2nd Edition Strategic and Financial Planning Programme

Strategic planning and impact management
Financials for impact
Business plan & Investment assessment
Talent Management

IES SOCIAL BUSINESS SCHOOL

Pre-recorded videos
Live sessions
Individual follow-up sessions
October to November 2022
The EIB Institute is organising the 2\textsuperscript{nd} edition of an exclusive training course for the SIT Alumni Network in partnership with \textbf{IES-Social Business School (IES-SBS)}, the first business school focused on Social Innovation.

\begin{itemize}
  \item \textbf{1. Strategic planning and impact management}
    \begin{itemize}
      \item Strategic planning for hybrid organizations (process and decision making)
      \item Performance dashboards to track KIs and KPIs
    \end{itemize}
  \item \textbf{2. Financials for impact}
    \begin{itemize}
      \item Foundations and business modelling for hybrid organizations
      \item Cash flow management and forecast
      \item Economic performance
    \end{itemize}
  \item \textbf{3. Business plan & Investment assessment}
    \begin{itemize}
      \item Business plan structure and components
      \item Investment evaluation and alignment with growth strategy
      \item Investment raise
    \end{itemize}
  \item \textbf{4. Talent Management}
    \begin{itemize}
      \item Talent recruitment, retention and management (processes and incentives)
      \item Learning, culture fit and incentives
    \end{itemize}
\end{itemize}
1. Pre-recorded videos & Materials
- The participants will have access to the pre-recorded sessions and materials;
- Tasks will be assigned to each team to be delivered before the live session.

**Duration:** 1 hour per module

2. Live Sessions
- The live session will allow the participants to discuss their learnings, roadblocks and achievements;
- The participants will also be encouraged to bond with each other through sharing.

**Duration:** 2 hours per module

3. One-to-one follow-up sessions
- Each team will have an allocated mentor according to their needs;
- The mentors will support the ventures through a customised approach.

**Duration:** 1 hour per team/Module

[https://ies-sbs-bei.teachable.com/](https://ies-sbs-bei.teachable.com/)
## Schedule

<table>
<thead>
<tr>
<th>Module</th>
<th>Access to pre-recorded videos and material (1 hour per module)</th>
<th>Live session - Zoom (Wednesday) 16h00 – 18h00 (CET) - (2 hours per module)</th>
<th>Individual follow-up sessions (November 2022 to March 2023)</th>
<th>Total time required (in hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Strategic planning and impact management</td>
<td>3 Oct</td>
<td>12 Oct</td>
<td>1 hour per module/per project</td>
<td>4</td>
</tr>
<tr>
<td>2. Financials for impact</td>
<td>12 Oct</td>
<td>26 Oct</td>
<td>1 hour per module/per project</td>
<td>4</td>
</tr>
<tr>
<td>3. Business plan and investment assessment</td>
<td>26 Oct</td>
<td>09 Nov</td>
<td>1 hour per module/per project</td>
<td>4</td>
</tr>
<tr>
<td>4. Talent management</td>
<td>9 Nov</td>
<td>23 Nov</td>
<td>1 hour per module/per project</td>
<td>4</td>
</tr>
</tbody>
</table>

Total: 16 hours
TEAM

Carlos Azevedo
CEO @ IES-SBS

Carlos is the President of the Board of Directors and CEO at IES-Social Business School, he is the founder and former president of the Board of Directors of ELSIDER-PORTUGAL - National Network for Civil Society Leaders - and former Board member at EUCLID Network - European Network for Civil Society Leaders. He worked as a research associate at INSEAD. He was also a research assistant at the Católica University in Portugal and the former CEO of UDIPISS-PORTO, an umbrella group for more than 500 Nonprofit organizations in the country. He is the author of several books on Social Innovation such as “Managing Nonprofit Organizations - the challenge of social innovation”, “The Social Entrepreneur’s Guide to Changing the World” and “Governance Manual for Nonprofit Organizations - the leadership challenge of social innovation”. Carlos holds a BSc in Economics and is a PhD candidate in Economics at the University of Minho – Portugal. Carlos also teaches the elective course on Social Entrepreneurship at the MBA programme of INSEAD in Fontainebleau. Carlos is an Associate Professor at Catolica Porto Business School.

Frederico Fezas Vital
Community and Communication Strategist @ IES-SBS

Frederico Fezas Vital is an Adjunct Professor of Social Entrepreneurship in Católica-Lisbon School of Business & Economics. Frederico graduated in Law at Universidade Católica and has also post-graduated in Marketing Management at ISG (both in Lisbon), attended a 2 years Executive Program in Project & Leadership Management at INSEAD, IIES e Heriot Watt and completed an intensive Bootcamp for Positive Leadership at the UN University, in Costa Rica. He was Bootcamp leader, Trainer and Mentor in more than 25 Social Entrepreneurship Bootcamps powered by Insead in Portugal and 3 in INSEAD (2017/2019).

In 2009 Frederico received the Citizenship Award by Rádio Clube Português. In 2011 his impact venture, created in 2007 - Terra dos Sonhos - was recognized as a High Potential Social Entrepreneurship Project by the Map of Social Innovation and Entrepreneurship, developed by IES-SBS and IPA/V in Portugal. In 2016 he started working with Ashoka Portugal, as the responsible for Education Programs and, in 2017, as Director of Changemaker Skills for Portugal. Since the 1st November 2017, he is the new CEO for Junior Achievement Portugal, the biggest organization in the world for Education in Entrepreneurship, with a global impact in more than 10 million students spanning 120 countries. He also is an active member of several projects and organizations in the field of Social Innovation, in different clusters of societal problems such as Education, Regenerative Ecosystems and Emotional Health (SDG’s cluster – People Harmony and Eco Harmony).

Nuno Victor
CFOO @ IES-SBS

Nuno is the co-author of “RDSS - Sustainable Social Initiatives Development Framework”, before joining the IES team Nuno worked 9 years at a northern non-profit organization as Head of Department of Innovation and Sustainability, where, among others, projects like “Need – Tailored services to people and organizations” and “CSE Social Incubator” were born. Also during this period he was an ISO 9001:2008 Quality Management Auditor, consultant for an EQUAL initiative project (European Social Fund), and supported several social sector organizations in the Oporto district as business and management consultant. Holding a degree in Business Administration from the Portuguese Catholic University – Oporto, he is currently a member of the IES management team and responsible for operations and finances as CFOO.
IES - Social Business School is the first business school focused on Social Innovation. It aims to inspire and build capacity of impact agents who solve neglected and important societal problems through scalable, innovative and sustainable solutions.

WHERE ARE WE

IES-Social Business School (IES-SBS) is a non-profit association co-founded in 2008, with the support of the INSEAD Portugal Alumni Association. IES-SBS established a partnership with INSEAD in 2011 to deploy social entrepreneurship programs in Portuguese. It has become one of the first schools to focus on impact and social innovation.

**Portugal:** Where we have started our activity back in 2008 – headquarters in Cascais and branch in Porto;

**Mozambique:** We have made our first international step in 2011 to Mozambique;

**Europe, North Africa, Middle East e Asia:** We deepened our internationalization process in 2015 in Europe and in Maghreb region. In 2018 we reached Asia through our partnership with the Asia Business Alliance.