

2nd Call for Project Proposals

Priority Axis: Boosting the local economy

Investment Development and Empowerment Action

IDEA

PROJECT PRESENTATION

Partnership

Auleda Local Economic Development Agency (LB)

***Municipality of Himara (PB2), University of Ioannina (PB3), THREE THIRDS
SOCIETY (PB4), Municipality of Arta (PB5)***

Our Main IDEA

"To match supply and demand for social investments"

The project is co funded by the European Union and National funds of Greece and Albania
via the Interreg IPA CBC Programme "Greece - Albania 2014-2020"



The state of the art of the issue addressed

- ✓ lack of financial - investment tools for social economy actors and social entrepreneurship
- ✓ social entrepreneurs in very few cases have own funds while they are practically excluded from bank lending through systemic banks

On the other hand

- intense activity of national-local organizations which have helped the ties of expatriate Greeks and Albanians with their place of origin and the people who continue to reside in it



The Problems

- ✓ No financial tools that can ensure the legality and transparency of funding and which will not be burdened with excessive taxation or bureaucracy
- ✓ Innovative social entrepreneurship ideas cannot be easily known or they are unable to become mature and therefore cannot convince for their feasibility leading to many questions on behalf of potential donors /investors /supporters
- ✓ No reliable and flexible mechanism to monitor and ensure that all resources are being exploited for the purposes they were meant for and to substantiate the reasonableness of the cost



IDEA project

- ✓ Studies and records the supply for support of social economy initiatives and the demand for such form of support at local level
- ✓ Studies and creates hybrid financing tools which can be applied at local level
- ✓ Brings together social entrepreneurs with potential sponsors /supporters /investors and acts as a facilitator
- ✓ Implements advisory, training and capacity building actions towards social economy actors
- ✓ Creates a flexible and reliable monitoring mechanism
- ✓ Creates tools and methodologies for the measurement of social impact
- ✓ Creates non-financial support tools



Main Geographic Areas of Implementation

- ✓ **Vlora**
- ✓ **Himara**
- ✓ **Ioannina**
- ✓ **Arta**

With no exclusion criteria



WORK PACKAGES

- ➔ WP1: Project Management & Coordination
- ➔ WP2: Communication & Dissemination
- ➔ WP3: Research and Analysis
- ➔ WP4: Seminars, Training and Interactive Consulting
- ➔ WP5: Project Sustainability



WP1: Project Management & Coordination

- ✓ **Project and Financial Management**
- ✓ **Project Meetings**
 - Kick-off Meeting (LB) – Vlora
 - 2nd Project Meeting (PB3) – Ioannina
 - 3rd Project Meeting (PB2) – Himara
 - 4th Project Meeting (PB4) – Ioannina
 - Another Projecting Meeting in Arta (PB5) during the Networking Conference
- ✓ **Evaluation (LB)**
- ✓ **Audit Reports (PB3, PB4, PB5)**



WP2: Communication & Dissemination

✓ Production and promotion of Communication material and tools

- Communication Plan, Strategy, Templates, Logos, Slogans etc. LB
- Communication Managers. LB, PB2, PB4, PB5.
- Radio Campaign through Radio Spots LB, PB2, PB4, PB5
- Social media Campaign. Boost Posts on Facebook, Twitter and LinkedIn. Through the accounts of LB, PB2, PB4, PB5. Creating project's accounts managed by PB4
- Internet campaign through Web Banners on popular portals. LB, PB2, PB5.
- Various Posters. LB, PB2, PB4, PB5.
- Two Promotional Videos in Greek, Albanian and English. PB2, PB4.
- E-Mail Campaign / Press Releases / E-Newsletter (per month). LB, PB2, PB4, PB5
- Roll Up Banners (6 in total). LB, PB2, PB4.



- Promotional brochures (4.000 in total). LB, PB2, PB4, PB5

✓ **Publicity events and Conferences**

- Launch and Closing Info-Days

✓ **Project's Web Portal. LB**

- Development
- Monitoring and Update of the content

✓ **Actions to attract investors**

- Create four (4) ROI models - packages for social investors. a) cost benefit analysis model b) social impact model c) sponsorship model d) mixed model (in English and Albanian). LB.



- Create participatory investment models according to a) social investments budget b) the presence of multiple investors (in English and Albanian). One model for projects up to 10.000 €. One model for projects between 20.000 -50.000 €. LB.
- Create a Presentation Package for each model (short and extended versions) and templates to be used according to its project (in English and Albanian) LB
- Adjust Different models - packages for social investors based on a) economic cost benefit b) social impact c) promotion and advertisement of the social investor d) mixed model (Greek). PB5.
- Adjust Different models - packages for social investors based on a) social investments budget b) the presence of more than one investor (Greek). PB5.
- Adjust a Presentation Package for each model (short and extended versions) and templates to be used according to its project (Greek). PB5.



- Design and drafting a targeted presentation package for 4 social investments in Vlora and Himara. Social Investments will be chosen through an open call to local stakeholders (English and Albanian). LB.
- A mini communication plan for promoting the 2 social investments in Vlora. Implemented through social media and Internet campaign. LB.
- Networking actions and Meetings for finding investors for the 2 social investments in Vlora. LB.
- A mini communication plan for promoting the 2 social investments in Himara. Implemented through social media and Internet campaign. PB2.
- Networking actions and Meetings for finding investors for the 2 social investments in Himara . PB2.
- Design and drafting a full presentation package for the 2 social investments in Ioannina. Social Investments will be chosen through an open call to local stakeholders.PB4.



- A mini communication plan for promoting the 2 social investments in Ioannina. Implemented through social media and Internet campaign. PB4.
- Networking actions and Meetings for finding investors for the 2 social investments in Ioannina. PB4.
- Design and drafting a full presentation package for the 2 social investments in Arta. Social Investments will be chosen through an open call to local stakeholders (Greek and English). PB5
- A mini communication plan for promoting the 2 social investments in Arta. Implemented through social media and Internet campaign. PB5.
- Networking actions and Meetings for finding investors for the 2 social investments in Arta. PB5.

WP3: Research and Analysis

✓ Assessment of the potential demand & Supply

The project is co funded by the European Union and National funds of Greece and Albania
via the Interreg IPA CBC Programme "Greece - Albania 2014-2020"



- Designing templates, methodology and guidelines for the assessment phase in Albania (cooperation with PB4 and PB5). LB..
- Designing methodology and guidelines for the assessment phase (cooperation with LB) - Greek and English. PB4.
- Designing templates for the assessment phase (cooperation with LB) - Greek and English. PB5.
- Focus groups with social operators, social entrepreneurs, civil society organizations (Organizing and Implementing 4 focus groups) – Vlora. LB.
- Interviews / technical Meetings with potential investors in Albania and abroad – Vlora. LB.
- Identifying the actors of the social market and creating a database for the demand (social entrepreneurs, civil society organizations, communities etc) – Vlora. LB.
- Surveying the demand's trends - Processing survey's results and writing a relative report – Vlora. LB.



- Identifying the potential investors and creating a database containing the list of investors – Vlorë. LB.
- Analyzing the trends and interests of potential investors. Processing the results - Writing a report. Vlorë. LB.
- Focus groups with social operators, social entrepreneurs, civil society organizations (Organizing and Implementing 4 focus groups) - Himarë. PB2.
- Interviews / Meetings with potential investors – Himarë. PB2.
- Identifying the actors of the social market and creating a database for the demand – Himarë. PB2.
- Surveying the demand's trends - Processing survey's results and writing a relative report – Himarë. PB2.
- Identifying the potential investors and creating a database containing the list of investors – Himarë. PB2 .



- Analyzing the trends and interests of potential investors. Processing the results - Writing a report. PB2.
- Focus groups with social operators, social entrepreneurs, civil society organizations (Organizing and Implementing 4 focus groups) – Ioannina. PB4.
- Interviews / Meetings with potential investors – Ioannina. PB4.
- Identifying the actors of the social market and creating a database for the demand – Ioannina. PB4.
- Surveying the demand's trends - Processing survey's results and writing a relative report – Ioannina. PB4
- Identifying the potential investors and creating a database containing the list of investors – Ioannina. PB4.
- Analyzing the trends and interests of potential investors. Processing the results - Writing a report. Vlora. PB4.



- Focus groups with social operators, social entrepreneurs, civil society organizations (Organizing and Implementing 4 focus groups) – Arta. PB5.
 - Interviews / Meetings with potential investors – Arta. PB5.
 - Identifying the actors of the social market and creating a database for the demand - Arta (coordination of the activity). PB5.
 - Surveying the demand's trends - Processing survey's results and writing a relative report - Arta (coordination of the activity). PB5.
 - Identifying the potential investors and creating a database containing the list of investors - Arta (coordination of the activity). PB5.
 - Analyzing the trends and interests of potential investors. Processing the results - Writing a report. Arta (coordination of the activity). PB5.
- ✓ **Developing hybrid social finance instruments & models**
- Presentation of the financial tools and models (economic version) - (Greek & English) PB3



- Customization of all the proposed tools to the Greek Social Market -PB3.
 - Customization/specification of suitable social finance tools and models of all the proposed tools to the Albanian Social Market in Albanian and English (finance tools manual). LB.
 - Creating investor friendly guides and presentations for social investors and social operators (for each hybrid financial tool will be developed 2 guides - one version for social investors & one version for social operators). (in English and Albanian). LB.
 - Creating investor friendly guides and presentations for social investors and social operators (for each hybrid financial tool). (Greek). The guides will be based on the ones created in English by Auleda with the necessary verifications PB3.
- ✓ **Setting up the social finance instrument's terms and conditions and drafting all the necessary law rules and documents**
- Create the necessary legal and financial documents to activate the funding mechanism in line with EU law and national law (Financial experts, lawyers etc. will draft the legal



documents for setting up each social finance tool or mechanism. All the necessary documents (e.g. contracts) will be based on EU or national legislation. (in English and Albanian).LB.

- Financial experts, lawyers etc. will draft the legal documents for setting up each social finance tool or mechanism. All the necessary documents (e.g. contracts) will be based on EU or national legislation. (Greek). Apply the necessary changes to the document's English version prepared by Auleda. PB3.

WP 4 Seminars, Training and Interactive Consulting

✓ *Training Visits for the capitalization of previous cooperation experiences*

- Planning and Organizing the Training Visit in Vlora. LB
- Planning and Organizing the Training Visit in Himara. PB2
- Planning and Organizing the Training Visit in Ioannina. PB4
- Planning and Organizing the Training Visit in Arta. PB5



✓ **Coaching, mentoring and capacity building**

- Methodology for the selection (an open call will be published) and the assessment process of investment ready social projects. LB.
- Methodology for the selection and the assessment process of investment ready social projects. Translation and Adjustment in Greek. PB4
- Creating tools for supporting the maturation and planning of projects (e.g. project model assessment, project plan review and refining, market analysis, options analysis, implementation of the plan, measuring progress, evaluation and improvement, feasibility analysis etc). Includes desktop research and study of EU and global Best Practices. LB.
- Translation and Adjustment of the tools created by Auleda in Greek. PB4
- 400 hours of capacity building sessions. It also includes offline support through telephone, mail, skype. LB.



- 400 hours of coaching and mentoring sessions. It also includes offline support through telephone, mail, skype. LB
- Building commitment between potential investors, social operators and the coaching, mentoring, capacity building team through group networking workshops. 10 workshops. LB.
- Assessment and monitoring phase (Taking part in a Greek-Albanian Steering Committee that will be assessing the investment projects). LB.
- Follow up activities. LB
- Taking part in a Greek-Albanian Steering Committee that will be assessing the investment projects. PB2.
- 400 hours of capacity building sessions. It also includes offline support through telephone, mail, skype. PB3.



- 54 hours of coaching and mentoring sessions. It also includes offline support through telephone, mail, skype. PB3.
- Building commitment between potential investors, social operators and the coaching, mentoring, capacity building team through group networking meetings. 5 workshops. PB3.
- Taking part in a Greek-Albanian Steering Committee that will be assessing the investment projects. PB3.
- Follow up activities. PB3.
- 610 hours of capacity building sessions. It also includes offline support through telephone, mail, skype. PB4
- 80 hours of coaching and mentoring sessions. It also includes offline support through telephone, mail, skype. PB4.



- Building commitment between potential investors, social operators and the coaching, mentoring, capacity building team through group networking meetings. PB4
- Taking part in a Greek-Albanian Steering Committee that will be assessing the investment projects. PB4
- Follow up activities. PB4
- 230 hours of capacity building sessions. It also includes offline support through telephone, mail, skype. PB5
- 80 hours of coaching and mentoring sessions. It also includes offline support through telephone, mail, skype. PB5.
- Building commitment between potential investors, social operators and the coaching, mentoring, capacity building team through group networking meetings. PB5.
- Taking part in a Greek-Albanian Steering Committee that will be assessing the investment projects. PB5.



- Follow up activities. PB5.
- ✓ **Networking Conference (Forum)**
 - Networking Conference (Forum) in Arta. PB5.
 - Networking Conference (Forum) in Himara. PB3.
- ✓ **Mentors, Coaches and Advisors Training**
 - Organizing two three days seminars (Vlora and Himara). LB.
 - Creating Educational Material and Handouts in English and Albanian. LB.
 - Organizing two three days seminars (Ioannina and Arta). PB3.
- ✓ **Training Seminars for social operators & entrepreneurs**
 - Organizing two three days seminars (Vlora). LB. Program, Educational Material, Handouts etc.



Interreg - IPA CBC

Greece - Albania

IDEA



- Organizing two three days seminars (Himara). PB2. Program, Educational Material, Handouts etc.
- Organizing five three days seminars (Ioannina & Arta). PB3. Program, Educational Material, Handouts etc.

The project is co funded by the European Union and National funds of Greece and Albania
via the Interreg IPA CBC Programme "Greece - Albania 2014-2020"



WP5: Project Sustainability

✓ **Social Impact Measurement**

- Based on EU best practices selecting a methodology for social impact measurement. Adjusting the methodology. Creating a guide in English and Greek for each social operator with the necessary templates (4 guides in total). PB4
- Adjusting the methodology. Creating a guide in Albanian for social operators with the necessary templates. LB.
- Measure the Social Impact of the 4 pilot social projects. PB4.
- Measure the Social Impact of the 4 pilot social projects. LB.

✓ **Develop Reporting Tools / communication code in order to build long-term mutual trust and confidence**

- Develop Reporting Tools, procedures and templates (Greek and English). PB4.



- Adjusting Reporting Tools developed by Three Third's Society. PB2.
- Translation in Albanian. PB2.

✓ **Sustainability study**

- Sustainability study for Albania. PB2.
- Sustainability study for Greece. PB4.



Interreg - IPA CBC 
Greece - Albania
IDEA

