Guideline for Field Research

1. Identifying Social Enterprises (SEs)

There are several options to identify a potential interview partner for your case study:

- Research the regional and national media (newspaper, magazines, TV, etc.) for articles/reports on SEs.
- Research the internet for SEs in your region/country using keywords such as “social enterprise”, “social business”, “social impact”, etc. + the name of the region/country.
- Research online directories and databases of SEs in your region, e.g.
  - Ashoka network https://ashoka.org/regions/europe
  - betterplace.org: https://www.betterplace.org/en
  - European Commission – European social enterprises: http://ec.europa.eu/social/main.jsp?langId=en&catId=89&newsId=2149&furtherNews=yes
  - Kiva: https://www.kiva.org/
  - Schwab Foundation: http://www.schwabfound.org
  - Skoll Foundation: http://skoll.org/community/awardees/
  - Social Enterprising Europe: http://socialbiz.eu/european-examples/
- Talk to people (family, friends, teachers, colleagues, etc.) whether they know (and maybe even have contact to) SEs in your region.

2. Selecting Social Enterprises

Keep the following characteristics of social enterprises in mind for selecting appropriate ventures:

- **Explicit social aims** – There is a clear social purpose which drives the organisation or business. This explicit social aim is core to the activities, rather than incidental.
- **Commercial activity** – The venture will aim to derive a significant portion of its income from commercial activities such as the sale of goods and services to a market. The organisation may still however generate income from a variety of other sources such as grants etc.

In order to select which SE you are contacting first, you might consider the following aspects:

- Does the SE work on a similar challenge as your group? (this is not mandatory for the case study, but it might help to learn how other people have approached the specific challenge)
- Does the SE have a homepage with detailed information on the SE? (again, this is not mandatory, but it will help you with working on your case study)
- Is the SE easy to reach both in terms of communication (phone) and travel distance?
- Which SE do you personally find most interesting?
- Have a look at the Google Doc-List to make sure that the company has not been contacted yet by one of your fellow students

3. Contacting Social Entrepreneurs

Before you contact the SEs, make sure you have the founder(s) name and, if available, his/her direct contact information (if not, you need to be put through by the operator in the SE)

- State your name and your affiliation (i.e. the local university you are enrolled).
- State the reason for the call (e.g. “If possible, I would like to have an interview with you in order to learn more about your SE”).
- Give a short introduction on the project and the online seminar.
- Briefly explain about the interview, i.e. the time frame (ca. 30-45 minutes) and the form of interview (personal interview) and that the information of the interview will be used in the online seminar to discuss how SEs approached social challenges in the various regions.
- State that a summarized version of the case study will be published online on the project website – provided that the SE agrees to publish the information.
- If the SE does not wish the information to be published, excerpts of the interview will only be used within the seminar group.
- Ask for further questions and if the SE founder agrees to participate in the case study (if not, do not persist and contact another SE).
- If the founder asks for the interview questionnaire, you can send the document to him/her in order to help his/her decision whether to take part in the interview or not.
- Enter the SE’s name and the status (interview / no interest) in the Google Doc-List to make sure that your fellow students do not contact the same organization twice.

4. Making Appointments

If the SE founder agreed to participate in the case study

- Make an appointment for the interview
- Make sure you have the correct name and email address of the interviewee
- Write an email with the summary of the information you have given before (background and purpose of the project), the appointed time and your contact information
- Send an outline of the questionnaire so that SE founders can prepare for the interview, if they wish to
- Attach the informed consent form and ask the interviewee to sign the document before the interview takes place

5. Conducting the Interview

Prepare well before you physically conduct the interview

- Research information on the SE on the internet and other media to be informed about its background and activities.
- Make sure that you arrive in time and that you are well-dressed, you are representing your local university.
- Make sure you have taken all relevant documents with you.

Starting the interview

- Introduce yourself and thank the interviewee for participating in the case study.
- Briefly explain about the objectives of the interview (what are your learning objectives?), the interview procedure and the expected time frame (ca. 30-45 minutes).
- Briefly explain what happens with the information and ask for the signed informed consent form.
- Ask whether you can use a voice recorder (if you have one) to record the interview.

During the interview

- **Be neutral**. Do not use any suggestive questions or try to answer the questions yourself.
- **Let the interviewee talk**. You more or less stay at the background (90/10 rule).
- Give the interviewee time to gather his/her thoughts. Don’t rush in with a supplementary question to fill the silence.
- There is no need to answer the questions in the interview chronologically. If the interviewee provides information on a question, which you would have asked at a later stage, put down the notes on the respective question. Be sure you are familiar with the questionnaire to quickly find the relevant section.
- Write down specific **quotes** of the interviewee, these phrases are often very helpful in explaining specific situations / opinions / etc. in your case study.
- Be aware of the time frame and respect it.

After the interview

- Thank the interviewee.
- Explain that the summarized version of the case study will be sent to the interviewee within the next weeks and that he/she will be asked whether this information can be published on the project website or not. Again ensure, that no information will be published without the interviewee's agreement.
- After leaving the interviewee, make **notes** about major insights and your observations and impressions during the interview as soon as possible after the interview took place.

6. Analyzing the Data

- Use the case study template to summarize the information from the interview. Concentrate on the main aspects.
- In your group, choose **one** of the following **lead questions** to compare your cases:

  a. Do the SEs have a clear social vision and mission and how do they communicate their vision and mission?

  b. How are the relationships with internal and external stakeholders developed and maintained by SEs?

  c. How and for whom do SEs measure their social impact?

  d. Which strategies do the SEs pursue to cope with current challenges?

  e. How did specific incidents in the founders‘ professional career and private life affect their decision to found a SE?

  Note: Your group can also agree to use another lead question that you define within your group (provided that this question can be answered on the basis of the questionnaire)

- Discuss similarities and differences of the local cases with respect to the selected lead question. Reflect on what differentiates the SEs and in how far local conditions of the respective countries might be affecting them.

7. Reporting:

- **Group work** (deadline: 10 May 2016):
  - Present your findings on the comparison of the local cases to the plenary (20 minutes presentation + 10 minutes discussion).
- **Individual work** (deadline: 24 June 2016)
  - Finalize the case study template for online publication. Send the case study template and the publication release form to the interviewee for signature.
  - Write a brief report (ca. 5 pages) in which you summarize the information of your local case. You may concentrate on specific aspects of the case study. Attach supplementary information (e.g. graphical material) if available.
- **Follow-up with the SE**:
  - Write a short email or a letter to the interviewed person. Again thank the interviewee for his/her contribution and briefly explain what happened after the interview and what you and your group learnt from the information.