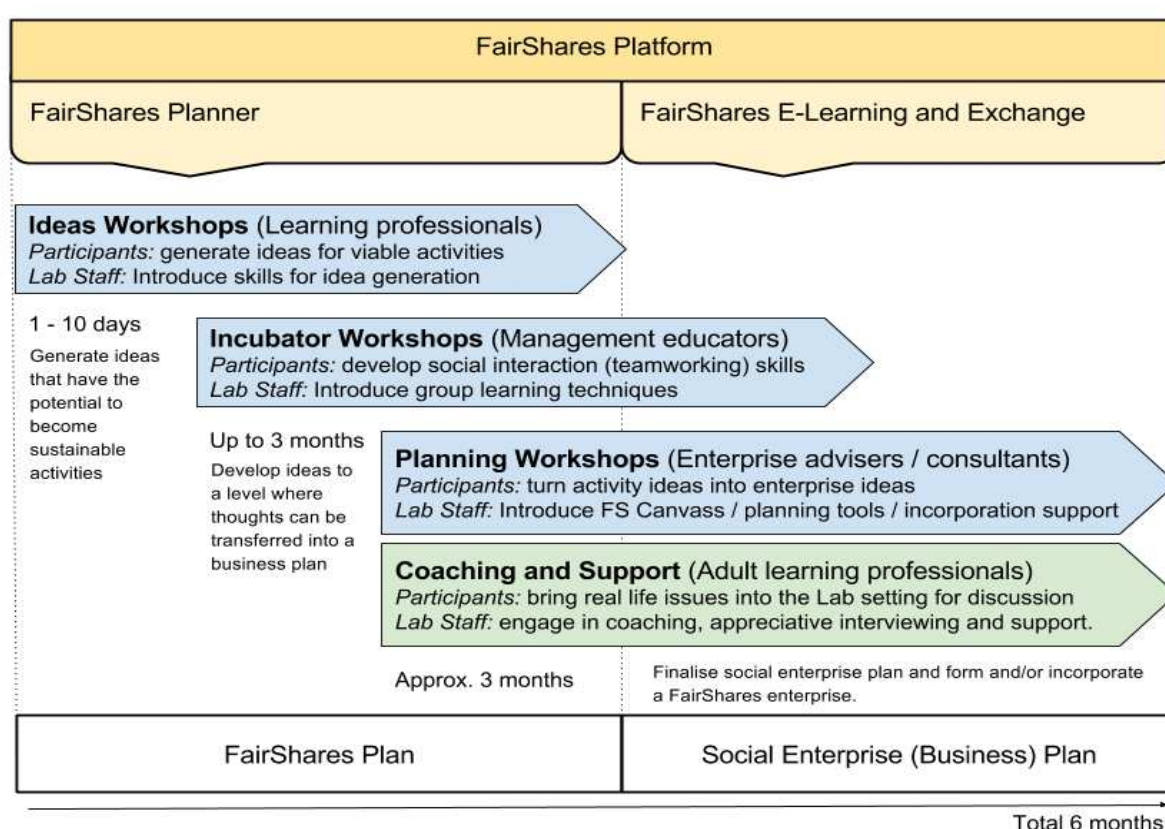
⁶ Available for use under the terms of International 4.0 Creative Commons Licences.

governance and management. We expect problem-based entrepreneurial endeavours will be more mission-focussed (to provide benefits for identified groups) while aspiration-driven endeavours will focus on co-creating enterprises through new approaches to democratic decision-making. FairShares Labs will accommodate both problem-solvers and better-world seekers, and offer resources they need to initiate and develop new projects.

1.4 Means

Every research informed activity is guided by a methodology. In this project, there are assumptions that guide idea creation, the incubation of project teams and the planning process for new enterprises. In Figure 1.1, we present our assumptions on the three-stage process needed to create multi-stakeholder enterprises in a FairShares Lab.

Figure 1.1 - FairShares learning and development overview



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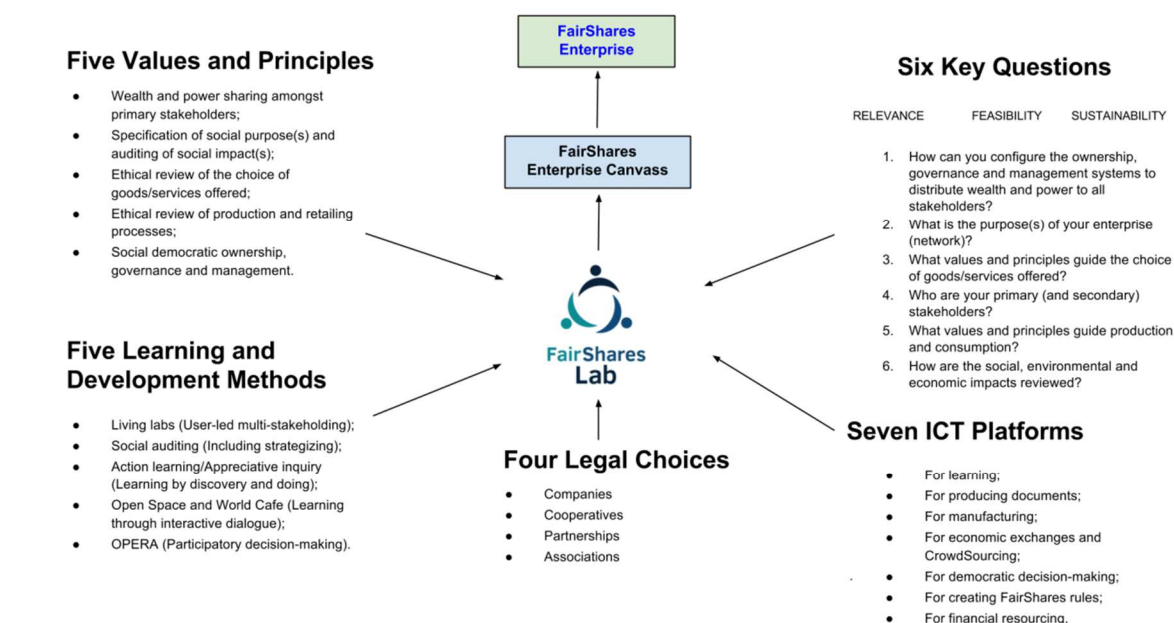
2. The Elements of a FairShares Lab

2.1 Models, processes and methods

In Figure 2.1, we offer an overview of the resources needed to create a FairShares Lab. In the sub-sections that follow, we take each part and discuss it in more detail. Each FairShares Lab is designed to support groups of people as they use the FairShares Platform to undertake e-

Learning activities, initiate the FairShares Planner, and work through questions on a [FairShares Canvass](#).

Figure 2.1 - Overview for developing a FairShares Lab



Rory Ridley-Duff, David Wren and FairShares Association Ltd

The first part of planning a FairShares Lab is to engage with FairShares values and principles. In V3.0 of FairShares, they have been reviewed against the concepts of a Living Lab and blue economy.

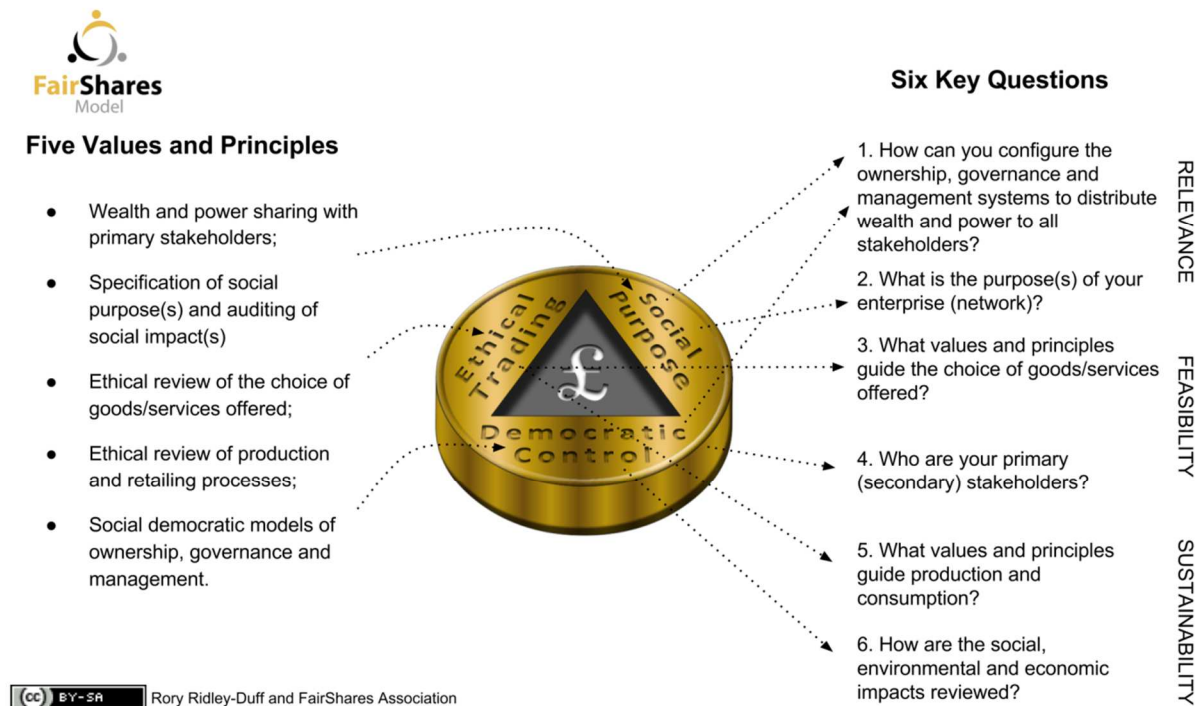
2.1.1 Five values and principles (model)

To build an enterprise, five values and principles [described in a document from the FairShares Association](#) need to be explored concretely through a series of questions.

- Wealth and power sharing amongst primary stakeholders
- Specification of social purpose(s) and auditing of social impact(s)
- Ethical review of the choice of goods/services offered
- Ethical review of production and retailing processes
- Social democratic models of ownership, governance and management.

In Figure 2.2, we set out how values are linked to key questions. The FairShares Planner guides members through answering a series of questions. For example, one of the questions in the FairShares Planner is “How does your idea create opportunities to share wealth and power?” This links ‘social purpose’ (your idea) to ‘distributing wealth and power’ (key question). Your answer might be to form a cooperative business so that power is shared more equally and surpluses are distributed on the basis of active participation, not financial contribution.

Figure 2.2 - A model, process and method driven by values and principles



2.1.2 Six key questions (process)

Members of a FairShares enterprise need to answer six key questions to produce (and later update) their FairShares Plan. These questions are described more fully in a [document available from the FairShares Association](#).

The six questions cover three important aspects of enterprise creation:

- **Relevance** - the enterprise's purpose and the rationale for its existence;
- **Feasibility** - the viability of the proposed systems for achieving the stated purposes;
- **Sustainability** - how systems make an ongoing contribution to sustainable development.

The first two questions examine the relevance of the enterprise to its stakeholders.

- How can you configure the ownership, governance and management systems to distribute wealth and power to all primary stakeholders?
- What are the purposes of your enterprise (network)?

The next two questions seek clarity on the feasibility of organising the enterprise

- What values and principles guide the choice of goods/services offered?
- Who are your primary (and secondary) stakeholders?

The final two questions examine how to achieve sustainability.

- What values and principles guide production and consumption?
- How are the social, environmental and economic impacts reviewed?

Answering the key questions

Knowing what questions need answering is not the same as knowing who is best positioned to answer each question. For example, questions about relevance (and social purposes) are best addressed by founder members in collaboration with potential product/services users. Users are particularly well placed to consider which products/services they would use, and the ethical, social and environmental impacts from their use. However, once we consider questions regarding feasibility, other groups are better placed. Providers of labour (suppliers, producers, employees) are better positioned to answer questions about production processes and their contribution to the social goals of the enterprise. Providers of finance capital may be better able to work out the feasibility of the financial plans and underlying economic assumptions.

Figure 2.3 - Who can answer the key questions?

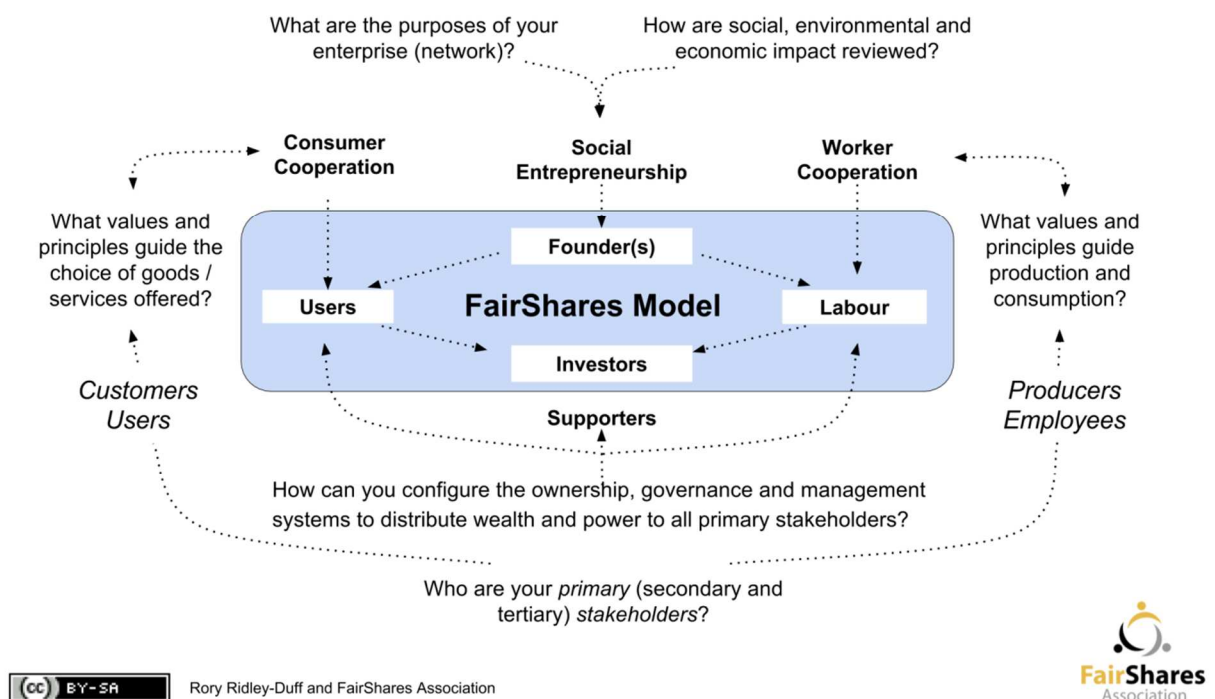


Figure 2.3 summarises how a successful implementation of the FairShares Model provides each stakeholder with a concrete role in reviewing the answers to specific questions they are well placed to answer.

The [FairShares Canvass](#) defines sub-questions that break down each of the key questions into manageable discussion topics.

2.1.3 Five learning and development methods

In the context of a FairShares Lab, these learning/development methods are essential management skills that will elicit answers to the six key questions. Answering these questions

in a way that is accountable, inclusive and responsive to stakeholder opinions is not straightforward so we set out five learning and development methods that have been used successfully by partners to build participatory democracy in workplaces and community development projects. The five learning/development methods each have a different role to play in building local democracy (based on accountability to the governed) and are described more fully in a [document available from the FairShares Association](#).

They cover:

- Living Labs (User-led multi-stakeholding)
- Social auditing (Inclusive strategizing)
- Action Learning/Appreciative Inquiry (Learning by discovery and doing)
- Open Space and World Café (Learning through interactive dialogue)
- OPERA (Participatory decision-making)

For example, appreciative inquiry enables people to work in pairs to clarify their learning whilst action learning groups enables individuals to bring an issue or problem to a larger group and be questioned on how to develop a response. We particularly like OPERA (a collaborative decision-making process) in combination with Open Space or World Café because it facilitates direct democracy in medium-sized groups. Once stakeholders have used these techniques to clarify the relevance, feasibility and sustainability of a potential enterprise, they can think about legal frameworks. In the next section, the impact of four legal options (companies, co-operatives, partnerships and associations) are considered.

2.1.4 Four legal identities

As answers to key questions are clarified, enterprise founders can start to think about four legal options for constituting [FairShares Enterprises](#). These options are described in [a document available from the FairShares Association](#) that provides advice on whether to incorporate as a company, cooperative, partnership or association. Each country context will influence the ease with which each legal option can be implemented so a goal of FairShares Labs is to gather information on applying the model and updating guidance. Each legal option defines how labour and user members are enfranchised when they make a '[qualifying contribution](#)'. Once founder members describe what they want to create, they can draft rules using a [FairShares Rules Generator](#).

2.1.5 Seven ICT platforms (method)

Lastly, we consider seven ICT technologies that can assist with the development of both a FairShares Lab and enterprise. [A document from the FairShares Association](#) sets out seven ICT platforms that can help with social enterprise (business) planning and support:

- A platform for learning
- A platform for producing documents
- A platform for manufacturing
- A platform for economic exchanges and crowdsourcing
- A platform for democratic decision-making
- A platform for creating FairShares rules
- A platform for financial resourcing

Each lab organiser can assemble ICT platforms to support the enterprises in their lab, or direct lab participants to ICT platforms they can use. For example, a lab organiser might combine Moodle for learning with LibreOffice for documents and Loomio.org for decision-making because they are all open source products, free at the point to anyone with a computer, laptop, tablet or smart phone.

In this section, we have considered the values and principles, key questions, learning and development methods, legal identities and ICT platforms that a FairShares Lab organiser can consider. These help lab members answer questions about their new FairShares enterprise. Taken together, they offer a suite of co-production methods for social and blue innovation.

3. Preparation of the Learning Materials and Platform

In this section, we briefly examine a three-stage learning process and discuss the development of learning materials for real and virtual FairShares Labs.

3.1 Approach: Exchange Platform + Workshops + (online) Coaching

The favoured learning method in FairShares Labs is blended-learning delivered through a non-formal collaborative approach that empowers rather than assesses. Facilitators assist by adapting learning methods to the context of the workshop. Learning content will be made available through the FairShares Platform. Figure 1.1 provided an overview of FairShares Lab workshops. We now consider them in more detail.

3.1.1 Curriculum for FairShares enterprise members

The curriculum is divided in three sub-curricula: 1) idea workshops; 2) incubator workshops and 3) planning workshops. Each workshop helps participants to prepare a FairShares Plan (using the FairShares Planner), then undertake activities to hone ideas and build confidence in pitching the enterprise to potential members and/or community investors using a [FairShares Canvass](#).

The **Ideas Workshop** is the first stage. Its role is to generate relevant ideas that have the potential to become sustainable activities and/or enterprises. Potential and interested stakeholders from local neighbourhoods (or online communities) are invited to a creative workshop that uses the learning and development methods to explore their expertise and interests. The objective is to identify potential innovations/ideas that can be added to a FairShares Planner, where each stakeholder can comment and develop the idea.

Incubator Workshops are the second stage of a FairShares Lab. Ideas carried forward from Ideas Workshop are explored in more detail using the learning and development methods. New questions from the FairShares Planner are introduced (such as “How can member groups cooperate to create a supply chain?”). These questions are not just logistical, but go to the heart of the democratic decision-making systems and development methods that enable the sharing of power across stakeholder groups. During this second stage, lab staff provide support so that projects can develop and publish their FairShares Plan.

The last step in the FairShares Lab is **Planning Workshops** in which individuals and/or groups receive **coaching and support**. Working with business advisers, project participants use the E-Learning and Communication tools (and their chosen ICT platforms) to turn their FairShares Plan into a social enterprise (business) plan. This can be articulated using a [FairShares Canvass](#).

3.1.2 Interactive project development templates

Through the FairShares Planner, learners are guided through the entire development process using a flexible and adaptable script, coupled with sub-questions that help to answer the key questions. They have a way to develop a FairShares Plan that can be validated using checklists, supported by links to additional E-Learning materials, and with information on further options for mentoring and support. This template is structured to align with the curricula described above and the [FairShares Canvass](#).

3.1.3 Train-the-trainers tool for coaches and mentors

A Train-the-Trainer Programme will be accessible from the E-Learning and Exchange tool.

3.1.4 Curriculum for FairShares coaches

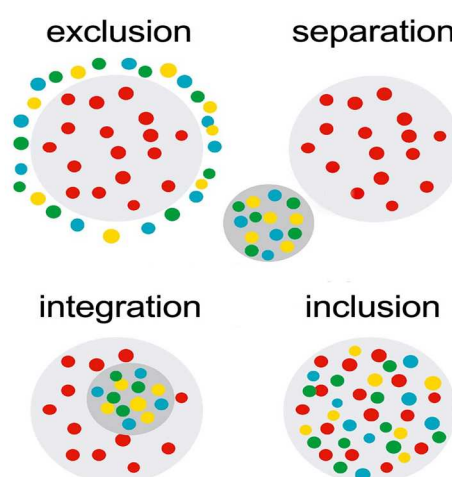
The methodology behind the “Training Course for Service Staff and Coaches/Mentors in FairShares Labs” will summarise the objectives, structures and requirements as well as the methodologies and curricula of the FairShares Planner to help adult learners. It will describe the appropriate training/learning methods and tools for the Train-The-Trainer training as well as a curriculum for training trainers and mentors. The curriculum will identify different learning steps and the amount of time needed, the content, the available and usable learning methods, control tasks and tools, equipment, staff, checklists, templates and guidelines for the coach/trainer.

4. Running Living Labs

4.1 Accessibility

The FairShares Model argues for methods that help to connect people with very different backgrounds and needs. The infographic (Figure 4.1) shows differences between exclusion, separation, integration and inclusion.

Figure 4.1 - Differentiating exclusion, separation, integration and inclusion



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FairShares Labs seek to be inclusive. All model FairShares constitutions contain Clause 5 (f) to commit organisation members to equality of opportunity and equitable treatment. People with special needs face multiple challenges so a FairShares Labs organiser can keep in mind the things that make their lab as accessible as possible (see Table 4.1).

Table 4.1 - Helping people with mobility, visual, hearing and learning issues

Limitation	Need
Mobility problems	<ul style="list-style-type: none"> • access without stairs/with elevator • even floor (e.g. no thresholds or carpets) • automatic and wide doors • adjustable furniture (e.g. height-adjustable desks) • adjustable hardware (headsets, movable screens, keyboards, remote controls) • adjustable software (connectable to wheelchair or special technical aids like eye control) • accessible toilets • enough space for moving with wheelchair, crutches etc.
Visual impairments	<ul style="list-style-type: none"> • high contrast environment • orientation systems • freeways (nothing standing in the way) • brailers and braille printers, screen reading software, large screens. • acoustic signals • anechoic rooms for better acoustic orientation • information material available in braille
Hearing impairments	<ul style="list-style-type: none"> • induction loops • sign language interpreters • visual signals • transparent doors or doors with windows • anechoic rooms for less hearing problems • information material available in sign language
Learning difficulties	<ul style="list-style-type: none"> • easy orientation (e.g. colour or symbol-based orientation system) • easy language

4.2 Generating ideas, teams, and formulating projects

The full IO1 report provides a more detailed overview of how to implement a FairShares Lab. In this overview, we briefly describe three techniques:

The “Start-up Weekend”

- **Day 1:** Everybody meets during the afternoon, gets information about the event, schedule, and rules. They generate as many ideas as possible before choosing which idea they would like to work on. Teams form around ideas and they work them up on Day 2.
- **Day 2:** Everybody works on their chosen idea in a team for as long as they want with all materials they need. Food is made available. Experts are around to support and counsel.
- **Day 3:** Teams get their ideas ready to present.⁷ Experts in presentation skills help them to articulate their ideas. Teams explain ideas to other participants and vote on them.

Design thinking task for two

“Design thinking” is a process for creating user oriented (human-centred) value propositions and business ideas. The full process can take weeks but the principles of the process are easy to understand and are aligned to work that project partners have already undertaken.

Search, offer, match

There is one other impressively simple method to get people together, generate ideas and develop projects. Invite people to a meeting with an impulse topic (e.g. “what needs to be done in our neighbourhood”, “I want fair trade”, “What is ‘good’ work?”) Start the event by explaining the rules: each person says their name, what they are searching for, what they can offer. When you recognise a match, start a direct conversation. There is no need to complete the cycle of everybody getting introduced to everybody or trying to remember everybody’s name. Get people to explore and recognise mutual interests, unexpected possibilities and form alliances.

4.3 Building the FairShares Lab

The process of establishing a FairShares Lab has five dimensions:

- **Space:** Every lab needs a co-working space where people can meet
- **Marketing:** Every lab needs to find ways to let people know about the lab
- **Learning activities:** Activities are organised to develop entrepreneurial competences
- **Participant activities:** Activities prepare people for their application to the lab
- **Stakeholder activities:** The fullest participation of all stakeholder groups is the goal.

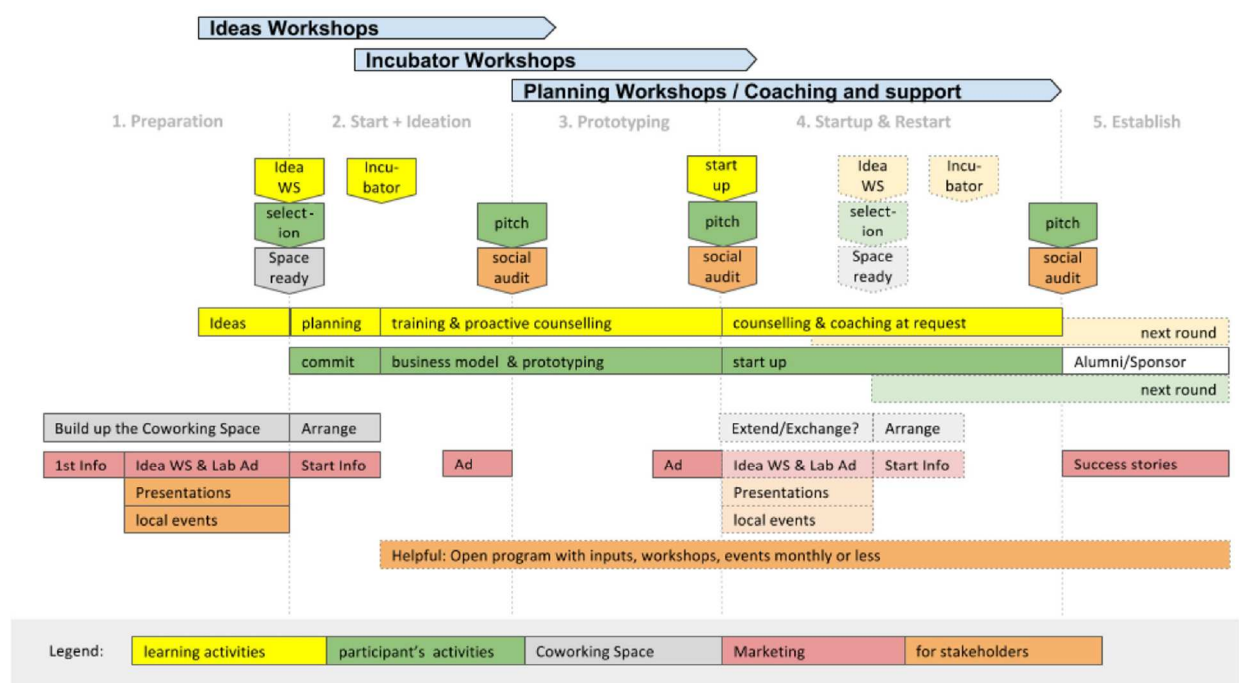
4.3.1 Five phases

Each lab is built and established step-by-step over five phases. However, the duration and scale of the activities may vary, adapted to local conditions. Figure 4.2 shows how the five dimensions and phases are linked to the idea, incubation and planning workshops described in Section 3.

⁷ The questions from the ‘Ideas Workshop’ part of the FairShares Canvass - those in the left-most column - may help with structuring a presentation.

1. **Preparation:** Find co-working space(s), participants, develop a learning program for peers, consultants and experts.
2. **Start and ideation:** Get participants creating ideas, work in the co-working space, build teams and get stakeholders involved.
3. **Prototyping:** Participants test and improve their ideas and work with stakeholders until there is a 'minimum viable product/service' available.
4. **Start-up and restart:** Refine ideas using a [FairShares Canvass](#) to prepare a social enterprise (business) plan. Set out value propositions, business models and operating arrangements. Start crowd-financing and/or talking to potential funders. Discuss which legal form would best support the long-term aims of the project.
5. **Establishing:** Write procedures for both expert and stakeholder groups (i.e. covering all phases of lab development). Clarify how the lab can continue to generate impact.

Figure 4.2 - FairShares Lab process overview



“Pitch” = a verbal or video explanation/advertisement of a FairShares Plan or social enterprise (business) plan to other lab participants, crowd-funding platform members or institutional funders to secure support and/or finance.

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5. Marketing the FairShares Labs

5.1 Marketing actions

Marketing is a complex process requiring strategic and tactical planning to set up a coordinated set of decisions and actions that position the brand in target markets. Marketing plans for a FairShares Labs focus on communicating the idea, approach and concept of the FairShares

Model. At the same time, it will promote and communicate the benefits of FairShares Labs in partner countries, and their scope for collaborative action across Europe. Marketing actions will be directed towards segmented and targeted groups based on key drivers at local, national and European level:

- a. **Business/political actors include:** i) potential funders; ii) advisers, and; iii) politicians.
- b. **FairShares stakeholders include:** i) founders; ii) labour; iii) users, and; iv) investors

Table 5.1 – Target groups, drivers and messages

Target group	Main drivers	Message to be communicated
1. Business/political actors		
Potential funders	<ul style="list-style-type: none"> ● Innovative platform ● Clear social purpose ● Sustainable approach ● Return on investment ● Clear rules 	It is a safe, socially desirable platform and way of doing business
Business advisers	<ul style="list-style-type: none"> ● Innovative platform ● Clear social purpose ● Sustainable approach ● Space for co-creation 	It is an opportunity to participate in the creation of new economic concepts and models in a European context.
Community leaders / politicians (local and regional)	<ul style="list-style-type: none"> ● Innovative platform ● Clear social purpose ● Solving local problems ● Adjustable to local needs, resources and development plans ● Creating jobs (low investment) ● Involving local stakeholders ● Sustainable approach ● Return on social investment ● High visibility ● Compact service/inclusive approach 	The FairShares Model works – it provides an efficient, multi-stakeholder, fair platform for creating jobs/solutions for local communities. It offers networking opportunities with others, especially at a European level.
2. FairShares stakeholders		
Founders	<ul style="list-style-type: none"> ● Innovative platform ● Clear social purpose ● Sustainable approach ● Return on investment ● Clear rules 	I can create and use my know-how. I can have local or European (international) contributors.
Labour	<ul style="list-style-type: none"> ● Sustainable approach ● Participation in decision making process ● A fair share of profit distributions/surpluses 	I can contribute, participate in management and be a co-owner. I can contribute at a local or European (international) level.

	<ul style="list-style-type: none"> ● Good working conditions 	
Users	<ul style="list-style-type: none"> ● Sustainable approach 	I can be a part of something valuable by simply buying products/services at a local or European level.
Investors	<ul style="list-style-type: none"> ● Sustainable approach 	I can make a change through meaningful social investment on a local or European level.

5.1.1 Key words

The key words and phrases below need to be communicated through the implementation period of the project so that the FairShares Lab becomes recognisable:

- FairShares Model
- FairShares Labs
- FairShares Platform
- Social impact
- Integrated approach
- Value-driven approach
- Social enterprise governance model
- Experiential learning
- Accountability
- Self-managed teams
- Participate in a safe investment

5.1.2 Messages

The main messages that need to be communicated to stakeholders, target market groups and to all other interested parties are as follow:

- **The FairShares Model works** – it provides an efficient, multi-stakeholder, fair platform for creating jobs
- **FairShares Lab know-how** - all-inclusive resource/support centre providing know-how, tools and guidance for applying the FairShares Model to enterprise development.
- **FairShares Platform innovation** – experiential learning platform providing know-how, opportunities and potential partners/investors for local, transnational and European cooperation.

5.2 Market segmentation

Market segmentation is a process of dividing a market of potential customers into smaller groups – segments – based on different characteristics (demographics, geographic, behavioural, interests, lifestyle etc.). It is used to better target marketing efforts and create a marketing mix aligned with user needs and desires. For this project, a multi-segment strategy will be used, focussing marketing efforts to target groups (see Table 5.1).

5.4.1 Marketing communication tools

To reach the targeted markets in the most effective way, various marketing tools will be used as an integrated package. Thus, the features and benefits of the FairShares Lab brand will be

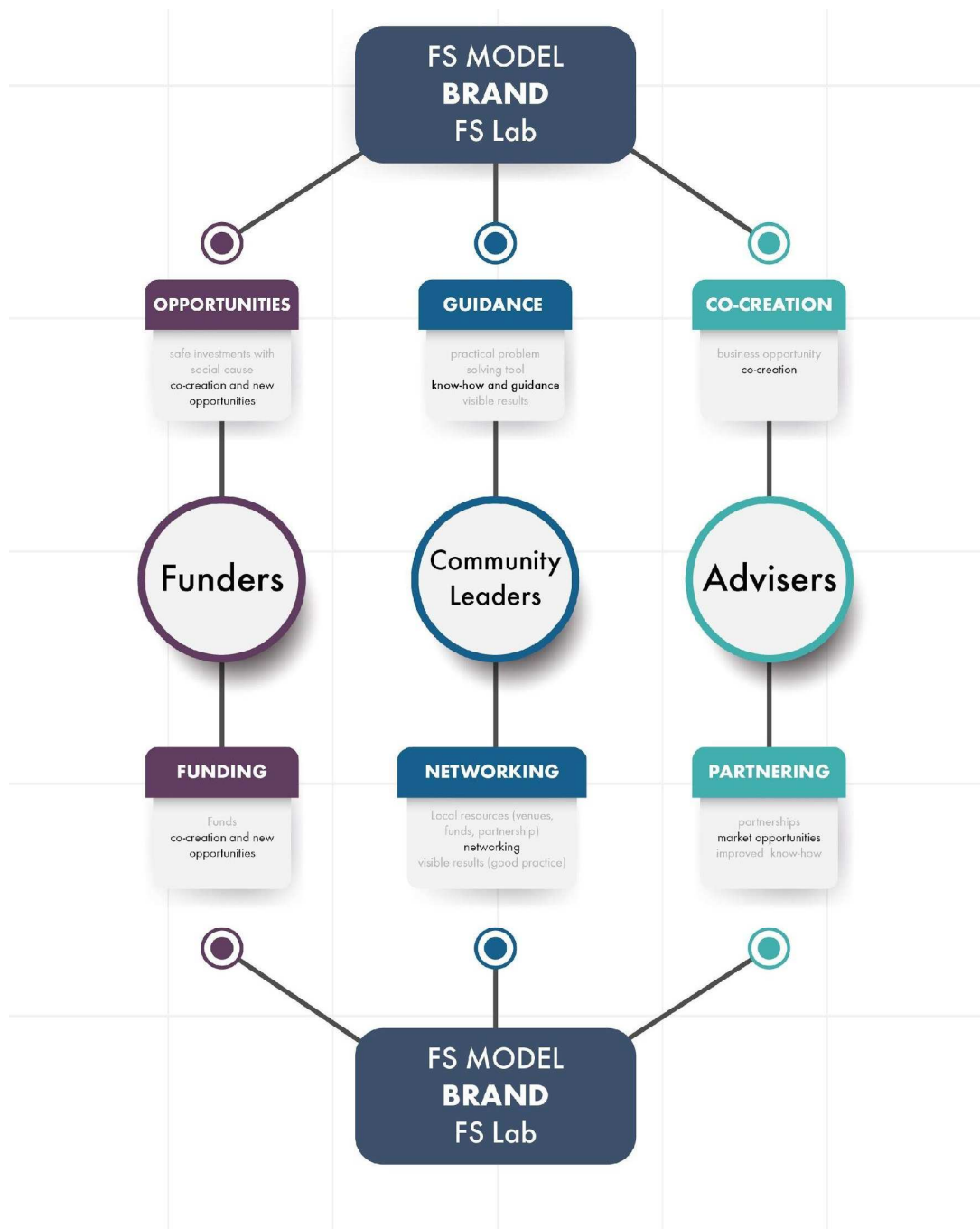
communicated in a coordinated way ensuring consistency in sending the message to each of the target groups. All five major marketing communication tools will be practised using an Integrated Marketing Communication (IMC) approach:

- **Advertising** – reaching a wider audience and building the brand image
- **Sales promotion** – incentives to enhance buyers to take an action (try or buy)
- **Personal selling** – building trust and relationships
- **Direct marketing** – personal approaches to building relationships
- **Public relations** – building a desirable image with a wider audience

A lab coordinator can use the above techniques with messages in Table 5.1. For example, personal communications to potential stakeholders can communicate the marketing message “you can contribute, participate in management and be a co-owner”. Adverts and public relations activities can communicate to potential funders and business advisers that:

- FairShares is a safe, socially desirable way of doing business
- FairShares is an opportunity to participate in creating new economic concepts
- The FairShares Model works – it is an efficient multi-stakeholder platform.

Figure 5.1 – Value chain and main drivers



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Annex - Checklist for starting a FairShares Lab

Action	Description	Check
<i>Preparing an inclusion strategy</i>		
Brief staff on inclusivity	Ensure staff understanding the different between integration and inclusion and agree an inclusion strategy for people with protected characteristics (gender, ethnicity, sexuality etc.)	<input type="checkbox"/>
Identify Infrastructure / social barriers	Use Table 4.1 to Identify any physical and nonphysical barriers to full inclusion and mitigate effects as far as possible.	<input type="checkbox"/>
Design family friendly working practices	Discuss how the Lab will support members' with parenting, child care and other caring responsibilities, and any facilities that enable flexible and remote working.	<input type="checkbox"/>
<i>Preparing a space</i>		
Find a suitable space	Identify a temporary or permanent co-working space with space, tables, chairs (enough for the number of teams and participants you want to receive), special rooms (e.g. workshops, storage), access to WiFi, electricity, a kitchen, lockable rooms or lockers, accessible printer, toilets, a training/meeting room, relaxation room, place for chatting and spending free time.	<input type="checkbox"/>
Prepare for meals and breaks	Ensure you have everything you need to cater/accommodate people so that no-one has to leave during an event.	<input type="checkbox"/>
Prepare and place adverts	Advertise to potential participants, to multipliers, to consultants and experts, to persons and organisations that might contribute to the sustainable establishment of the FairShares Lab. Prepare simple, descriptive, attractive and brief information media, explain entry terms, vision and ideas.	<input type="checkbox"/>
Invite consultants, support experts and coaches	Employ (sessional?) adult educators to facilitate early learning / ideation activities. Use contact networks to find consultants / experts / coaches willing to support lab participants.	<input type="checkbox"/>
<i>Start and ideation</i>		
Design learning activities	Design evening sessions or start-up weekends that use OPERA (or other inclusive democratic process) to generate viable ideas.	<input type="checkbox"/>
Facilitate team formation	Facilitate group work to develop ideas using Open Space and World Cafe workshops, and schedule time for groups to present initial ideas.	<input type="checkbox"/>

Record and screen ideas	Enrol on the FairShares Platform and develop promising ideas using the FairShares Planner. Publicise ideas, obtain stakeholder responses and prepare / evaluate FairShares Plans.	?
<i>Prototyping</i>		
Incubate / prototype ideas	Facilitate workshops in which participants test assumptions and improve their ideas with stakeholders until there is a 'minimum viable product/service' defined.	?
Prepare a FairShares Canvass	Get participants to refine their ideas and populate a FairShares Canvass. Prepare an implementation plan: set out value propositions, social enterprise (business) models and operating arrangements.	?
<i>Start and restart</i>		
Pre-start checks	Work with experts in law and tax to prepare for implementation. Establish the impact of starting to trade on key persons.	?
Obtain finance	Discuss financial options. Consider crowd-financing activities / pitching opportunities. Seek seed / bank funding options and opportunities.	?
Prepare for incorporation	Discuss / debate which legal form will support the social enterprise model that achieves the working practices / governance / social value creation desired.	?
<i>Establishing</i>		
Agree operational procedures	Get procedures, programme information, expert advisers and stakeholders relationships settled.	?
Social audit and reporting	Design your approach to social auditing (through a bespoke system or further use of the FairShares Planner)	?
Plan future relationship with host Lab	Clarify how the FairShares Lab can continue to support the enterprise and generate impact, and whether the Lab should have an equity holding in companies/cooperatives it has supported.	?