



Output number 9

Output title ELIE 2.0 - LIVE PROJECTS TOOLKIT

Project Acronym	Elie 2.0
Project title	Eliemental: Innovations in Enterprise Education for Groups Vulnerable to Social Exclusion
Project Agreement Number	2019-1-UK01-KA202-061939
Funding Scheme	Erasmus+
Coordinator	ULANC
Project start date	01/09/2019
Duration	36 months
Project end date	31/08/2022

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1. User guide

a. Introduction

The Elie 2.0 project aims to support enterprise learning in the heart of small communities. Elie 2.0 is built upon the work of the Eliemental project (<https://eliemental.org/eliemental/>), which is an enterprise and employability soft-skills development programme. Elie 2.0 develops soft and hard skills for enterprise, and is designed to follow-on from the Eliemental programme, for trainees who are considering starting their own business. Elie 2.0 includes an element of learning by experience, using real-world, live projects, set in the communities where our trainees live. These live projects are supported by Community Enterprise Coaches (CECs), who will encourage trainees as they work through the self-study elements of the programme, seek out live projects for the trainees, supervise the project and support the trainees in presenting their work to the commissioner of the project.

b. What is a Live Project?

A live project is a piece of work which is required for a purpose by a business or organisation. It can be implemented according to different scenarios (1, 2, 3, 4, 5, 6, 7), explained in this document. Examples of the live projects could include: market research, developing a publicity or promotion campaign, identifying a new product or gap in a market, recruiting volunteers or finding funding opportunities (in general they can be directly based on the topics covered in Community Enterprise Toolkit). Live projects can also be more complex and focus on to the development or improvement of a Business Model Canvas (BMC) or Community Enterprise Business Model Canvas (CEBMC), which are explained further in this document.

c. How Much Work is Needed?

Depending on trainees preferences and/or chosen scenario, a live project can be an individual or a team task (for two or three Elie 2.0 trainees). It should take about 16 hours of work to complete, and will be supported by a Community Enterprise Coach.

d. Live Project Partners

All communities include a range of small businesses and organisations. Live projects are developed by the Community Enterprise Coach in partnership with a small business or local organisation. Live project partners could include (but are not limited to): various local businesses, independent shops (not chain stores), youth clubs/kids clubs, schools, charities, or larger organisations that take part in community work (e.g., a university, hospital, power station or Further Education College). The Community Enterprise Coach will identify potential project partners and liaise with them to create a live project brief for the trainees.

e. Live Project Brief

The project brief should use the template provided in the Elie 2.0 resources. It will include details of which organisation the trainees are working with, the key contact in that organisation, and the name and contact details of the Community Enterprise Coach. In general, it is the Community Enterprise Coach who will liaise with the organisation providing the project. The brief will set out the problem to

be addressed by the trainees and will include other relevant information including details about the organisation and how the project should be presented once completed. Suggested presentation formats include a brief, written report (up to 3 pages), a short slide show presentation, an in-person or video-recorded pitch, or a face-to-face consultation with the Community Enterprise Coach, the trainees and a representative from the providing organisation. If desired a combination of these presentation methods could be used. You will find the Live project brief, further in this document.

f. Links to Elie 2.0 Community Enterprise Toolkit.

Once the Community Enterprise Coach has identified a live project opportunity and created a live project brief the relevant Units and Modules from the Community Enterprise Toolkit should be identified to help trainees link their learning to the project activity.

g. Live Projects and the Business Model Canvas (BMC) / Community Enterprise Business Model Canvas (CEBMC)

Elie 2.0 found the Business Model Canvas (BMC) to be a useful way of developing a good understanding of the needs of the organisation or business who have commissioned a live project brief. A BMC helps with understanding a business and identifying needs and opportunities. The BMC sets out the most important elements of a business and allows you to identify where improvements or innovations can be made.

The BMC covers the following areas,

1. Customer Segment – this simply means a breakdown of the types of customers or service users. A health centre will service all sectors of society, but may see a great proportion of older people and young children, rather than working age adults. A night club may have customers mostly in the age group 18-30, a trampolining centre may attract families with young children. This section of the BMC, together with section 4 and 5, will be useful for live projects aiming to identify where a business can grow through attracting new customers .
2. Value Proposition, this sets out the organisation’s products and services, and is useful for projects wanting to help a business expand through identifying new opportunities.
3. Revenue streams are sources of income. Under this section you can also include services provided for free, as these are value-added elements.
4. Channels are the methods used to communicate with customers or service users. This can include face to face interactions, websites, posters, fliers, email and so on. If you have set up a marketing based live project this section will be important in understanding how the business currently communicates.
5. Customer relationships explores how the business or organisations builds and maintains relationships. This is important for projects seeking to widen a customer base and aiming to find new markets
6. Key activities – this section sets out the mission of a business, understanding key activities can help with projects looking to identify new markets or opportunities for a business.
7. Key resources are the underlying foundations including intangibles such as know-how, contacts, people, skills and money for investment.

8. Key partners – this can include the wider business community, residents, service users and other important organisation (local municipal authority, university etc) who can help with business development
9. Cost structure – this aspect relates to activities and resources and may not be relevant to most live projects, but appears in the BMC.

Not all elements of the BMC will be needed for all projects, but it remains a useful tool. In our guide we provide a traditional version of the BMC and a version more suited to community groups and social enterprise.

For some projects, ELIE 2.0 proposes to use a Community Enterprise Business Model Canvas (CEBMC), which is a modification of BMC. You will find its explanation further in this document.

BMC and CEBMC is directly linked with Community Enterprise Toolkit. Information from the Community Enterprise Toolkit can be used to develop the BMC and CEBMC. You will find the description of the links further in this document.

h. Supervising the Live Project

Your trainees may not have taken part in a similar type of work before, so regular meetings will be important to help them complete the project to a good standard and on-time. An initial planning meeting should take around 90 minutes. Creating a step-by-step plan will help the trainees break down the tasks into manageable units and enable the work to be shared out fairly. We also recommend regular meetings to check the progress of work. Many trainees will be unfamiliar with project management and helping them gain these skills is an important part of the Enterprise Coach role. The Enterprise Coach will then support the trainees in presenting their findings to the project provider, and give feedback and a certificate of completion to the trainees.

i. Live Project Assessment

To give the trainees support and feedback, the ELIE 2.0 developed Live project assessment guidelines and templates, which can be found further in this document. They include detailed assessment information and examples that would allow for providing feedback to the trainees.

2. Live Project Brief

Name of the organisation	
Key contact in the organisation	
Name and contact details of the Community Enterprise Coach	
Description of the areas for improvement /problem (s) to be addressed by the live project	
Outcomes expected by the organisation as a result of the live project implementation	
Time frame of the live project	
Project meetings (dates, times and venues)	
Other information (useful for the project)	

3. Live project scenarios

The live projects can be implemented according to different scenarios.

①	Development of the Business Model Canvas (BMC) for a new business*
②	Development of the Community Enterprise Business Model Canvas (CEBMC) for a new business (community-based)**
③	Development of the Business Model Canvas (BMC) for an existing business*
④	Improvement of the Business Model Canvas (BMC) for an existing business * (If a BMC has been previously developed for that business)
⑤	Extension of a Business Model Canvas (BMC) for an existing business** into the Community Enterprise Business Model Canvas (CEBMC) (If the standard business wants to become community-based)
⑥	Addressing specific business needs / Development of elements of the Business Model Canvas (BMC) for business related activities***
⑦	Addressing specific community-based needs / Development of elements of the Community Enterprise Business Model Canvas (CEBMC) for community-based activities (e.g. not business-oriented)****

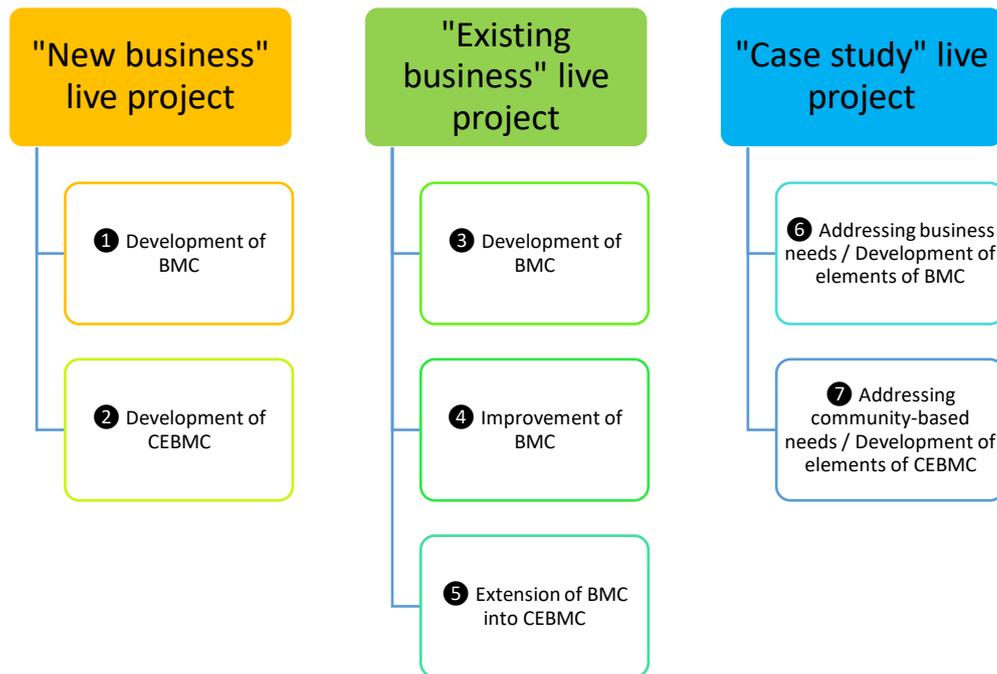
* This scenario can be used for new or existing standard businesses (not community-based ones). The aim of this scenario is to develop a BMC according to the guidelines presented in this document

** This scenario can be used for new or existing community-based enterprises. Community-based enterprises use business to improve the life of a community. They are different from private enterprise because their business activity is undertaken as a means of achieving community benefit, not (mostly) private gain. Scenario 5 is best for standard businesses that want to become community-based. The aim of this scenario is to develop a CEBMC according to the guidelines presented in this document

*** This scenario can be used if the trainee has a business idea that doesn't fit the BMC and would like to use Community Enterprise Toolkit (IO3) content to address it (e.g., identify ways to explore target market, find the most suitable location for the business, run promotion and advertising activities, etc.). The aim of this scenario is to address specific business needs with the content of IO3 and if possible to use the BMC logic (e.g. use some of its segments) to solve the stated problem.

**** This scenario can be used if the trainee have a community-based idea that doesn't fit the CEBMC and would like to use Community Enterprise Toolkit (IO3) content to address it (e.g., identify ways to raise funds for a local charity organisation, find most suitable location for a social enterprise, run promotion and advertising activities for a school, etc.). The aim of this scenario is to address specific community-based needs with the content of IO3 and, if possible, to use the CEBMC logic (e.g., use some of its segments) to solve the stated problem.

Whereas scenarios ①, ②, ③, ④ and ⑤ should rather be considered as group tasks, scenarios ⑥ and ⑦ should be considered more as individual tasks.



For scenarios 1, 3 and 4, the trainees will use the original Business Model Canvas (BMC). The BMC is a table with 9 connected segments, which show how all parts of the business work together for success. There is no particular order that has to be followed to fill the canvas (although it is advised to start with customers). In order to fill the canvas, the trainee/trainees should go step-by-step through each of its segments and address the questions. Their purpose is to help to describe the segment as best as possible and include all important aspects.

For detailed explanations of the segments of the BMC you can refer to:

- Alexander Osterwalder's book on BMC:
https://www.academia.edu/8325528/BUSINESS_MODEL_CANVAS
- Isaac Jeffrey's guide on building strong BMC:
<https://isaacjeffries.com/blog/2017/10/14/free-ebook-building-a-strong-business-model;>
<https://static1.squarespace.com/static/568a65ddd82d5eb4328515d6/t/59e17b16f7e0ab03b6500d03/1507949828097/Building+A+Strong+Business+Model.pdf>
- Other internet resources on BMC of your choice

For scenarios 2 and 5, the trainees will use the Community Enterprise Business Model Canvas (CEBMC) developed especially for the ELIE 2.0 project. The CEBMC is based on the original Business Model Canvas (Osterwalder, 2004) and Social Business Model Canvas (Social Enterprise Institute, 2018).

The CEBMC is a table with 12 connected segments, which show how all parts of the business work together for success. There is no particular order that has to be followed to fill the canvas (although it is advised to start with allies and community partners – equivalent to customers from the original Business Model Canvas). In order to fill the canvas, the trainee/trainees should go step-by-step through each of its segments and address the questions. Their purpose is to help to describe the segment as best as possible and include all important aspects.

For detailed explanation of the segments of the BMC you can refer to:

- Alexander Osterwalder's book on BMC: https://www.academia.edu/8325528/BUSINESS_MODEL_CANVAS
- Isaac Jeffrey's guide on building strong BMC: <https://isaacjefries.com/blog/2017/10/14/free-ebook-building-a-strong-business-model/>; <https://static1.squarespace.com/static/568a65ddd82d5eb4328515d6/t/59e17b16f7e0ab03b6500d03/1507949828097/Building+A+Strong+Business+Model.pdf>
- The guide on Social Business Model Canvas from Social Enterprise Institute: <https://socialenterpriseinstitute.co/wp-content/uploads/2018/12/Social-Business-Model-Canvas.pdf>
- Other internet resources on BMC of your choice

For scenario 6 the trainee will use the Community Enterprise Toolkit (IO3) content to address specific business need.

The case study can focus on the following:

- Identify ways to explore target market
- Find most suitable location for the business
- Run promotion and advertising activities
- How a pub can attract more custom in the winter months
- What process could be charged for childminding services
- Etc.

These are just some examples. If, as a community enterprise coach, you're not sure which scenario to take and if the case study identified for the live project is appropriate, you can consult the representative of the ELIE 2.0 project partner.

The aim of this scenario is to address specific business needs with the content of IO3 and if possible to use the BMC logic (e.g. use some of its segments) to solve the stated problem. If the live project covers business activities, such as the examples provided above, then the following segments of BMC could be addressed:

Key Partners	What partners would help in undertaking the business activity? + questions from appropriate segment of the BMC*
Key Activities	What activities needs to be undertaken for the business activity? + questions from appropriate segment of the BMC*
Key Resources	What resources are required for the business activity? + questions from appropriate segment of the BMC*
Value Propositions	What is the value of the business activity perceived by the customers and/or partners? + questions from appropriate segment of the BMC*
Customer Relationships	What relationships needs to be established with customers and/or partners? + questions from appropriate segment of the BMC*
Channels	What channels will be used to reach customers and/or partners? + questions from appropriate segment of the BMC*

Customer Segments	Who would be the customers of the business activity? + questions from appropriate segment of the BMC*
Revenue Streams	What are the sources of funding of the business activity? + questions from appropriate segment of the BMC*

* Not all question may be applicable

For scenario 7 the trainee will use the Community Enterprise Toolkit (IO3) content to address specific community-based need.

The case study can focus on the following:

- Identify ways to raise funds for a local charity organisation or school
- find most suitable location for a social enterprise
- Run promotion and advertising activities for a school
- Identify way how a local community group can expand its membership
- Etc.

These are just some examples. If, as a community enterprise coach you're not sure which scenario to take and if the case study identified for the live project is appropriate, you can consult the representative of the ELIE 2.0 project partner.

The aim of this scenario is to address specific community-based needs with the content of IO3 and if possible to use the CEBMC logic (e.g., use some of its segments) to solve the stated problem.

If the live project covers business activities, such as the examples provided above, then the following segments of CEBMC could be addressed:

Key Allies and Community Partners	What allies and community partners would help in undertaking the community-based activity? + questions from appropriate segment of the CEBMC*
Key Activities	What activities needs to be undertaken for the community-based activity? + questions from appropriate segment of the CEBMC*
Key Resources	What resources are required for the community-based activity? + questions from appropriate segment of the CEBMC*
Community Innovation / Value	What value would the community-based activity bring for the community? + questions from appropriate segment of the CEBMC*
Value Propositions	What is the value of the community-based activity perceived by the allies and community partners? + questions from appropriate segment of the CEBMC*
Community benefits/impact	What are the community benefits resulting from the community-based activity? + questions from appropriate segment of the CEBMC*
Channels	What channels will be used to reach allies and community partners? + questions from appropriate segment of the CEBMC*
Revenue Streams	What are the sources of funding of the community-based activity? + questions from appropriate segment of the CEBMC*

Community reinvestment	How will the raised funds be used within the community (if the community-based activity is connected with fund-raising)?
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* Not all question may be applicable

4. Business Model Canvas (BMC) template (for scenarios 1, 3 and 4)

Key Partners	Key Activities	Value Propositions	Customer Relationships	Customer Segments
<p>Who are our Key Partners? Who are our key suppliers? Which Key Resources are we acquiring from partners? Which Key Activities do partners perform?</p>	<p>What Key Activities do our Value Propositions require? Our Distribution Channels? Customer Relationships? Revenue streams?</p>	<p>What value do we deliver to the customer? Which one of our customer's problems are we helping to solve? What bundles of products and services are we offering to each Customer Segment? Which customer needs are we satisfying?</p>	<p>What type of relationship does each of our Customer Segments expect us to establish and maintain with them? Which ones have we established? How are they integrated with the rest of our business model? How costly are they?</p>	<p>For whom are we creating value? Who are our most important customers?</p>
	<p>Key Resources</p> <p>What Key Resources do our Value Propositions require? Our Distribution Channels? Customer Relationships? Revenue Streams?</p>		<p>Channels</p> <p>Through which Channels do our Customer Segments want to be reached? How are we reaching them now? How are our Channels integrated? Which ones work best? Which ones are most cost-efficient? How are we integrating them with customer routines?</p>	

Cost Structure	Revenue Streams
<p>What are the most important costs inherent in our business model?</p> <p>Which Key Resources are most expensive?</p> <p>Which Key Activities are most expensive?</p>	<p>For what value are our customers willing to pay?</p> <p>For what do they currently pay?</p> <p>How are they currently paying?</p> <p>How would they prefer to pay?</p> <p>How much does each Revenue Stream contribute to overall revenues?</p>

5. Community Enterprise Business Model Canvas (CEBMC) template (for scenarios 2 and 5)

Mission	<p>All social-purpose businesses are on a mission to change society for the better</p> <p>What change are you planning to make in the community?</p> <p>Describe in broad terms how you will pursue your cause and tackle the community problems that matter.</p>			
Implementation		Value	Market	
<p>Key Allies and Community Partners</p> <ul style="list-style-type: none"> Who are the people and groups that you must involve to achieve success? What value will they bring? Who are our key Community Partners? Who are our key Community suppliers? Which Key Resources are you acquiring from community partners? Which Key Activities do community partners perform? Are you going to establish any co-operatives with 	<p>Key Activities</p> <ul style="list-style-type: none"> What Key Activities that your community enterprise must do, deliver, or produce to deliver value to customers and make an impact? What are the mission-critical activities you must pursue? 	<p>Community Innovation / Value</p> <ul style="list-style-type: none"> What solution are you bringing forward to a problem identified within the community? What makes this solution important? What makes your proposed solution more likely to be effective than those that already exist? <p>Think about how you will apply new methods, ideas, or products to solve the identified problem.</p>	<p>Customer/Community Relationships</p> <ul style="list-style-type: none"> What type of relationship will your business establish with customers and the community? How will you maintain/improve this relationship? Which relationships have you already established and which have to be established in the future? 	<p>Customer Segments</p> <ul style="list-style-type: none"> Who are your customers? For whom are you creating value? Who are your most important customers? <p>Focus on your ideal customer(s) and define them clearly.</p>
	<p>Key Resources</p>	<p>Value Propositions</p>	<p>Community benefits/impact</p>	<p>Channels</p>

<p>other community-based enterprises?</p> <p>Think about the funders, partners, suppliers, local businesses that you will work with, anchor institution and others that will influence your success and how you will work with them.</p>	<ul style="list-style-type: none"> • What resources (human, financial, physical, or technological) do you own or will you need to acquire or develop? • Which resources will be most important to achieving success? 	<ul style="list-style-type: none"> • What value do you deliver to the customer/the community? • Which customer needs are you satisfying? • What pains/problems are you solving for your customers/the community? <p>Think about the things you might say to convince your customers to buy from you.</p>	<ul style="list-style-type: none"> • What direct benefits will your business bring to the community? • How can these benefits be measured? • Will there be any indirect benefits for the community? • What immediate vicinity community impact will your business have? • What outside the immediate vicinity community impact will your business have? • What community groups will be impacted by your business? 	<ul style="list-style-type: none"> • What communication, distribution, and sales channels will you use to reach your target customers? • Which ones will be most effective/important/ cost-efficient? • How will you get access to these channels? • How will your Channels be integrated? <p>Focus initially on the channels most likely to bring success.</p>
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Finances

<p>Cost Structure</p> <ul style="list-style-type: none"> • What are the major elements of the cost involved in delivering your work and meeting needs? • What resources and activities are most expensive? • How will you control your main costs? 	<p>Community reinvestment</p> <ul style="list-style-type: none"> • How much surplus do you hope to generate annually and what proportion will be reinvested? • In what ways will you reinvest this surplus in support of your organisation and in service to your community? 	<p>Revenue Streams</p> <ul style="list-style-type: none"> • What are the primary sources of revenues (e.g. earned income, grants, donations etc.) that you will generate to support your work? • Will your business use any community funding mechanism? • How much would each source contribute to our overall income? • For what value are your customers willing to pay? • For what do they currently pay? • How are they currently paying? • How would they prefer to pay?
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		Think about how you will achieve a sustainable balance.
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6. "Case study" live project template (for scenarios 6 and 7)

Name of the organisation	
Description of the areas for improvement /problem (s) to be addressed by the live project	
Outcomes expected by the organisation as a result of the live project implementation	
Time frame of the live project	
Community enterprise toolkit units used to develop the solution	
BMC/CEBMC elements used to develop the solution (if applicable)	
The description of the proposed solution	

7. BMC/CEBMC link with Community Enterprise Toolkit

The table below presents where the trainee/trainees may look for information and external links useful for developing the BMC/CEBMC

BMC/CEBMC segments	Community Enterprise Toolkit units/modules (IO3)
Key Partners / Key Allies and Community Partners	<p>Module 1 - Explore your target market</p> <p>Module 2 - Building business networks (anchor institutions, umbrella organisations, HEIs, B2B)</p> <p>Module 3 - Promotion and advertising</p> <p>Module 3 - B2B marketing</p> <p>Module 3 - Business to Individual Marketing</p> <p>Module 3 - Customer Service</p>
Key Activities	<p>Module 2 - Operational management (purchasing, invoicing, credit control, record keeping, contracts, VAT and taxation, insurance, bookkeeping)</p> <p>Module 2 - Budgeting and forecasting</p> <p>Module 2 - Social Responsibility(sustainability, TBL, Closed Loop Manufacture, circular economy, community wealth building)</p> <p>Module 3 - B2B marketing</p> <p>Module 3 - Business to Individual Marketing</p> <p>Module 3 - Growing your market</p> <p>Module 3 - Customer Service</p> <p>Module 3 - Branding</p> <p>Module 4 - Forward planning, targets, expanding</p> <p>Module 4 - Product and service development /innovation</p>
Key Resources	<p>Module 1 - What business structure should I choose? (sole trader, partnership, co-op etc)</p> <p>Module 2 - Leadership skills</p> <p>Module 2 - Motivation and how to motivate</p> <p>Module 2 - Managing employees</p> <p>Module 2 - Building business networks (anchor institutions, umbrella organisations, HEIs, B2B)</p> <p>Module 3 - Growing your market</p> <p>Module 3 - Customer Service</p> <p>Module 3 - Branding</p> <p>Module 4 - Forward planning, targets, expanding</p> <p>Module 4 - Product and service development /innovation</p> <p>Module 4 - Employment/Labour laws</p>
Community Innovation / Value	<p>Module 1 - Refine your idea</p> <p>Module 1 - Explore your target market</p> <p>Module 1 - Explore existing products and services</p> <p>Module 1 - How to pitch your idea</p> <p>Module 2 - Building business networks (anchor institutions, umbrella organisations, HEIs, B2B)</p>

	<p>Module 2 - Social Responsibility(sustainability, TBL, Closed Loop Manufacture, circular economy, community wealth building)</p> <p>Module 3 - Promotion and advertising</p> <p>Module 3 - B2B marketing</p> <p>Module 3 - Business to Individual Marketing</p> <p>Module 3 - Growing your market</p> <p>Module 3 - Branding</p> <p>Module 4 - Forward planning, targets, expanding</p> <p>Module 4 - Product and service development /innovation</p>
Value Propositions	<p>Module 1 - Refine your idea</p> <p>Module 1 - Explore existing products and services</p> <p>Module 1 - How to pitch your idea</p> <p>Module 2 - Building business networks (anchor institutions, umbrella organisations, HEIs, B2B)</p> <p>Module 2 - Social Responsibility(sustainability, TBL, Closed Loop Manufacture, circular economy, community wealth building)</p> <p>Module 3 - Pricing</p> <p>Module 3 - Promotion and advertising</p> <p>Module 3 - B2B marketing</p> <p>Module 3 - Business to Individual Marketing</p> <p>Module 3 - Growing your market</p> <p>Module 3 - Customer Service</p> <p>Module 3 - Branding</p> <p>Module 4 - Product and service development /innovation</p>
Customer/Community Relationships	<p>Module 1 - Explore your target market</p> <p>Module 2 - Building business networks (anchor institutions, umbrella organisations, HEIs, B2B)</p> <p>Module 3 - Promotion and advertising</p> <p>Module 3 - B2B marketing</p> <p>Module 3 - Business to Individual Marketing</p> <p>Module 3 - Customer Service</p> <p>Module 4 - Forward planning, targets, expanding</p>
Community benefits/impact	<p>Module 1 - Explore existing products and services</p> <p>Module 1 - How to pitch your idea</p> <p>Module 2 - Social Responsibility(sustainability, TBL, Closed Loop Manufacture, circular economy, community wealth building)</p> <p>Module 3 - Promotion and advertising</p> <p>Module 3 - B2B marketing</p> <p>Module 3 - Business to Individual Marketing</p> <p>Module 3 - Growing your market</p> <p>Module 3 - Customer Service</p> <p>Module 4 - Forward planning, targets, expanding</p>
Channels	<p>Module 1 - Explore your target market</p> <p>Module 1 - Location (online/physical)</p> <p>Module 2 - Budgeting and forecasting</p>

	<p>Module 3 - Promotion and advertising</p> <p>Module 3 - B2B marketing</p> <p>Module 3 - Business to Individual Marketing</p> <p>Module 3 - Customer Service</p> <p>Module 4 - Forward planning, targets, expanding</p>
Customer Segments	<p>Module 1 - Explore your target market</p> <p>Module 2 - Building business networks (anchor institutions, umbrella organisations, HEIs, B2B)</p> <p>Module 3 - Promotion and advertising</p> <p>Module 3 - B2B marketing</p> <p>Module 3 - Business to Individual Marketing</p> <p>Module 3 - Growing your market</p> <p>Module 3 - Customer Service</p> <p>Module 4 - Forward planning, targets, expanding</p>
Cost Structure	<p>Module 1 - What funding do you need? How to get funding</p> <p>Module 1 - What business structure should I choose? (sole trader, partnership, co-op etc)</p> <p>Module 2 - Operational management (purchasing, invoicing, credit control, record keeping, contracts, VAT and taxation, insurance, bookkeeping)</p> <p>Module 2 - Budgeting and forecasting</p> <p>Module 3 - Pricing</p> <p>Module 3 - Growing your market</p> <p>Module 3 - Branding</p> <p>Module 4 - Forward planning, targets, expanding</p> <p>Module 4 - Seeking additional Funding</p> <p>Module 4 - Making a case for funding</p>
Community reinvestment	<p>Module 1 - What funding do you need? How to get funding</p> <p>Module 2 - Budgeting and forecasting</p> <p>Module 2 - Building business networks (anchor institutions, umbrella organisations, HEIs, B2B)</p> <p>Module 3 - Growing your market</p> <p>Module 4 - Making a case for funding</p>
Revenue Streams	<p>Module 1 - What funding do you need? How to get funding</p> <p>Module 2 - Operational management (purchasing, invoicing, credit control, record keeping, contracts, VAT and taxation, insurance, bookkeeping)</p> <p>Module 2 - Budgeting and forecasting</p> <p>Module 3 - Pricing</p> <p>Module 3 - Growing your market</p> <p>Module 3 - Branding</p> <p>Module 4 - Forward planning, targets, expanding</p> <p>Module 4 - Seeking additional Funding</p> <p>Module 4 - Making a case for funding</p>

8. IO9 Live project assessment guidelines and templates

The following guidelines and templates can be used to assess the results of trainees' work and provide feedback.

a) Assessment template for BMC (scenario 1, 3 and 4)

Evaluation criteria

The following aspects will be evaluated

Assessment aspect	Description + assessment scale (5 to 1)
Assessment of the segments of the BMC	
Scope	1 - Very few relevant aspects/questions addressing the segments are covered 5 - All relevant aspects/questions addressing the segments are covered
Appropriateness	1 - The content is not appropriate for the selected live project (new or existing business or community-based activity) 5 - The content is appropriate for the selected live project (new or existing business or community-based activity)
Knowledge	1 - The trainee/trainees demonstrate a poor level of knowledge (e.g. based on Community Enterprise Toolkit (IO3) materials) 5 - The trainee/trainees demonstrate a very good level of knowledge (e.g. based on Community Enterprise Toolkit (IO3) materials)
Clarity	1 - The content is not clear and easy to follow 5 - The content is very clear and easy to follow
Assessment of the quality of the BMC	
Ability to provide benefits by the business described in BMC	1 - The business described in BMC is not able to provide stated benefits 5 - The business described in BMC is able to provide stated benefits
Non-imitability of the business model	1 - The business model is easy to imitate 5 - The business model is difficult to imitate
The permanence of the business model	1 - The business model is not likely to be permanent 5 - The business model is likely to be permanent
Ability to generate profit	1 - The business model is not able to generate profit 5 - The business model is able to generate profit
Switching costs *	1 - Nothing holds customers back from leaving the business 5 - Customers are locked in for several years
Recurring revenues *	1 - 100% of sales are transactional 5 - 100% of sales lead to automatically recurring revenues
Earning vs spending *	1 - It is required to incur 100% of the costs before earning revenues 5 - Business model earns 100% of the revenues before incurring costs of goods/services sold

Game-changing cost structure *	1 - Cost structure is at least 30% worse / costs are at least 30% higher than in case of competitors 5 - Cost structure is at least 30% better / costs are at least 30% lower than in case of competitors
Others who do the work *	1 - It is required to incur costs for all the value created in the business model 5 - All the value created in the business model is created for free by external parties
Scalability *	1 - Growing the business model requires substantial resources and effort 5 - The business model has virtually no limits to growth
Protection from competition *	1 - The business model has no barriers, and the business is vulnerable to competition. 5 - The business model provides substantial barriers that are hard to overcome
* Detailed explanation of the criteria can be found here: https://www.strategyzer.com/blog/posts/2015/4/7/why-are-some-business-models-better-than-others	
Additional assessment of the BMC	
There is no scale for this section of the assessment (just a Yes/No question). The aim of this section is to further evaluate the quality of the developed BMC and provide additional feedback to trainee/trainees.	
Overall assessment of the BMC	
Overall level of detail	1 - The overall detail level of the elements is poor (there are many too detailed or too generic elements) 5 - The overall detail level of the elements is very good (there are not many too detailed or too generic elements)
Overall comprehensiveness	1 - Different segments of the canvas are not logically connected with each other 5 - Different segments of the canvas are logically connected with each other
Overall graphical quality	1 - The canvas and its content are low quality in terms of graphic and visibility 5 - The canvas and its content are high quality in terms of graphic and visibility

Assessment questionnaire

BMC segment	Assessment aspect	Assessment scale				
Assessment of the segments of the BMC						
Key Partners	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						

Key Activities	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Key Resources	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Value Propositions	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Customer Relationships	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Channels	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Customer Segments	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5

Comments/feedback:						
Cost Structure	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Revenue Streams	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Assessment of the quality of the BMC						
Quality assessment	Ability to provide benefits by the business described in BMC	1	2	3	4	5
	Non-imitability of the business model	1	2	3	4	5
	The permanence of the business model	1	2	3	4	5
	Ability to generate profit	1	2	3	4	5
	Switching costs	1	2	3	4	5
	Recurring revenues	1	2	3	4	5
	Earning vs spending	1	2	3	4	5
	Game-changing cost structure	1	2	3	4	5
	Others who do the work	1	2	3	4	5
	Scalability	1	2	3	4	5
	Protection from competition	1	2	3	4	5
Comments/feedback:						
Additional assessment of the BMC						
All BMC segments are used or have at least been considered	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
Each customer segment is addressed by one or more value proposition	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			

A channel supports a value proposition-customer segment set	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
If present, a customer relationship targets a customer segment	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
Each value proposition is produced/delivered by a key activity, a key partner or offers a key resource	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
Key resources or key partners support an activity	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
At least one revenue stream is generated from a value proposition-customer segment set	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
Major fixed costs are listed	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
Major variables costs are listed	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
There are no orphan elements: all elements are connected to another element	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
Comments/feedback:						
Overall assessment of the BMC						
Overall assessment	Overall level of detail	1	2	3	4	5
	Overall comprehensiveness	1	2	3	4	5
	Overall graphical quality	1	2	3	4	5
Comments/feedback:						

b) Assessment template for CEBMC (scenario 2 and 5)

Evaluation criteria

The following aspects will be evaluated

Assessment aspect	Description + assessment scale (5 to 1)
Assessment of the segments of the CEBMC	
Scope	1 - Very few relevant aspects/questions addressing the segments are covered 5 - All relevant aspects/questions addressing the segments are covered
Appropriateness	1 - The content is not appropriate for the selected live project (new or existing business or community-based activity) 5 - The content is appropriate for the selected live project (new or existing business or community-based activity)
Knowledge	1 - The trainee/trainees demonstrate a poor level of knowledge (e.g. based on Community Enterprise Toolkit (IO3) materials) 5 - The trainee/trainees demonstrate a very good level of knowledge (e.g. based on Community Enterprise Toolkit (IO3) materials)
Clarity	1 - The content is not clear and easy to follow 5 - The content is very clear and easy to follow
Assessment of the quality of the CEBMC	
Ability to provide benefits by the business described in CEBMC	1 - The business described in CEBMC is not able to provide stated benefits 5 - The business described in CEBMC is able to provide stated benefits
Non-imitability of the business model	1 - The business model is easy to imitate 5 - The business model is difficult to imitate
The permanence of the business model	1 - The business model is not likely to be permanent 5 - The business model is likely to be permanent
Ability to generate profit	1 - The business model is not able to generate profit 5 - The business model is able to generate profit
Switching costs *	1 - Nothing holds customers back from leaving the business 5 - Customers are locked in for several years
Recurring revenues *	1 - 100% of sales are transactional 5 - 100% of sales lead to automatically recurring revenues
Earning vs spending *	1 - It is required to incur 100% of the costs before earning revenues 5 - Business model earns 100% of the revenues before incurring costs of goods/services sold
Game-changing cost structure *	1 - Cost structure is at least 30% worse / costs are at least 30% higher than in case of competitors 5 - Cost structure is at least 30% better / costs are at least 30% lower than in case of competitors
Others who do the work *	1 - It is required to incur costs for all the value created in the business model

	5 - All the value created in the business model is created for free by external parties
Scalability *	1 - Growing the business model requires substantial resources and effort 5 - The business model has virtually no limits to growth
Protection from competition *	1 - The business model has no barriers, and the business is vulnerable to competition 5 - The business model provides substantial barriers that are hard to overcome
* Detailed explanation of the criteria can be found here: https://www.strategyzer.com/blog/posts/2015/4/7/why-are-some-business-models-better-than-others	
Additional assessment of the BMC	
There is no scale for this section of the assessment (just a Yes/No question). The aim of this section is to further evaluate the quality of the developed BMC and provide additional feedback to trainee/trainees.	
Overall assessment of the BMC	
Overall level of detail	1 - The overall detail level of the elements is poor (there are many too detailed or too generic elements) 5 - The overall detail level of the elements is very good (there are not many too detailed or too generic elements)
Overall comprehensiveness	1 - Different segments of the canvas are not logically connected with each other 5 - Different segments of the canvas are logically connected with each other
Overall graphical quality	1 - The canvas and its content are low quality in terms of graphic and visibility 5 - The canvas and its content are high quality in terms of graphic and visibility

Assessment questionnaire

BMC segment	Assessment aspect	Assessment scale				
Assessment of the segments of the CEBMC						
Key Allies and Community Partners	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Key Activities	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						

Key Resources	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Community Innovation / Value	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Value Propositions	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Customer/Community Relationships	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Community benefits/impact	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Customer Segments	Scope	1	2	3	4	5

	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Channels	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Cost Structure	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Community reinvestment	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Revenue Streams	Scope	1	2	3	4	5
	Appropriateness	1	2	3	4	5
	Knowledge	1	2	3	4	5
	Clarity	1	2	3	4	5
Comments/feedback:						
Assessment of the quality of the CEBMC						
Quality assessment	Ability to provide benefits by the business described in CEBMC	1	2	3	4	5
	Non-imitability of the business model	1	2	3	4	5

	The permanence of the business model	1	2	3	4	5
	Ability to generate profit	1	2	3	4	5
	Switching costs	1	2	3	4	5
	Recurring revenues	1	2	3	4	5
	Earning vs spending	1	2	3	4	5
	Game-changing cost structure	1	2	3	4	5
	Others who do the work	1	2	3	4	5
	Scalability	1	2	3	4	5
	Protection from competition	1	2	3	4	5
Comments/feedback:						
Additional assessment of the CEBMC						
All CEBMC segments are used or have at least been considered	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
Each customer segment is addressed by one or more value proposition	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
A channel supports a value proposition-customer segment set	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
If present, a customer/community relationship targets a customer segment	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
Each value proposition is produced/delivered by a key activity, a key ally/community partner or offers a key resource	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
Key resources or key ally/community partners support an activity	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
At least one revenue stream is generated from a value proposition-customer segment set	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
Major fixed costs are listed	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
Major variables costs are listed	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
There are no orphan elements: all elements are connected to another element	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable			
Comments/feedback:						
Overall assessment of the CEBMC						
Overall assessment	Overall level of detail	1	2	3	4	5

	Overall comprehensiveness	1	2	3	4	5
	Overall graphical quality	1	2	3	4	5
Comments/feedback:						

c) Assessment template for case study (scenario 6 and 7)

Evaluation criteria

The following aspects will be evaluated

Assessment aspect	Description + assessment scale (5 to 1)
Assessment of the case study	
Scope	1 - Very few relevant aspects/questions addressing the Community Enterprise Toolkit (IO3) are covered 5 - All relevant aspects from the Community Enterprise Toolkit (IO3) are covered
Appropriateness	1 - The content is not appropriate for the selected live project 5 - The content is appropriate for the selected live project
Knowledge	1 - The trainee/trainees demonstrate a poor level of knowledge (e.g. based on Community Enterprise Toolkit (IO3 materials) 5 - The trainee/trainees demonstrate a very good level of knowledge (e.g. based on Community Enterprise Toolkit (IO3 materials)
Clarity	1 - The content is not clear and easy to follow 5 - The content is very clear and easy to follow

Assessment questionnaire

Assessment aspect	Assessment scale				
Scope	1	2	3	4	5
Appropriateness	1	2	3	4	5
Knowledge	1	2	3	4	5
Clarity	1	2	3	4	5

Additionally if the case study will use some of the BMC/CEBMC elements, the community enterprise coach should use the respective parts of the BMC (for scenario 6) or CEBMC (for scenario 7) assessment questionnaire.