

User's guide

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I. Introduction – the concept of the training platform

The User's Guide has been prepared to facilitate users through the online training platform developed to support the implementation of ISO 26000 on Social Responsibility (SR) in SMEs. The User's Guide is directed towards the trainers, but small and medium enterprises (SME) consultants or university and vocational education and training (VET) lecturers may also find it useful.

The **general objective** of the e-platform is to improve the quality, efficiency and effectiveness of vocational education and training in Europe, improving global competitiveness of European corporate sector. The web based platform and training will enable the corporate management to continually assess and improve their performance towards sustainable development.

The main **direct target group** consists of managers and staff members in charge of SR and ISO 26000 in SMEs. They are supplied with practical and effective high quality training material, freely online available and based on actual needs and weaknesses detected, thus it makes available useful guidance and solutions for SMEs which want to improve their SR standard or even implement the ISO 26000. The e-learning platform addresses management staff having just an idea what is socially responsible behaviour in their business and/or have at least moderate if not strong drive to implement ISO 26000 concept. It intends to make ISO 26000 accessible to SMEs, in order to allow them to make an easier integration of CSR strategies within the overall company's strategy. As well as this, the e-tool is recommended to all the interested stakeholders, not only SMEs, but also to the universities and VET institutions, who can support the SMEs in the process, in order to provide them integrated and accessible didactic resources.

The training platform is hybrid in type including elements of training and elements of consultancy. The training material is a mix of "explaining" elements of ISO 26000 (for example the fundamental principles and the core subjects and issues) and "how to" tools – like how to review the existing SR effort, a number of questions for the SME to consider when elaborating an SR profile

(why do we want to focus on SR), how to map and engage with stakeholders, how to monitor and report on SR performance, etc.

The platform is based on the understanding that all organizations should review and understand their SR impacts on society and that stakeholders should be actively involved in reviewing and prioritizing the impacts. For any organization, the overall goal is to contribute to sustainable development, but the individual organization should consider its own impacts and stakeholders related to these impacts. Based on this knowledge, the company should define its own, specific objectives and set up actions to realize the objectives. ISO 26000 supports a **holistic approach**. This means that a given organization cannot pick and choose for example to focus only on one/few principles and subjects. But it should of course prioritize its efforts as all organizations have limited resources. For that reason the platform consists of 5 sections logically **following the decision making process**. The training concept anticipates that the User will go through the following steps:

Step 1. Reviewing the organizational, stakeholder and societal context

Step 2. Analysing and prioritising

Step 3. Agenda setting

Step 4. Implementing SR in the organisation

The first two steps are developed in detail regarding the principles, core subjects and integration issues, while step 3 and step 4 are just briefly explained.

The user can choose where to start if s/he has certain options and conditions in mind. This is done by filling questionnaires and checklists, recommending sources of information and also by conducting stakeholders' analysis and determining the spheres of influence of the enterprise.

The training platform includes introductory texts to read (handouts), supported by slide presentations, series of interactive learning activities – case studies, topics for discussion (exercises), check-lists for organization's self-assessment with KPIs and tests. The materials also contain the following:

- **Additional reading** – materials which give more or different or additional information on the subject in discussion;
- **References** – materials from which some texts, figures, etc. are quoted or retold;
- **Relevant links** – links where useful information (maybe not explicitly related to the subject) – additional examples, blogs where the topic is discussed, etc.

They are in a commonly used language (English, French and German) and are readily available.

Relevant glossary is also developed and made available.

II. Objectives of the training course

The training platform is aiming at developing knowledge, skills and competences how to implement the standard ISO 26000 on Social Responsibility - the main principles of SR, the core subjects and issues and their integration throughout the organization. The content of the platform is intended to provide simplified and practically oriented knowledge, ideas and techniques to contribute to the ISO standard realization in the companies.

The trainees should have relevant knowledge in Human Resource Management, basic knowledge in public administration procedures, accounting and scheduling, as well as good social and communication skills to help them easily relate with the different stakeholders - management, workers, trade unions, NGO's and local authorities.

Using the training platform will result in acquired:

Knowledge - The training will provide a conceptual and experiential grounding in the basic principles, core subjects and core issues of SR, as well as the internal and external aspects of the SR concept and management practices of successful implementation operations.

The trainees will become knowledgeable of:

- the **applicable/relevant** SR standard;
- the roles of the different stakeholders;
- the main instruments of SR;
- the implementation criteria (quality and quantity);
- the indicators to meet the criteria;
- the good practice of SR policies and procedures;
- the self-assessment methods;
- the development of indicators to monitor results from the implementation of SR procedures;
- the methods of prioritizing and assessment of workable options.

Skills -The trainees will be able:

- to identify and apply concepts, theories and management practices of successful implementation operations;
- to identify main SR topics and relevant indicators;
- to be able to assess the level of integration of the applicable/relevant SR standards into the company's SR policies and procedures;
- to be able to analyse and synthesize the collected information and observations;
- to identify gaps between standards and performance in relation to SR implementation and make recommendations on the basis of identified performance gaps;
- to set goals, define responsibilities and follow-up deadlines of implementation;

- to apply monitoring and follow-up process;
- to communicate effectively with the different stakeholders in a balanced manner.

Competencies - The trainees will be able:

- to understand the role of the organizations in applying effective SR policies;
- to recognize the relevant stakeholders for a particular organizational profile;
- to collect, analyse and assess information about employed CSR policies and procedures;
- to prepare clear, understandable and reasonable recommendations on the basis of identified performance gaps.

III. Adapting the training

This training platform has been designed for modification and adaptation to meet the needs and conditions of different organisations and enterprises. Considering that it was designed to be used either by the personnel of one enterprise or for training staff from different enterprises/organisations, the activities should be modified according to the needs of the specific audience.

In case all participants represent the same enterprise or branch, the training activity may constitute awareness-raising for top management (obtaining commitment to SR concept) or initial step in SR implementation or it could provide an impetus for generation of possible solutions for a particular enterprise. On the other hand, if participants come from different firms or organisations they will bring a wider variety of concerns to the training.

The training platform, as already explained, includes interactive elements and allows flexibility regarding the prioritization of contents. The SR topics could be represented to the SMEs in a way that suits them best as different entrance level is functionally possible.

Trainers can take advantage of the strong focus on the “business case” and also of the provision of know-how regarding the measurability of SR, as well as practical cases which are included, showing the clear benefits for SMEs.

The owners and the managers could be assisted in their plans to turn to socially responsible management and socially responsible investments. The research institutes, the universities and the NGOs should be prepared to teach them to develop strategies, plans for implementations and reporting instruments according to the principles of accountability, transparency, ethical behaviour, respect for stakeholders, respect for the rule of law, respect for international norms of behaviour, respect for human rights when the entrepreneurs will be ready and asking for them.

The specificity of the small and medium enterprises varies very much from sector to sector and from size to size (a family firm differs very much from a 50 and more personnel company).

Some advices and hints for specificity of training of companies from the textile, clothing, tourism and food-processing sectors are described below.

Textile and clothing – the apparel sector is actually the initiator for wide implementation of the corporate social responsibility concept because of the acute problems regarding the human and labour rights of the employees including those in the supply chains of the most famous world brands of sportswear, footwear and clothing. The labour in the factories producing textile and clothing is mostly manual, requiring low qualification and the size of the factories may vary from several workers to thousands. It is not unfamiliar to use child labour and bonded labour. The requirements for at least decent occupational health and safety are often neglected and the workers are working in inhuman working conditions. Practically all the aspects of SR behaviour are very relevant for the SMEs in this sector – the presence of all the principles, core subjects and integration issues should be checked and the respective parts of ISO 26000 assessed how to be implemented. Special attention should be paid to the accountancy, ethical behaviour, respect for the rule of law and respect of human rights principles as well as to labour practices, human rights, community involvement and development core issues. Companies should pay special attention to the understanding of the social responsibility of their organization, to the practices of SR which they should design and introduce and to regular reviewing and improving of their actions and practices related to SR.

Tourism – the SR problems of the tourism sector most often refer to the lack of clear strategic vision of the management on how to develop its personnel – recruit, retain, train, motivate, discipline and dismiss, as well as to the resource efficiency and environmental management. That is why the recommended options should be based on human resource development aspect and introducing a SR policy, including also motivation and the stimulation of the personnel, improving the communication within the company and with the community, and improving the quality of the provided services through better resource efficiency, improved satisfaction of staff and tourists.

Food-processing - in food-processing industry the introducing of SR should be based on management style concerning improvement in communication on all levels, an internal research on the needs of the employees, better motivation of the employees, written CR policy towards the suppliers and clients, optimization of transport expenditures, optimization of packaging and multiple use packaging, energy monitoring and use of RES, and optimization of water temperature and amount of water.

Differentiation of training based on the size of company - in case of small organizations – 5-20 employees, obviously there will be only one person responsible for human resource development (HRD) and/or environmental issues and this might be the owner who is often the senior managers; in case of bigger organizations – 20-250 employees, there might be specially appointed personal to deal with the HRD and environmental issues in the company – respectively the training and/or consultancy should include these persons and enough senior manager/owner to make sure that the managerial aspect of introducing SR in a company are properly understood and subsequently implemented.

IV. Adapting the training materials

The training material is organized to provide answers to the following questions, which allows to select specific topic to start with and organize the training individually, depending on the concrete needs and intentions. The questions include:

- What the principle/core subject/implementation issue is about?

Link to a word.doc file with more detailed information (about one page) on the topic in operational business terms and prescription to read the original text in the standard.

Links to other relevant information sources identified.

- How to assess the current status in the company?

Link to a checklist to self-assess the company's implementation of the respective principle/core subject/implementation issue

- What to do? What could be the options to be implemented to meet the standard and some guidance for action?

Link to a short list of concrete options for implementation regarding the respective principle/core subject/implementation issue

- How the successful companies implemented the respective principle/core subject/implementation issue?

Link to case studies, examples, discussion topics, video clips, etc.

- How to assess the options and select the appropriate ones?

Link to an assessment table to identify the workable options

- How to measure the performance of current operation and implemented options?

Link to a list of assessment criteria (key performance indicators) and how to monitor the operation based on the respective principle/core subject/implementation issue

- How to integrate the principle/core subject/implementation issue?

Link to a word.doc text file, to a list of options, case studies, list to existing tools, etc.

Suggestions for adaptation:

The life cycle approach could also be applied to create a common platform of understanding among the partners in a product chain. Further on, examples can be developed on how the life cycle approach can improve performance and business. At the same time, the trainers should have in mind that the chain of production might be much diversified, with many branches and rather complicated, which can compromise the idea of referring to the life cycle assessment concept.

The explanatory texts and the other didactic materials (slides presentations, case studies, topics for discussion and other) can be used as handouts to develop different types of training activities apart from the online training – seminars, short courses or a longer course over a period of time. The structure and content of the training activity will vary according to the background and needs of participants. For example, from the point of view of the participants, the primary objective may be one or more of the following:

- to understand why enterprises will benefit from the introduction of SR and who is to be involved;

- to understand what an effective SR operation is and how it relates to the performance improvement as a whole;
- to initialize the process of SR or ISO 26000 implementation, etc.

V. Adapting the training activity for different audience

The trainer could decide how to expand or skip some of the training materials depending on the preliminary knowledge of the audience.

Participants from different type of enterprises. When the trainees consist of staff from different enterprises, the primary goals may be to raise awareness and to generate commitment to SR:

- to convince them of the SR advantages;
- to give them tools for SR policy development;
- to give them the information and advice they need to convince others (for example, top management) in their enterprises of the SR importance.

It might be useful to divide trainees into groups not according the industrial sector or type of company, but otherwise – try to make a “mixture” from different branches. These groups can work together and some new ideas, which are unusual for the branch specialist, can be generated.

Participants from the same branch. The main purpose of conducting a training may be the same as in previous case (different types of companies). However, specific problems of the branch and possible solutions should be analysed in more detail.

VI. Evaluation of the training

For some of the topics short tests to evaluate the knowledge acquires by the trainees are developed. Final test on the whole content related to SR is elaborated aiming to provide direct feedback for the trainee on the level of understanding of the SR principles, core subjects and implementation issues and the way they have to be implemented in the enterprise.

Some longer-term evaluation aspects that are difficult to measure can also be considered. They are the following:

- Will the trainee undertake efforts to implement SR measures in the company and/or the workplace?
- Will the trainee convey enough information to excite co-workers?
- Will the training lead to a change in the behaviour or attitude in relation to SR?

To establish the long-term effect of the training follow-up and further inquiry is recommended.

VII. Instructions for the use of the case studies and best practices

Using case studies. Several real case studies are provided for every SR principle, core subject and issue and may be used in the training to illustrate, discuss, check the knowledge or practice some skills needed for the SR policy development.

Trainers may also develop their own case studies with local examples or the information provided by the participants. This should not be done without the consent of the participants concerned and should not include any information that participants consider sensitive or confidential. It may be useful to generalize or modify certain information to make the case study more relevant to other users of the platform.

In some situations, the case studies should be adapted to local circumstances and brought as close as possible to the practical experience and knowledge of the trainees.

The trainer/developer should decide how this case can be used in the training process – either as an illustration for a point or as a ground for discussion or as a material for checking the understanding of the students, etc.

Participant-based approach. Ideally, the training should be as close to the experience of the participants as possible. This will give them the best opportunity to understand the SR concepts and techniques. For this reason, the trainer could prefer not to use case studies – real or hypothetical, but to organize a small group work and discussion sessions of virtual attendance around the experience of the trainees or pre-selected topics for discussion. However, in a view of the time needed for feedback, it is recommended that this structure should be limited. To facilitate the trainers, lists of potential topics for discussion are elaborated for every SR principle, core subject and issue.

VIII. Advice for new lecturers: principles of learning

Make use of the self-motivation of adults. Adults bring a wealth of knowledge and experience into the training. They expect to obtain information and to develop skills that have immediate application to their work. They should participate in determining the content of their own learning. They need to be able to integrate new knowledge with existing knowledge to be able to use it. They want to develop specific competencies. They learn best when they are “doing”.

They can be encouraged by asking them to provide materials for case studies or by taking their concerns into account in the type and level of training.

Great attention should be paid to discussions between the trainer and the participants and between participants themselves in small groups.

Apply facilitation techniques: asking questions. Questions are most important in highlighting key points of the training material. Try to anticipate and identify key questions in advance. Develop a strategy for asking questions - this may depend on whether you want to promote brainstorming, consensus building, or a debate.

Move from simple to more complex questions. Avoid yes/no questions and ask open-ended questions. Questions can be used to encourage interaction among the participants. They can be used to change the speed and direction of the discussion, for example by moving from the concrete to the general or vice versa, or to summarise and close a discussion. Questions can be used to focus attention on the assumptions or ideas underlying the participants' comments, to explore alternatives, or to bring out the implications of an issue.

Make use of available audio/visual presentations and materials. Different cases and education films are available on the Internet, especially in YouTube.

IX. Trainer guide for Group Work

The use of group work is an essential part of most training courses and provides a good basis for trainee participation/ exchange of ideas and information. The exercises are intended to:

- enable participants to share their knowledge and experience with others;
- give participants an opportunity to apply information they have received from the lectures and to practice the critical skills in starting developing SR policy and options.

The simple hints on how to proceed through group work exercise include role plays, analysis, etc.

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