



## Piloting of new 'Operation Specialist for BCs' qualification Italy and Portugal Reports

*S4BC Innovative Skills For Benefit Companies  
Project n° 2021-1-IT01-KA220-VET-000034806*

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## Piloting of S4BC Training Course in Italy

### Participants Profiles

In Italy the course was piloted at the level of EQF 5. The Level 5 qualifications are at a level equivalent to intermediate higher education qualifications, such as diplomas of higher education, foundation and other degrees.

In the context of EQF learning outcomes, knowledge is described as theoretical and/or factual. Skills are described as cognitive (involving the use of logical, intuitive and creative thinking) and practical (involving manual dexterity and the use of methods, materials, tools

and instruments). Responsibility and autonomy are described as the ability of the learner to apply knowledge and skills autonomously and with responsibility (European Commission. “Descriptors defining levels in the European Qualifications Framework (EQF)”, <https://ec.europa.eu/ploteus/content/descriptors-page> (assessed October 26, 2020).

Based on EQF descriptors, the course for “Operational specialist for benefit companies” at EQF Level 5 has been defined as follows in terms of learning outcomes:

Knowledge	Skills	Responsibility and Autonomy
Comprehensive, specialised, factual and theoretical knowledge within a field of work or study and an awareness of the boundaries of that knowledge	A comprehensive range of cognitive and practical skills required to develop creative solutions to abstract problems	Exercise management and supervision in contexts of work or study activities where there is unpredictable change; review and develop performance of self and others

In line with this, the course was mainly addressed to business owners, managers, administrators, CEOs, consultants, HR managers, quality managers, impact managers, other interested business personnel, accountants, employment consultants, lawyers, other professionals.

In total we had 40 participants coming from 31 different companies and organizations. We must say that the number is higher than planned and we had lot of success in terms of recruitment of the participants.

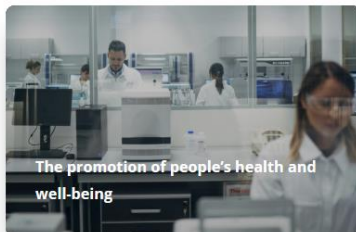
## Trainers

The trainers of the in-presence sessions of the course have been:

**Jacopo Gabriele Orlando**, PhD, Agricultural public affairs, Impact & sustainability manager of the Aboca Group.

Aboca is an Italian healthcare company that makes effective, safe and 100% natural products, based on scientific evidence and developed with a Systems Medicine approach. The company combines economic growth, social justice and respect for the environment. That is why they chose to become a Benefit Corporation, a new corporate legal status introduced in 2016 in Italy, the first country in the world after the United States. After this fundamental step, they decided to embark on the B Impact Assessment journey because they wanted to measure in a rigorous way the contribution to the common good that was stated in their articles of incorporation. It was a choice of consistency and also for investigating their ecosystem, looking for areas of potential improvement from the economic and sustainability point of view.

Within their statute as a Benefit Corporation, Aboca has included six public benefit goals, alongside the traditional goal of profit-making.



Today it has some 1,400 employees and operates in 26 countries. Aboca was recognized for [Best For The World™ 2022](#) in the Environment category.

The trainer Jacopo Orlando is also the national Vice president nazionale of AssoBio and member of the technical committee of the Italian Confederation of Business (Confindustria nazionale).

The other trainer is:

**Paolo Polinori**, Professor of Political Economy – Department of Economics, University of Perugia. Managing Editor of the REI magazine -Review of Economics and Institutions-; Member of the editorial

board of "Energies", of the CIRIAF (Interuniversity Center for Research on Pollution and the Environment), of the IAEE (International Association of Energy Economics).

Other speakers:

- Roberto Remedios e Margherita Tiradritti – Department of Impact & sustainability, Aboca
- Fabrizio Boldrini and Maria Rita Bracchini – Director and Head of the European Cooperation Unit, Vila Montesca Foundation.

## Preparation

In terms of preparation, Villa Montesca Foundation took care of:

### **Logistic Organization**

Room Arrangements in advance of the start date of the training in the two sites where the training took place: Villa Montesca in Città di Castello and Centro Congressi La Fortezza in Sansepolcro

The organizers also set up & tested the technology & equipment

### **Dissemination and participants' recruitment**

A dissemination flyer has been prepared and disseminated both online (through websites and social media) and in paper for the recruitment of the participants.

The main target groups of the dissemination activities have been:

- VET learners;
- Local and regional businesses and companies
- Vet organizations external to the Partnership;
- Public Institutions and Organisations working in the field of active labour market policies;
- Entrepreneurial organizations (employers and trade unions) that were interested in the development of the Operation Specialist for BCs,
- Business Companies and organizations,
- Associations, NGOs and Social Organizations
- Employment consultants
- Lawyers and other professional' organizations.



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## PRIMA EDIZIONE DEL CORSO PER



# ESPERTO IN BENEFIT BUSINESS MANAGEMENT

(IN PRESENZA E ON LINE)

### OBIETTIVI

Obiettivo del corso, realizzato nell'ambito del progetto europeo "S4BC – Skills for Benefit Companies", è approfondire il modello delle Società Benefit e B Corp per approcciare una nuova cultura d'impresa responsabile, sostenibile e rigenerativa in linea con l'evoluzione del mercato, della normativa EU, e degli obiettivi dell'Agenda 2030.

### DESTINATARI

Il corso è rivolto principalmente a titolari d'impresa, manager, amministratori, responsabili qualità e ambiente, altro personale d'impresa interessato, commercialisti, consulenti del lavoro, avvocati, altri professionisti.

### STRUTTURA E PARTECIPAZIONE AL CORSO

Il percorso si compone di 5 incontri in presenza e di un percorso di apprendimento facoltativo online. Il percorso completo (in presenza e online) dà diritto a crediti europei ECVET.

## IL CORSO È INTERAMENTE GRATUITO

Per iscriversi compilare il form nel sito della Fondazione Villa Montesca [www.montesca.eu/2.0/iscrizione-corso-s4bc/](http://www.montesca.eu/2.0/iscrizione-corso-s4bc/)

Per ulteriori informazioni contattare [silvia.fanti@montesca.eu](mailto:silvia.fanti@montesca.eu)





**Centro Studi Villa Montescia** | **Fondazione Progetto Altiberina** | **aris** formazione e ricerca **by example**

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### INCONTRI IN PRESENZA

<b>INQUADRAMENTO NORMATIVO E PROCESSO DI TRASFORMAZIONE IN SOCIETÀ BENEFIT. ELEMENTI DI SOSTENIBILITÀ E DRIVER STRATEGICI</b>	<b>1 marzo 2024</b> - 15.00 - 18.00 Villa Montescia - Città di Castello
<b>RACCOLTA DATI, STRUMENTI, STANDARD PRIVATI E REPORTISTICA</b>	<b>8 marzo 2024</b> - 15.00 - 18.00 Centro Congressi la Fortezza – Sansepolcro
<b>EVOLUZIONE DEL QUADRO NORMATIVO EUROPEO E ACCESSO AL CREDITO</b>	<b>15 marzo 2024</b> - 15.00 - 18.00 Centro Congressi la Fortezza – Sansepolcro
<b>LE AZIENDE SI RACCONTANO: ESPERIENZE A CONFRONTO</b>	<b>22 marzo 2024</b> - 15.00 - 18.00 Villa Montescia - Città di Castello
<b>PRATICHE DI SOSTENIBILITÀ E LINEE STRATEGICHE DELLE IMPRESE: TRA BENE COMUNE E OPPORTUNITÀ DI MERCATO</b>	<b>5 aprile 2024</b> - 15.00 - 18.00 Villa Montescia - Città di Castello

### CORSO ONLINE

**Aspetti giuridici, tecnici e di business management delle Società Benefit: approfondimenti**

### DOCENTI

**JACOPO GABRIELE ORLANDO** PhD, Agricultural public affairs, impact & sustainability manager Aboca. Vice presidente nazionale di AssoBio. Membro del gruppo tecnico RSI Confindustria nazionale.

**PAOLO POLINORI** Professore ordinario di Economia Politica – Dipartimento di Economia, Università degli Studi di Perugia. Managing Editor della rivista REI - Review of Economics and Institutions -; Membro dell'IAEE (International Association of Energy Economics).

### Organization of a press conference for launching the course

A press conference to present the course was held on Friday 27 February at 11.00 am in the council chamber of the Municipality of Città di Castello. "Training and Research and carried out as part of the European Project "S4BC - Skill for Benefit Companies" which intends to deepen the Benefit Company and B Corp model, to promote a new responsible, sustainable and regenerative business culture, in line with the evolution of the market, of European Union legislation and of the objectives of the 2030 Agenda".

**Centro Studi Villa Montesca è con Progetto Valtiberina e Aris Formazione Ricerca** presso Comune di Città Di Castello  
27 febbraio - Città di Castello

Stamattina siamo in conferenza stampa per presentare la prima edizione del corso per **ESPERTO IN BENEFIT BUSINESS MANAGEMENT** per approfondire il modello delle società Benefit e B Corp per approcciare una nuova cultura d'impresa responsabile, sostenibile e rigenerativa in linea con gli obiettivi dell'Agenda 2023

Per info [www.montesca.eu](http://www.montesca.eu)

The collage includes a brochure for the course 'ESPERTO IN BENEFIT BUSINESS MANAGEMENT' with the text 'IL CORSO È INTERAMENTE GRATUITO'. It also shows several photos of people seated at long tables in a conference room during the event.

Centro Studi Villa Montesca  
28 febbraio

particolarmente il problema della e il problema della

TTV.it  
28 febbraio

Business sostenibile: al via il corso per figure operative aziendali promosso dalle Fondazioni Centro Studi Villa Montesca e Progetto Valtiberina in collaborazi... Altro...

**TELEPIRELLA**

NOTIZIE TELEGIORNALI PROGRAMMI GUIDA TV CHI SIAMO CONTATTI

ATTUALITÀ

**Un corso per esperto aziendale in benefit**  
teleturista | 28 febbraio 2024 | A1A

A Città di Castello è stato presentato un corso per Esperto in Benefit & Business Management promosso dalla Fondazione Centro Studi Villa Montesca. L'intento è quello di promuovere una nuova cultura d'impresa, rafforzando l'impegno per perseguire un modello di business sostenibile.

**trg media** HOME NOTIZIE VIDEO DIRETTA TV DIRETTA RADIO

**BUSINESS SOSTENIBILE: BUONE PRATICHE AZIENDALI A CONFRONTO A VILLA MONTESCA DI CITTÀ DI CASTELLO**

Business sostenibile: buone pratiche aziendali a confr...  
Copia link

ENTE

0:00 / 2:34

Posta



The screenshot displays a news website with two main articles. The left article is titled "Città di Castello, presentato in comune il nuovo corso di business sostenibile per figure aziendali" and is dated 27 febbraio 2024. The right article is titled "Business sostenibile: al via il corso per figure operative aziendali" and is dated 12 febbraio 2024. The website layout includes a navigation bar at the top, a main content area with images of a meeting and a woman speaking, and a sidebar with a "RESTA CONNESSO" section and a "Social" section. A banner at the top left of the page reads "IL TUO VOTO PER LA VITTORIA" and "VINCE PERUGIA" with the name "Vittoria Ferdinandi Sindaco".



### Training Plan preparation and selection of relevant trainers

A training plan has been drafted as a structured and organized document that outlines the framework and details of the training program in order to ensure that learning objectives are met, participants are engaged, and the training session is both informative and interactive.

The key components of the training plan included:

- **Objectives:** Clearly defined learning goals that specify what participants should know or be able to do by the end of the training session.
- **Agenda:** A detailed schedule of activities, topics, and the timetable. Because the course has been conducted by different trainers, in the plan it has been delineate who is running which section and who is supporting

- **Materials:** It is referred to any training material, resources, and tools required for the course, such as presentations, handouts and the S4BC Online Platform for the on-line part of the course.
- **Follow-up:** Plans for gathering feedback from participants and assessing the overall success of the training session. This included choosing a survey tool for analyzing the impact of the training.

All in all we used, as a reference, the Kolb's learning cycle which is appropriate in training design, especially when it comes to working with adult learners. Simply go through it step-by-step and include activities for each of the four parts of this cycle.

- **Concrete experience,** with room for practical, experiential activities;
- **Reflective observation:** a time to debrief, form opinions on what the exercise revealed, and discuss them with others;
- **Abstract conceptualization,** when it's up to the trainer to offer models, theories and frameworks conducive to deeper understanding and, lastly
- **Active experimentation,** in which participants are guided to begin applying the sustainability learnings to their real-world situations, for example with a role play or simulation.



## Implementation of the Piloting

The implementation of the training course reflects the general objective and the key need outlined by the S4BC Consortium Organisations: to foster the cultural transformation of European business models through vocational training and skills upgrading actions by:

- Increasing consistency between training needs and professional growth paths (reduction of mismatching);
- Supporting the declination of the role of the Operation Specialist for BCs at national level;

This was done in three main key areas:

- implementation: operational implementation of the transformation;
- monitoring: qualitative and quantitative control and monitoring;
- impact evaluation (with an outcomes-based approach): strategic area, to define and evaluate the impact of the company's actions in the environmental and social field.

In terms of training provision, the **Course in presence** was composed by 5 sessions, based on the following topics:

1. Regulatory framework and process of transformation into Benefit Corporation. Elements of sustainability and strategic drivers

March 2023 from 3.00 pm to 6.00 pm at Villa Montesca – Città di Castello

2. Data collection, tools, private standards and reporting

8 March 2023 from 3.00 pm to 6.00 pm at the La Fortezza Congress Center – Sansepolcro

3. Evolution of the European regulatory framework and access to credit

15 March 2023 from 3.00pm to 6.00pm at the La Fortezza Congress Center – Sansepolcro

4. Companies tell their story: compared experiences

22 March 2023 from 3.00 pm to 6.00 pm at Villa Montesca – Città di Castello

5. Sustainability practices and strategic lines of companies: between common good and market opportunities

29 March 2023 from 3.00 pm to 6.00 pm at Villa Montesca – Città di Castello

The **online course**, on the other hand, was based on the 5 areas of the curriculum realized in the S4BC project :

- a) Business organization of BC;
- b) Technical aspects of BC: implementation (with an outcomes-based approach), monitoring and impact evaluation;
- c) Legal aspects: juridical framework and quality standards.
- d) Strategic aspects of BCs: environmental sustainability and social inclusion, profiles and scenarios;



e) European and International dimension: development of BC model at EU level and internationalisation of Operation Specialist for BCs.

The methodology include multiple Learning Styles and approaches, combining theory and practice, giving time for individual reflection, discussion with others, and practical applications. Whenever possible, we enabled participants to choose their own pathway, for example by offering different ways of interacting with the material (with a discussion, by turning it into a poster, and so on) at various tables.







## Quality and Evaluation

The participants were very happy with the training sessions of the course for course for “Operational specialist for benefit companies” . Both the in presence and the online sessions received overwhelmingly positive feedback from all the attendants.

Most of the participants strongly believed that the trainings were well informed, had clear objectives and lived up to their expectations. Also, they believed that the activities of the training stimulated their interest on the Sustainable and social approach for adapting the business strategies to the challenges of the Agenda 2030.

Their enthusiastic embrace of the contents of the training course from the outset underscores the effectiveness of the training and its relevance to fostering the role of the companies in creating a more sustainable world.

Furthermore, they believed that the training activities provided them with a clear vision about how to manage their companies taking care of social and environmental aspects.

They mainly appreciated the topics related to:

- Sustainability practices and strategic lines of companies: between common good and market opportunities
- Business organization of BC;
- Evolution of the European regulatory framework
- European and International dimension: development of BC model at EU level

They also appreciated a lot the session in which some Companies told their story: compared experiences

Overall, participants found that the facilitators were very well prepared and expressed their satisfaction about the training experience, stating that it was a valuable experience.

Furthermore, attendants stated that a highly structured activity material was provided, and it was very helpful and supportive.

The participants also gave some relevant suggestions, such as:

- Think about the possibility of organizing a new course in consideration of the evolution of the topic
- Think about the possibility of organizing a conference to raise awareness and empower other companies in the development of social and environmental strategies
- Finally, they suggested that the materials provided during the in-presence training should be integrated into the S4BC project Platform.

Furthermore, what has been very appreciated is the fact that the Course guided the participants and the companies in which they operate toward discovering strategies that work best for safeguarding the environment, strategies that are context-specific, personalized, and culturally responsive.

All in all, the feedback from participants has been overwhelmingly positive, with reports highlighting the materials' engaging and thought-provoking nature. Participants expressed increased awareness on various aspects related to the interconnection between business and sustainability. Moreover, all participants conveyed their eagerness to continue using the online training course and recommended them to other colleagues. This collaborative effort reflects a commitment to cultivating a safer and more responsive business management.

We would like to conclude with some quotes pointed out:

“The course for Operational specialist for Benefit company gave me the opportunity to revise the “felt sense” of being a company, which can arise from social and environmental components that have to be taken into account in the process of management”.

"I have to express my gratitude for being part of this program. At the beginning I thought it was just another “business course”, but it wasn’t. the topics are really innovative, they can make changing mindset. It’s an experience and it gave very positive results in terms of reflection and further innovation in my business model”

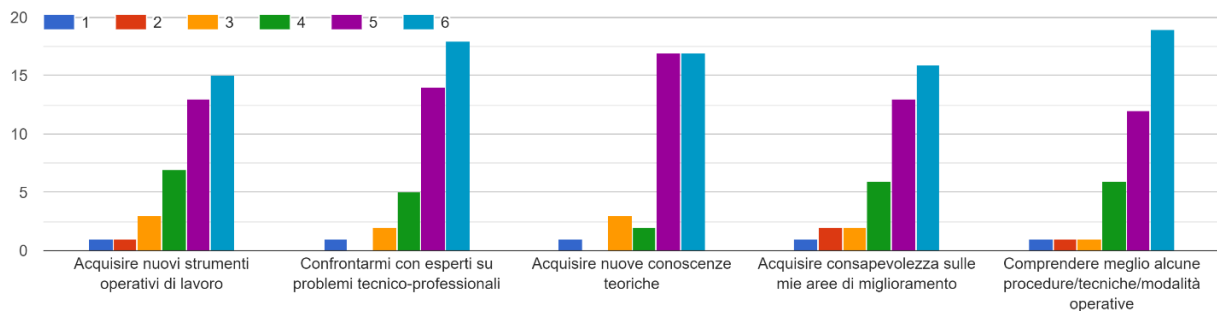
“It has been a very interesting and effective experience. It allowed collaboration, exchange of opinions and development of critical thinking”

Overall, participants stated that the program was excellent, and the material given to them was properly structured and met their needs.

Here below the link to the evaluation questionnaire delivered to all the participants

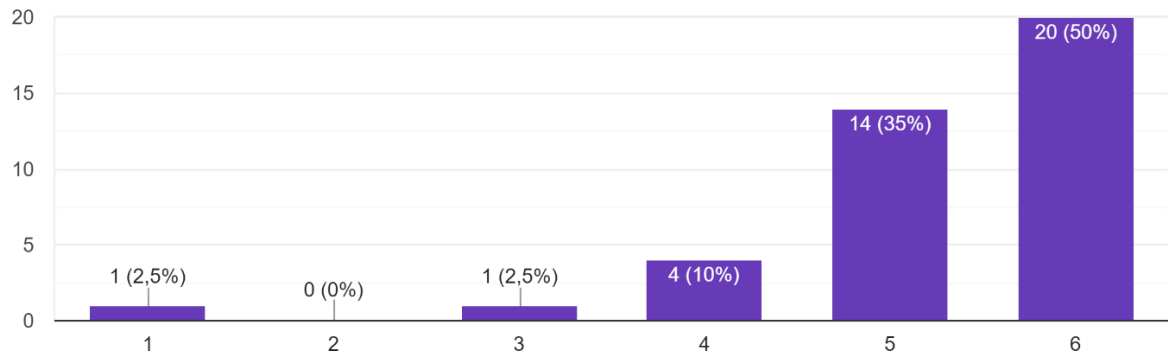
[https://docs.google.com/forms/d/e/1FAIpQLScv35SZnOu30fOYzO1fGp41awqbjqNprQpi2B\\_wlrVOq3pf5w/viewform](https://docs.google.com/forms/d/e/1FAIpQLScv35SZnOu30fOYzO1fGp41awqbjqNprQpi2B_wlrVOq3pf5w/viewform)

1. Quali obiettivi si è posto prima di partecipare all’attività formativa? (da 1=per nulla d’accordo a 6=del tutto d’accordo)



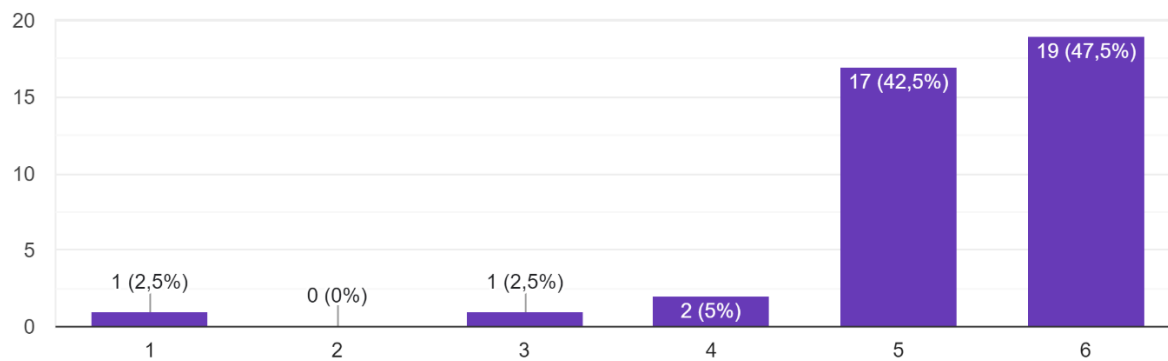
2. In che misura le sue aspettative sono state soddisfatte? (da 1=per nulla, a 6=del tutto)

40 risposte



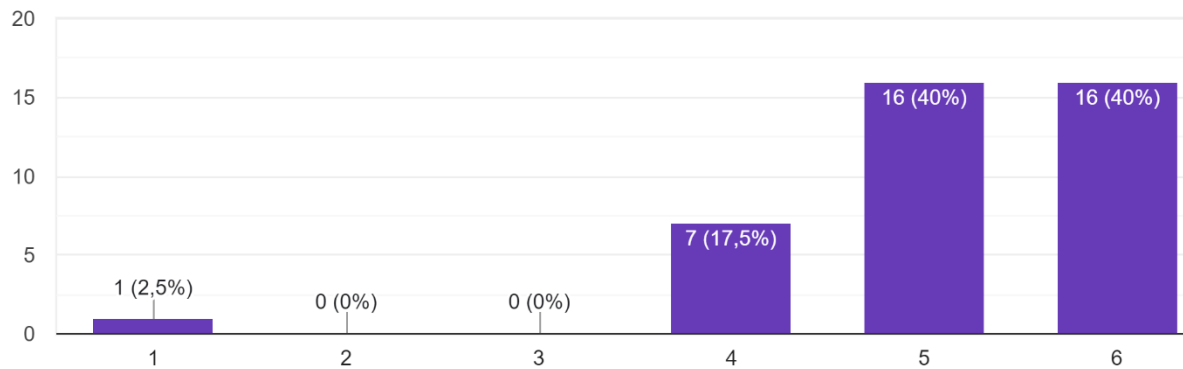
3. Come valuta il suo grado di interesse verso i temi trattati? (da 1=basso interesse, a 6=alto interesse)

40 risposte

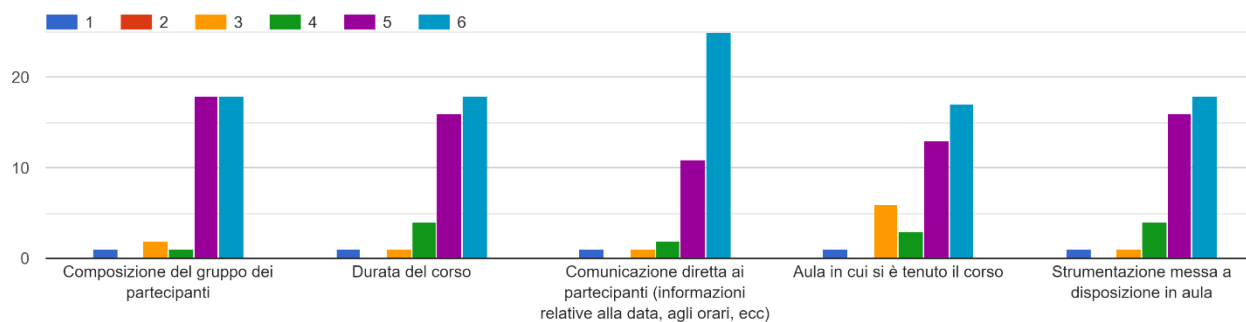


4. Quanto considera utili i temi trattati, considerando le esigenze della sua realtà lavorativa? (da 1= per nulla utili, a 6= del tutto utili)

40 risposte



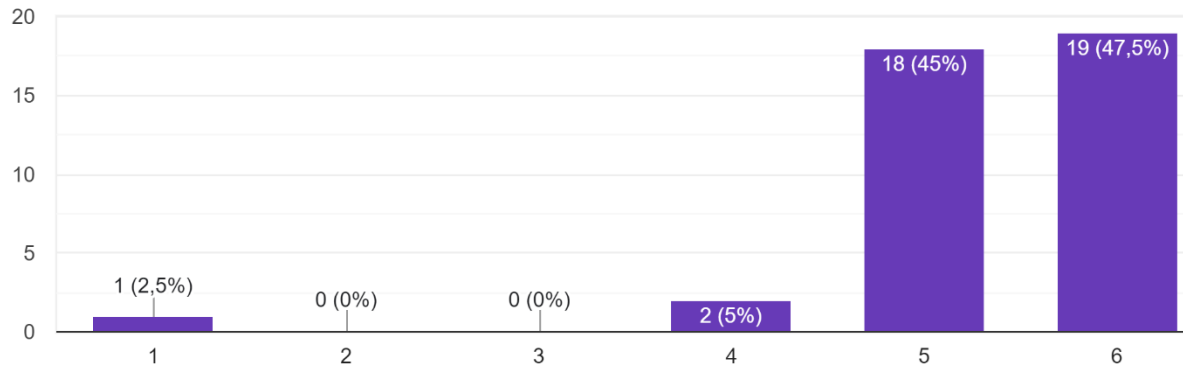
5. Come valuta l'organizzazione del corso? (da 1=per nulla adeguata, a 6=del tutto adeguata)



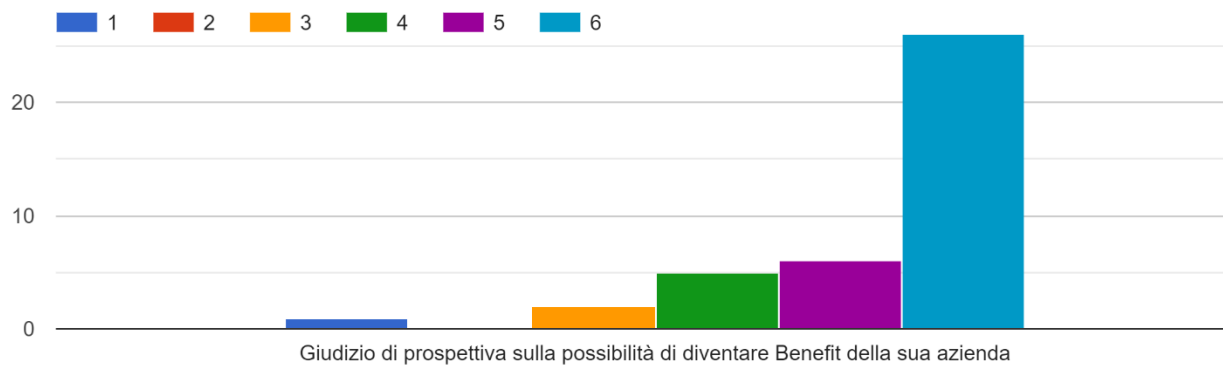


6. Può esprimere un giudizio complessivo sul corso: un voto globale della sua soddisfazione? (da 1=per nulla soddisfatto/a, a 6=del tutto soddisfatto/a)

40 risposte



7. Pensa che potrà avviare un processo verso l'adesione al Modello Benefit (da 1=No non credo affatto a 6=lo farò senz'altro)



## Conclusions

The impact and the results of the training course has been overwhelmingly positive.

It's worth mentioning that the participants told us that the components of the course are very well structured, reflecting the unique nature of each company. It was not seen as a traditional approach based on "learn about" the factors that can influence the environmental strategy of a company, rather the course placed more emphasis on an actively "learning for". At this regard the course material and the S4BC Learning Platform gave and will continue to give a strong support in implementing a sustainable strategy towards becoming benefit corporation or benefit company.

In particular, it is possible to cite a very relevant example of the success and impact generated by the course in the Umbria region where, following the project developed and the training course, the companies that attended the course set up a consortium for the development of a benefit sector in the local area. The Upper Tiber valley in Italy is now one of the decentralised local areas with the higher number of companies that have formally obtained the transformation (or are into the process of transformation) into benefit companies.

## Piloting of S4BC Training Course in Portugal

### Participants Profiles

All participants in the training course are VET students.

They belong to a 12th grade class, with Vocational Training in Sports and to 1 10th grade class, also with Vocational Training in Sports. Their ages range from 16 to 18 years old.

The students of the 12th grade class belong to an AEJE innovation project since the 10th grade. The teaching and learning process for these students follows the PBL methodology (Project Based Learning).

### Trainers

The teachers who conducted the training for the 12th grade students were: Jorge Daniel Arada (Teacher of History) and Mónica Alexandra Sousa (Teacher of English).

The teachers who conducted the training for the 10th grade students were: Isaque Manuel Tomé (Teacher of Philosophy and Psychology) and Jorgelina Antónia Arede (Teacher of Economy and Area of Integration).

All these four teachers have 25+ years of experience with students of different ages and school years. They have been working in AEJE for some time and they have know these students at least since the beginning of the school year - Teachers Jorge and Mónica have been with the 12th grade class for 3 years. As teachers, they are quite used to collaborate with the school in different Erasmus+ Projects and they have already piloted different activities with huge success.

## Preparation

A meeting was held beforehand with the teachers selected to conduct the piloting phase. The S4BC project was explained as well as its objectives and possible outcomes. A quick overview of the project's expected results was also done.

A joint exploration of the materials to be used during piloting was done and all the necessary material was shared with the teachers that were going to later use it. A methodology for the use of these materials with the students was negotiated and set among the teachers. The type and amount of information to be passed on the students, so that they were able to participate in piloting sessions and be aware of the themes of the modules, was also defined.

Each teacher was assigned the tasks and the contents he/ she had to approach. The time limit of the sessions was also defined.

## Implementation of the Piloting

- Date: March, 26th and April, 9th

- Number of sessions held: 4 sessions of 90 minutes each

- Participants involved in each session:

15 students of the VET course of Sports - 10th grade 15 students of the VET course of Sports - 12th grade

- Units that have been piloted: Units 1 and 3

- Results obtained in the piloting of each Unit

In general, the contents were apprehended by the students and the different tasks were accomplished successfully.

As the sessions were somewhat lengthy (90 minutes), the students showed some tiredness towards the end of the sessions.

The content and materials suited the age and level of the students.

## Quality and Evaluation

From gathering the opinions collected through the quality evaluation questionnaire, we can state that the used materials were suitable and well-understood by students. They were able to understand the theory and to talk about it.

Students mentioned it would also be beneficial for the training to include activities outside the classroom, as for example, field trips to “benefit companies”.

They have also identified as an opportunity for improvement, the watching of short videos on the approached themes, as well as the carrying out of debates among the students and/ or talks and interviews with entrepreneurs from benefit companies.

The results of the piloting matched their expectations.

Feedbacks received by the participants and impact the piloting had on the participants:

The students were not familiar with this type of company and were quite motivated to learn more on the subject. They feel that now they are better equipped to understand the reach of the actions of this type of business and also recognise the impact of benefit companies on society.

As these students are entering the job market shortly, working for this type of company is something they will keep in mind - not only because they need a job but also because of the positive impact benefit companies can have on society.

## Conclusions

The modules and the materials suit the students profile.

Videos, field trips to existing benefit companies and active learning methodologies (like debates) could be used for more effective learning.