MAKING OUR ECONOMY MAKE SENSE

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An action-research project

[VISES]

Let's work together and amplify the IMPACTS OF SOCIAL entrepreneurship

Interreg France-Wallonie-Vlaanderen
UNION EUROPÉENNE EUROPESE UNIE
VISES

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SUMMARY

A notebook written by Sybille Mertens and Charlotte Moreau of the CES of the ULg.

Introduction
THE GENESIS OF THE VISES PROJECT

1 A CHANGING CONTEXT

As with any organisation, social companies are constantly interacting with the world around them. There have been three major changes recently which have led to the increasing importance and public awareness of social impact evaluations.

Firstly, public financing initiatives for companies in the social economy has become more contract-oriented (financing is dependent on tangible results) and there is greater competition for this financing (it depends on the company's performance). We are gradually moving away from a tutelage-based financing programme to an approach which focuses on the positions made available by social companies, helping reduce the rate of unemployment and exclusion for the least qualified (in an effort to regulate integration into the workplace). Recently, demand has been changing too. Companies are now competing with each other, giving their users the freedom to choose among them as service providers (a move towards market-based regulation) (Defourny et al., 2010).

Secondly, the « social company » concept (much in fashion these days) no longer automatically meets the needs of companies in the social economy. Thirty years ago, there was a certain level of consensus around the existence of a third sector (not public, not profit) which we called the « social economy ». Since the late 1990's, however, a slew of new concepts has emerged with social companies, social entrepreneurship, high-impact companies and B-Corps (Benefit Corporations)[1].

Some of these companies have maintained a link between these new concepts and the traditional notion of the social economy (the EMES Network School). Others, however, have helped further the idea that the boundaries between the various types of organisation are more mobile (« blurring boundaries », see Alter, 2006, among others), and that we can and should no longer define a social company according to the terms of the traditional legal statuses and frameworks. As discussed by Alix and Baudet (2014), we are no longer focusing on how exactly these organisations work - we have entered a time when only their « results » matter. From this, we come to the notion of the social impact itself. This concept has gradually become more and more important, and seems to be a useful way of addressing all of these disparate phenomena.

Thirdly, private finance has since entered the social economy, thanks to the arrival and development of Impact Investing and Venture Philanthropy. Impact Investing brings together backers from international finance, investment banks, foundations and new philanthropists who are looking to construct a portfolio of initiatives with, potentially, a high social and financial return. These groups do not generally distinguish between the type of organisation or structure behind these initiatives.

(1) Founded in 2006 in the United States, the B-Corp community brings together companies looking to make (or reinstate) their Corporate Mission a wholesale part of their identity. These are for-profit companies who are looking to move forward and demonstrate their positive social impact, becoming for-purpose companies whose overall performance is evaluated every 3 years. Source: https://bcorporation.eu/about-b-lab/country-partner/France.

Venture Philanthropy is used to describe a new approach to philanthropy, in which private sponsors act like investors. They provide resources (donations, loans, capital investment) alongside oversight and management support for the companies they invest in. These new philanthropists « *apply capital-risk type methods to social entrepreneurship and place an emphasis on the social return on investment* » (Sibille, 2009: 279).

Whether they define themselves as Impact Investors or Venture Philanthropists, the approach used by these new private backers requires impact measurement tools - without these, they are unable to evaluate their social return on investment.

The situation is changing, and the concept of social impact is gaining ground - both as a way of qualifying and defining social companies (a social company could now more accurately be defined as a social impact company) and of proving their effectiveness (what counts is the impact). As with all social organisations, each company working in the social economy is expected to define itself as an impact company and demonstrate the results generated by their actions.

The new generation of financiers has clearly expressed their expectations through certain consultants and certain business schools (which are developing and promoting standardised evaluation tools; for example, see the SROI method, popularised by the ESSEC in France), and are relaying them through supra-national institutions (G8, OECD, the European Commission). Public backers are also coming around to this point of view, even seeing it as a potential tool to develop new modes of public-private partnerships such as « Social Impact Bonds ».

THERE ARE NOW TWO KEY ISSUES FOR COMPANIES IN THE SOCIAL ECONOMY, WHICH NEED TO MEET THESE SOCIAL IMPACT EVALUATION REQUIREMENTS (IN ORDER TO DEFEND OR OBTAIN THEIR OWN LEGITIMACY) AND SECURE THEIR ACCESS TO RESOURCES (FINANCIAL, HUMAN, KNOWLEDGE, ETC.).

2 AN **ACTION-RESEARCH** PROJECT WHICH RESPONDS TO THE GROWING DEMAND FOR SOCIAL IMPACT

WHAT ARE THE **RISKS** OF EVALUATING YOUR IMPACT?

Professional federations within the social economic sector are well aware of what their environment demands of them, and ensure that their member companies are too. However, there are risks for the SE sector (both federations and companies) in just meeting these expectations: the risk of isomorphism[2], or the potential bias in selecting the most « quantifiable » companies - those whose impact is most easily verifiable over the short term, or those who provide the best combination of social and financial return. There is also the risk of a democratic deficit when impact evaluation is almost entirely spearheaded by private groups, even though this evaluation could have a huge influence on the choices made by our societies.

(2) According to DiMaggio & Powell (1983), isomorphism is a « process which forces one unit within a population to resemble the other units in the population faced with the same environmental conditions ». In the case we're looking at now, companies in the social economy could end up all resembling what, to them, looks like a winning model. We would see them trying to imitate the practices of companies who seem to be ahead of the game (Enjolras 1996).

And although the SE has demonstrated a certain resistance to these practices, there does not yet seem to be a clear position on the matter. If companies in the social economy don't take part in the debate, however, they will be unable to defend their unique practices and actions or demonstrate that they play a key role in the companies' impact. By making more progress to demonstrate and highlight their social impact, the social economy will be able to better identify the scope of what is demanded of them and respond to it in a way that reflects the needs and realities of the various parties concerned. To achieve this, the various French and Belgian SE federations decided to implement a four-year project (2016-2019) under the aegis of the European Interreg programmes, a project known as VISES *(Promoting the Social Impact of Social Entrepreneurship).*

Among the various other groups and structures working on the issue of social impact evaluation, the VISES project differs from the scientific studies and measurement/evaluation tools proposed by consultants through its positioning as an action-research project. But what do we mean by an action-research project? We'll go into further detail later, but to start, just bear in mind that action-research is a scientific process located « *at the crossroads between a desire for change and a need for research* » (Lewin, 1947). We can develop our knowledge through change and through action, while at the same time enhancing the effects of our actions by increasing our knowledge.

3 THE PROCESS

Following this four-year process, we need to look back at the methodological choices implied by this action-research framework, and the lessons we can draw from it. The underlying theme was developed and detailed in a project booklet by researchers at the Social Economy Centre at the University of Liège (Belgium), based on discussions held within the project's research group[3]. The actual verbatim accounts used to support or illustrate the subject primarily stemmed from a group meeting held in June 2019, which focused on discussing group feedback within the action-research process. These verbatim records will be coded (GR*).

This booklet was used to justify the methodological choices made **(section 1)**, describe their real-world implementation **(section 2)** and analyse the consequences **(section 3)**. It is aimed at four specific groups: the project partners, the impact community, the scientific community, and the wider community of project backers.

First and foremost, this document is intended for an internal audience. It aims to provide the organisations which participated in the project (in addition to the various backers) with feedback about the project they'd been working on for the past years. Beyond the results of the project themselves, it is important to understand the dynamic - both because it generates certain results itself, and because action-research is a learning process which could potentially be useful in other contexts too. All of the partners involved need to take a step back and learn the right lessons. As such, the booklet is useful for organisations in the wider social economy, who could be motivated to participate in this sort of process - alongside scientists, for whom research is the main goal.

The contents of this document could interest scientists too, for two reasons. Firstly, if the social impact evaluation falls into their investigative field, they could use this information to shed light on how groups in the social economy in France and Belgium could begin to position themselves. Secondly, if they are primarily interested in the methodology of the study, they will find information that could help them further their understanding of the dynamics involved in action-research projects.

(3) As we'll see in the VISES research-action project diagram, the group sought to bring together a series of academic researchers (called researchers) and active researchers (called actors).

Finally, this document is also intended for the people and organisations which form what we can now call the impact community. It will help shed light on a subject of which that they probably have a good technical grasp, but for which they have precious little dialogue with companies and their networks. These people, however, are in the front line of performance evaluation. They have the knowledge that we need to mobilise if we are to address the issues currently facing the social economy. This document is a testament to the benefits of a participative and democratic approach to issues facing society. And indeed, this last aspect could well interest the various backers of the project, as well as the institutions which finance social innovation programmes.

SECTION 1 : **Choosing an action-research approach**

WHY CHOOSE ACTION-RESEARCH, RATHER THAN THE TRADITIONAL PATHS OF ACTION OR RESEARCH?

The demands of the environment and the absence of any single voice representing the SE in this debate led the VISES project team to make a strategic decision. They chose **action-research**. How did they defend this choice? What were the triggers? In other words, why didn't they choose the more traditional paths of action or research alone? Lastly, what can we learn from the choice of methodology selected by the participants in the social economy?

1 WHY NOT A STRAIGHT **ACTION PROGRAMME**?

Choosing a straight action programme would imply that the people behind the programme knew what actions needed to be implemented, and had drawn up a plan to do so. Three things prevented the VISES project from going down this route: a lack of knowledge and understanding of the issues by the people involved, the lack of social impact evaluation tools currently in their possession and, lastly, the existence of major demands imposed by the notion of impact itself.

Firstly, the issue of social impact evaluations is complex, and raises a number of major issues. The major players in the social economy (federations, network leaders and companies) don't necessarily have a firm grip on the concepts used. The vocabulary is not always fully clear or wholly understood, so the risk of misunderstanding is high. They fear that there will be considerable technical difficulties and are not sure they have a proper idea of the opportunities and risks involved in the social impact evaluation process. They ask themselves a lot of questions and can end up with a combative or even hostile attitude towards the process. The questions are multiple: does impact mean change? Do SE companies really have to measure their impact? Should they use standardised or ad hoc methods? Does impact not mean being able to sell your services? Is this going to increase the competition? Will it not take organisations away from their core missions?

Secondly, even if companies are in contact with a range of social impact evaluation tools, it's not always easy for them to integrate and use them (for more on appropriation, see Baudet 2019). The language used is not always entirely clear; random evaluation methods (which get a lot of support from the scientific community) seem extremely complex to implement, while the SROI type methods appear costly and reductive. The participants in the SE have difficulty understanding the tools and lack the knowledge to confidently choose one or other approach.

Lastly, the process is further complicated by a lack of clarity in the recommendations given: there is no set standard, and there is a certain amount of controversy about the area of impact. The issue of impact evaluation concerns a wide range of groups, all of which have their own interests. Some of them support the use of standardised methods, while others are automatically suspicious of them. Social federations and companies are pulled in different directions by these diverging positions, seeing contradictory demands and requirements emanating from them.

For these three reasons, a purely action-based approach would be premature: social federations and companies remain hesitant and are unsure of what would be in their interests. Some of them are even resistant to the approach.

2 SO WHY NOT A **RESEARCH PROJECT** INSTEAD?

Choosing a research project implies that there is a clear research question in place. By mobilising the requisite scientific expertise, the groups involved would believe that they'd get answers, and that this new knowledge would make it easier for them to make decisions. Three things prevented the VISES project from going down this route: the participants' dissatisfaction with their previous experiences, the risk of divergence between the research results and their implementation, and the desire for something that these participants can take on board and use.

Firstly, the federations and companies in the SE have already contributed to research projects which focused on the issue of social impact evaluation (e.g. The SECOIA project in Wallonia, see Moreau and Mortier, 2017). While they acknowledge that this research helped clear up certain issues or better understand certain aspects specific to the SE, they lament the fact that they did not help build a clear position for the SE in terms of the social impact debate, and did not make it any easier to implement concrete impact-focused processes within social companies. They had great expectations about both of these points, and clearly expressed a « need for action ». More generally, they considered that « *researchers sometimes take a lot (of data and time) while giving little back, and it's not a good thing* » (GR*).

Moreover, the federations in the SE are fully aware that research takes time and that the situation is urgent. They don't have the luxury of waiting for a research project to reach a conclusion before deciding on the actions they need to take. They also know from experience that there will always be a lag between the research recommendations and their implementation. This may simply be the time needed to take the information on board, but it can also be reticence from the people involved, who react poorly to having the initiatives thrust upon them (by researchers in this case, or by regulations elsewhere).

In general, social federations are reluctant to let researchers develop a solution on their own. They believe that the problem facing them is primarily political in nature. As such, they want to play a greater role in the debate and have a greater impact on their own outcome. For them, progress on the issue of social impact evaluation would only be possible if they played an active role in the research process, and could then use that as a basis from which they could make the best possible decisions.

As a result, the federations behind the VISES project preferred to keep the question in-house and decided to use European financial backing to increase their knowledge and options regarding this strategic issue. For them, it was about presenting themselves as key players in the social impact evaluation, both externally (in dialogues with other types of players: backers, consultants, training organisations) and internally (to adapt the right tools and meet the growing needs of their members, the companies in the social economy).

3 SO WHY ACTION-RESEARCH?

Because neither a research project nor an action project seemed capable of meeting the needs of the companies operating in the social economy. Action is paralysed by a lack of knowledge, while research is incapable of providing relevant action in a short enough time-frame. We needed to act to resolve a problem while simultaneously generating new knowledge - this would both let them stand up to certain demands and allow them to create their own solutions.

It was therefore only natural for the project teams to choose an action-research project - this was particularly well-suited to a task in which the participants wanted to generate immediately useable knowledge and weigh in on the debate and/or make it easier to change things for the better.

We can also define action-research as a scientific process located « at the crossroads between a desire for change and a need for research » (Lewin, 1947). It is a « *democratic, participation-led process, designed to produce practical knowledge by combining action and thought, theory and practice, under the aegis of joint participation.* » (Reason & Bradbury, 2001, p. 1).

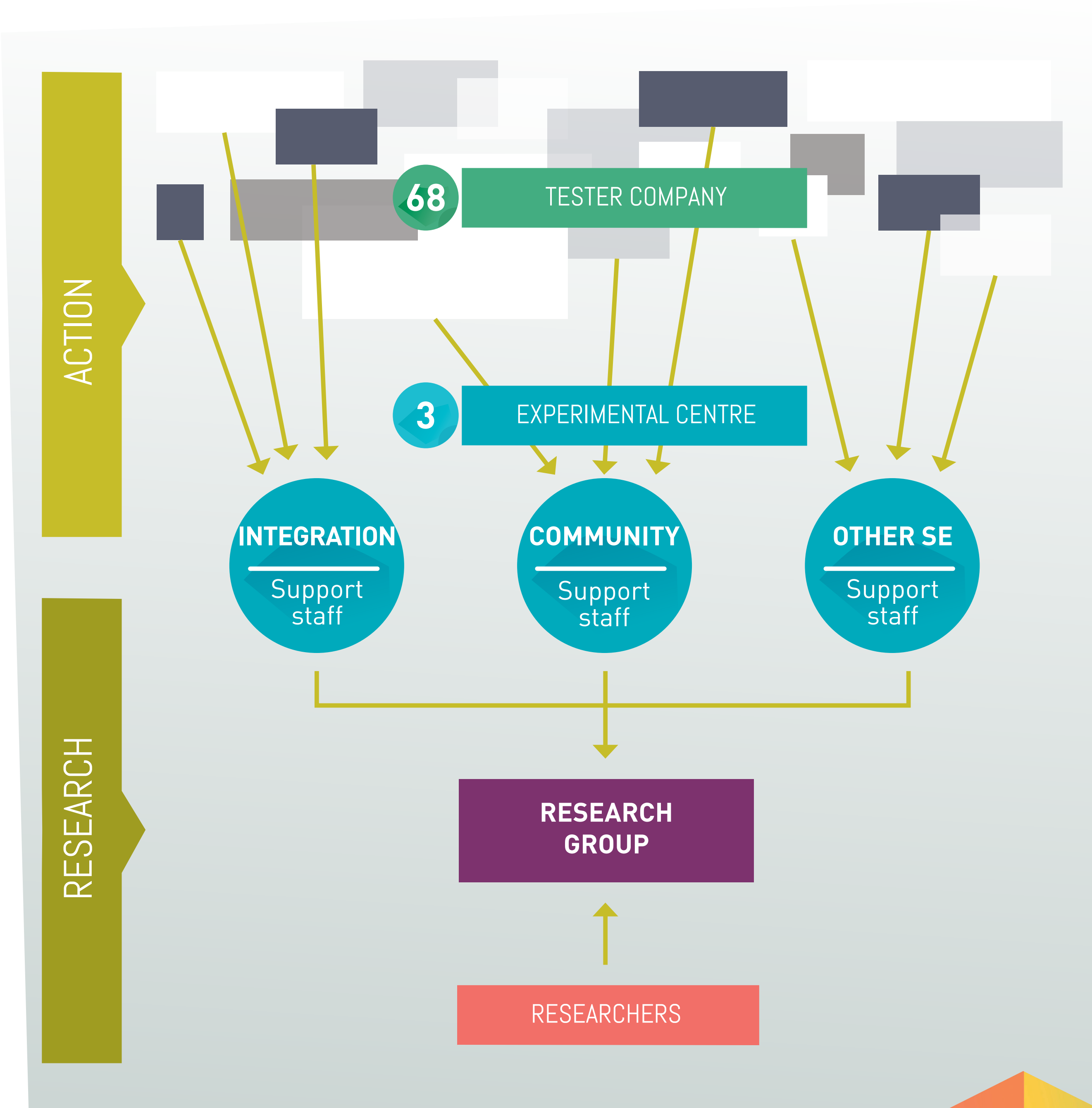
The action-research path was a conscious choice: the VISES project has, from the very beginning, required three factors which characterise all action-research programmes: a process based on action, a blurring of the boundaries between actors and researchers, and a cyclical process (Roy & Provost, 2013).

When we embed research into the action itself, we're acknowledging that change is needed while hoping that we'll improve our knowledge by doing so. The original aim of the VISES project was, among other things, to develop an evaluation method which (like other existing practices) could not be criticised by actors in the social economy for « *not coming from the people involved, being developed from the top down and being formed out of context* » (GR*). The VISES project team therefore considered that it was essential for companies and federations in the social economy to be directly involved in the process.
It was essential, allowing them to understand companies' needs and difficulties while highlighting the assets and specific qualities of the social economy. The project was therefore designed around a large-scale experiment, focusing on an evaluation process involving some seventy companies in the social economy. These companies were selected and grouped into three experimental centres: an « integration » centre, a « community » centre and an « other SE » centre. Each centre provided support to the companies and brought together the support staff provided by the federations (which act as support structures for their companies). At the centre of the process, we can identify two main types of participant: the tester companies and the support structures.

However, this work in the field was not limited to action itself. The project was not designed to be research « on the participants », but rather « with the participants ». This means that there was a deliberate effort to blur the boundaries and move away from what we think of as traditional research. From the very beginning, **VISES made it clear that the participants and researchers would be jointly involved in both research and action**.

The participants in the field (companies and support staff) were brought into the project to share their expertise. Essentially, the VISES project required the knowledge and experience of the participants in order to fuel the research side of the project. « *We need to capitalise on the participants' direct experience and help them put it into words* » (GR*). In order to bring them into the research process, the support staff were encouraged to work with researchers in the Research Group, and companies were invited to « company days ». Here, they took part in the action development process, and helped define the future actions needed.

The diagram below illustrates these interactions in the action-research centres.



Both the VISES project partners and the companies benefited from « *working closely with researchers to lend credibility to their process* » (GR*). They were aware that they would probably stray from the beaten path, so they needed support to ensure that their process was rigorous and therefore legitimate. As summarised by Roy and Prevost (2013), researchers must help the participants reduce their uncertainty to the point that they feel sufficiently comfortable to make enlightened decisions. However, the researcher must also *'be capable of demonstrating that the data collected are relevant, reliable and credible according to the criteria adopted by the scientific community, that the intervention takes any existing theoretical progress into consideration and that the lessons learned during the process could potentially be transferable to other comparable contexts'* (p.141).

Lastly, if the VISES project team felt the need, they could take the time to co-develop the process; this meant allowing for a cyclical process over the four years, with room for movement between observation, action and discussion. The approach is largely inductive: it starts with shared preoccupations and uses the expertise on hand to give a shared representation and develop a strategy through which a solution can emerge. This cycle is then be repeated until the partners consider the problem to have been sufficiently solved, and that all the possible lessons have been learned.

SECTION 2 : **Implementing the action-research process**

WHAT HAVE WE **LEARNED** ABOUT THE **ACTION-RESEARCH** PROCESS?

VISES was a four-year project, financed as part of the Interreg. programme. It brought together various different participant categories : federations or networks of companies in the social economy, research centres and/or teaching establishments, companies in the SE. The companies came on board voluntarily and received no monetary compensation for participating.
In addition to this « company » category, we can identify operative partners (organisations financed as part of the project) and associate partners (organisations not financed as part of the project).

In this second section, we shall focus on the lessons learned during the VISES project, in terms of the action-research process. These are structured around three themes: the identification of key roles, construction of the community and project phasing.

1 IDENTIFYING **KEY ROLES**

While action-research does blur the boundaries between the partner categories, certain roles must however be allocated. Sometimes, these roles can generate specific, real-world issues that must be addressed. We shall look at three different roles here: coordination, planning the methodological framework for the action-research and experimenting. [4]

a Coordination: more than just putting things together

From the very beginning, project coordination was handled by Concertes (BE) and CRESS Hauts de France (FR). ConcertES is the joint structure in Wallonia and Brussels which represents the organisations in the social economy and brings together 17 social economy federations. The CRESS (the Regional Chamber for the Social Economy) brings together the companies and networks in the SE and handles their promotion, development and representation across the Hauts de France. These two organisations had previously coordinated a joint cross-border research project[4].

This role is above all about getting things moving. Throughout the project, these two structures worked to:

1. CONCEIVE
2. PROVIDE AND ENSURE
3. MOVE FORWARD
4. RESOLVE
5. INTERACT

(1) conceive the project and encourage other organisations to become invested in it (as partners or associates),
(1) provide a constant reminder of the participants' shared objectives and ensure a framework for their interactions,
(1) ensure that the project moved forward, even though the process itself was cyclical (providing a reminder about the planned steps, deadlines and commitments),
(1) resolve a multitude of organisational problems which arose over the four-year project period (action coordination, financial problems, HR issues) and
(1) be the first line of contact for the various European bodies (COMAC).

It did not take long, however, for two additional requirements to be identified.
First, the complexity of the project (the high-priority theme, the large number of participants and action modules) raised the question of internal leadership. Certain debates needed to be held, tension between the organisations had to be resolved and strategic directions had to be taken which could not satisfy all of the participants. In addition to their full-time coordination role, leadership and arbitration were necessary too. As such, in an effort to maintain legitimacy and effectiveness, an expanded coordination body was instituted. The various heads of the modules and the experimental centres joined the coordination team.

Moreover, the political and institutional nature of the project made it essential that there was a choice validation and communication process outside of the « VISES consortium » - for the entire duration of the project. Ideally, in the spirit of participative democracy, the platform (which brought together all of the project partners) would assume this role. In reality, however, after several months a strategic committee was set up to handle the various strategic, political and institutional issues which arose, as quickly and effectively as possible. This committee brought together the same organisations (but not necessarily the same people from these organisations) as the expanded coordination body, but did not assume the same role. After further analysis, however, the coordination team decided that there should only be one body instead of two.

(4) The DESIR project (Inter-regional development of the social economy) was supported by the European Interreg IV programme. In particular, it allowed them to develop a cross-border observatory for the social economy.

To summarise, within this ambitious action-research project, the role of the coordination body eventually covered three key areas:

- Administration
- Operations
- Strategy

The administrative aspects were effectively placed under the responsibility of the project leader and their French counterpart, considered by Europe to be in charge of running the project in general. The operational aspects were first handled by the coordination body, but quickly fell under the responsibility of a much larger team with actual control over the operations, and for which each member benefited from working together to make their actions more effective. Lastly, the political and institutional aspects were initially handled by the coordination team but, over the course of the project, their management was entrusted to a larger group (the strategic group). This was considered legitimate and effective, while still ensuring official oversight of the platform.

b Methodological guidance: the difficult road to legitimacy

Responsibility for steering the action-research methodology should theoretically have fallen to researchers, who were tasked with steering the « Research Group ». Most of the federations were present in the Research Group too, alongside the researchers. This led to an issue of legitimacy and delegation of roles among the two types of participant (federations and researchers).

> FOR THE RESEARCH TEAM, PARTICIPATING IN THE VISES PROJECT WAS AN OPPORTUNITY TO ESCAPE THE CRITICISM THAT COULD OTHERWISE BE LEVELLED AT THEM.

Essentially, for more than a decade, CES researchers have worked to address the risks inherent to the various social impact evaluation methods. Thanks to their various interactions with the SE sector and their financial backers, they have an incentive to pull out all the stops and work with the participants involved to create a solution that can actually be implemented.

However, for a research team used to working « on the social economy », difficulties arose as soon as the project began. The researchers had problems getting ready and into position. After a superficial guidance period (January to April 2016), they were put under pressure by some of the partners, who voiced their fears: « *We don't know where we're going... We'll never get there... Who's managing this project? How can we convince companies to participate if we're not giving them more guidance?* » (GR* June 2016). This led them to opt for more tightly controlled guidance and a clearer, more pragmatic and consistent process inspired by existing tools, which they proposed to implement in each of the companies (June 2016). This however led to criticism from other researchers (the SE chair and the Godin Institute), who criticised their position, and from certain federations, who were worried that they would eliminate any effort towards co-development. This had a destabilising effect on the VISES project researchers, prompting them to become simple Research Group coordinators and adopt an « external » position. They worked on the theoretical summary, which was required as a pre-implementation assessment of the situation (end of year 1). In reality, the position taken by the researchers only became suitable for the action-research project once the experiments actually began (January 2017), and their expertise turned out to be useful - but not sufficient. The researchers proposed methodological tools (analysis framework, vocabulary, steps, log books) and systematically submitted them for discussion within the Research Group. Gradually, they were able to capitalise on their knowledge and offer their analyses to the Research Group. Lastly, upon the request of the various other project partners, they organised methodological training sessions and helped coordinate the experimental centres. The participants involved appreciated their position: « *We floundered a bit at the start. We thought that the research team would coordinate everything, but in the end it wasn't the case: all the participants were on the same level. Thanks to this, we managed to achieve effective co-development in the project.* » (GR *)

In hindsight, it seems that the researchers needed to be reassured during these interactions - they weren't used to them (their professionalism was never in doubt, their humility and openness was appreciated, and they were given room for error), and they needed to be provided with facts, data and discussion.

> THE PARTICIPANTS NEEDED TO REALISE JUST HOW FAR OUT OF THEIR COMFORT ZONE THESE RESEARCHERS WERE, IN TERMS OF THEIR USUAL RESEARCH METHODS.

They had abandoned their usual hypothetical-deductive approach, and their involvement in the action side of the project made it more difficult for them to publish in scientific journals - not least for lack of time.

In terms of their methodological guidance, the work conducted by the researchers was appreciated by the participants in two key ways. Firstly, they reiterated the fact that the researchers' presence made it easier to acknowledge the VISES process as a research project, one that met the standards of any other research project (rigour, transferability). Secondly, they considered that the researchers ensured that the project maintained its knowledge development objective. « *They are used to collecting data, processing it and providing an analysis that the project can then build upon* » (GR*).

For the participants too, the challenge was daunting. They were encouraged to become co-researchers and active participants in the knowledge development process, preparing the groundwork for future actions. They needed reassurance (that they can make methodological choices, that they're useful and relevant, that they're not wasting their time, that they're not being manipulated) and they also needed to be stimulated by the framework proposed by the researchers (which implies a shared knowledge base and the use of a common vocabulary, making it easier to contribute and appropriate ideas and concepts).

For the VISES project, there were two elements which made it easier for researchers and participants to work together. **Firstly**, when selecting the research team, three criteria were used: researchers must already have worked on social impact; they must be actively engaged with the social economy and have developed personal relationships of trust with some of the participants; and the researchers must be able to interact with the participants. Outside of the research centre, for example, there was a researcher in one of the support structures working on a thesis whose profile corresponded to the selection criteria. **Secondly**, the SE federations entrusted the VISES project to « officers » who were skilled at analysis, and involved in a daily basis with continued education, appeals and even studies within their own organisations. This second element suggests that the federations and networks in the social economy are the ideal organisations through which to implement action-research projects. Essentially, they attract and recruit people motivated by action and change, but also work to develop an overview of the sector and the knowledge they need to implement and legitimise their actions. By their very nature, they seem to have the ideal tools for this type of project.

This said, however, more time would have been needed to come to an agreement about the project's approach to co-development. Each party's vision of the project needed to be clarified, and there needed to be some validation that the consortium had indeed brought together the right people to conduct an action-research process that was universally considered relevant. This phase of mutual recognition and acceptance of the various complementary skills provided seems to be extremely important. For example, it would have made it easier to accept that there were gaps in the methodology at the beginning (among the federations), to integrate corrections within the group without any perception of denied legitimacy (among the researchers) and to reach a compromise on certain key questions much more quickly.

C Experimentation: two roles rolled into one

WHEN YOU TAKE PART IN AN ACTION-RESEARCH PROJECT, YOU OBVIOUSLY NEED TO THINK ABOUT BOTH ACTION AND RESEARCH.

As such, participating in action-research means conducting « *two distinct activities which obey a different logic (support for action versus thought on action)* » (Roy & Prevost, 2013, p. 136).

With the VISES project, it was important to fully understand the two levels involved in the action-research process. The ongoing experiences of the companies formed one level of discussion and action, providing lessons which could be learned. There was a second level too, though, in which the various evaluation processes implemented within the companies could be discussed collectively.

So for both of these levels, within the companies and during the cross-party discussions, it was up to the support personnel sent to the companies to act as both researchers and actors (participants). Essentially, university researchers have no experience in the direct implementation of a social impact evaluation, and the tester companies were relatively isolated from the cross-party research process. They were however ready to get involved and develop a process at their end, as part of a wider experimentation and co-development framework implemented across the social economy sector.

In this way, the action-research dynamic was facilitated by the work of the support staff. They acted as « intermediary » participants, sometimes playing the role of a researcher in the company (for example, reminding the workers of the need for rigour, ensuring that the choices made by the company are fully justified) and as actors within the research group (for example, alerting them to the complexity of their language or about the time constraints, describing the real-world obstacles encountered by the companies).

This dual role certainly generated a great deal of tension for the people concerned.

Three techniques were used within the VISES project to reduce the tensions generated by the process.

Firstly, two specific co-development spaces were provided for each project-related issue. In this way, the experimental centres were primarily used as a platform to discuss the support practices and the implementation of the processes within the companies, while the Research Group, which often brought together the same people, was explicitly concerned with the general assessment, with setting milestones for the in-company processes, with collecting the data from these processes and with organising the group discussions about the lessons learned. Undoubtedly, the experimental centres acted as a sort of « valve », releasing the pressure generated by the actions implemented in the companies. They also used the proposals from the research group to guide their actions within the companies. Please note (and we will look at this further) that the experimental centres were the basis for much thought and discussion about the « role of the support staff ».

Secondly, several organisations sent pairs of representatives to the project, allowing their project representatives to maintain either an « actor » role or take on a « researcher » role. These pairs facilitated the discussions within the participating organisations, allowed for real involvement in the action and provided the perspective necessary to further our knowledge.

Thirdly, to help the participants think « about their action », a « log book » tool was proposed. This allowed them to note any observations about the process, while continuing to implement it. Please note that the participants generally found completing their log books to be very tedious. However, their entries were used by the researchers to provoke useful discussions within the research group. After this, the participants appreciated the fact that their observations were properly discussed and taken into consideration.

2 BUILDING A COLLECTIVE

THE LESSONS LEARNED FROM THE VISES PROJECT HAVE LED US TO MAKE SEVERAL **OBSERVATIONS.**

Action-research brings a variety of different partners together around a common objective: it's about taking action to resolve a shared problem and generating new knowledge along the way. It requires the creation of a working collective which reflects the variety of different positions and perspectives: not everybody has the same issues, the same skills or the same resources. Is it a natural reflex to form a collective? Must this collective exist before the project begins? If not, how can you progressively build a team and overcome differences which can cause tension, disengagement and ineffectiveness?

The lessons learned from the VISES project have led us to make several observations.

a The engagement curve

First, over the length of the project's life span, we observed what we call the « engagement curve », characterised by a series of four phases.

PHASE « WAIT AND SEE »

In the first phase, before being financed by the Interreg programme, the project was supported by the CRESS and ConcertEs. These two umbrella organisations brought in a wide panel of other organisations into a 3-part meta-project (impact - social innovation - local community). What would later become the VISES project was only the first part of this. Two group meetings were held, focusing on the impact part (and a larger discussion day was organised in Lille covering all three aspects, on the 09 July 2015). There were a large number of participants, who were mostly open-minded about the venture; there were however four limiting factors restricting their involvement in a collective action-research process.

Firstly, aside from the CRESS and ConcertEs, most of the participants were unused to working together (different geographic areas, goals and skills). Secondly, they were in competition with each other or « *just didn't get on* » (GR*).

Secondly, while most of them were interested in the themes discussed (and, let's not forget, the financing possibilities for their organisations via the Interreg programme), many didn't feel there was any « need to act » on these issues. Unfortunately, the need to act is generally the driving force behind any action-research process.

Thirdly, the scale of the meta-project made most of the participants dubious about the chances of it being supported by Regional Authorities and financed by the Interreg programme. Each party saw the others as a possible source of failure in this joint financing venture.

Lastly, as long as there was no funding, it was particularly difficult to get each party to work on the project. It was fairly logical that (as acting for and defending the social economy were part of their core priorities) that the CRESS and ConcertEs would seed the project, develop its framework and secure financing for it.

PHASE « SOFT FOCUS »

Once the four-year impact initiative (christened the VISES project) had secured financing, the participants got together to get the ball rolling (January 2016). This marked the start of an awkward phase, which would end up lasting almost a year. Despite a fairly precise description and demarcation of the project, the participants had difficulty finding their way and getting started. We've already discussed the difficulties encountered by the research centre to set a methodological framework for the project. However, the difficulties went further than that. We needed to build everything from scratch. What was the objective of the project? How could each participant appropriate it and participate fully? What was the project mechanism? How should the various groups work? What would each of the groups do? There was certainly enough work to be done, but the participants lacked direction and used this as an excuse not to get involved. A series of meetings were convened. The relevant people were there, but the project struggled to get off the ground. With the exception of the coordination team, everyone held back and seemed content to wait and be told what to do.

PHASE « SAME BOAT »

There were, however, three distinct factors that finally got the ball rolling.
Firstly, the research group had to summarise the research that already existed on the subject (practical and theoretical). Everybody considered the production of this information to be a key step, giving them their first real opportunity to work together. From here, they could begin to discuss the actions they'd be experimenting on in the VISES project. Not everybody had the same vision of what needed to be tested, but everyone was involved in the discussion and shared their opinion.

Secondly, the support organisations had to recruit tester companies. As a result, the recruitment process had to be collectively validated (choosing the companies according to a selection matrix, establishing a contractual basis for the support relationship).

Thirdly, the VISES project had to be presented during a round table with the project's financial backers (Lille, 11 October 2016) and during the first social impact meetings (RIS, Bois-du-Cazier, 23 November 2016). The various partners also participated in the impact events (the « Measuring Social Performance » symposium - Les Petits Riens Chair - Louvain-la-Neuve on the 09 November 2016; the Sociale Innovatie Fabriek Workshop on the 29 November 2016; the international (Social) Impact Measurement and Measurement Impact Workshop - ESS Chair - Lille on the 06 and 07 December 2016). Here, the project participants finally realised the extent to which they had embarked on a shared adventure - the results were now being expected, and the premises had already garnered interest.

For almost two years (2017 and 2018), the VISES consortium was cruising. The various project partners had made the project a high enough priority, and each party's roles seemed clearly defined. They expressed their satisfaction at being part of this joint project, and the meetings were held in a constructive and relaxed atmosphere.

PHASE « WHAT NEXT? »

However, a gradual change came over the project. VISES was not the only project that the partners were involved in, and one of them had developed other social impact evaluation activities at the same time. This non-VISES experience undoubtedly enriched the collective process, but at the same time led to the different parties working at different speeds. While some of the partners were still heading up support processes within their companies and the research centre was working to capitalise on the lessons learned, one partner was ready to begin providing social impact evaluation training and offer support to companies outside the scope of the VISES project. Now, we're not stigmatising any legitimate and effective behaviour. However, we do need to discuss the impossibility of keeping everybody at the same rhythm over a long period of time. This could be a source of frustration, leading some partners to disengage from the common objective once they had taken enough out of the project for themselves. The final year of the VISES project saw each partner's own issues and priorities float back to the surface.

There was however a coordination initiative in place, which helped reduce this movement towards disengagement. The VISES project shone a light on a number of other common problems affecting the social economy. The coordination team used a new appeal to the Interreg project as a way of encouraging the partners to help develop a new project. Two meetings were held to discuss this. While they did manage to help the collective dynamic regain some momentum, it also unearthed the old questions of power which come with the discussion of money and partners. Some of the partners regressed into the initial « wait and see » attitude, while others were more forward in their desire to take control of the leadership.

b The positive factors

An action-research project is not all plain sailing

> WE HAVE DISCUSSED A NUMBER OF ELEMENTS WHICH HELPED BRING THE COLLECTIVE TOGETHER: FLUID AND EFFECTIVE COORDINATION, RELATIONSHIPS OF TRUST, A SHARED CULTURAL BASELINE, EXTERNAL EXPOSURE TO THE PROJECT, A DIVERSITY OF CO-DEVELOPMENT SPACES AND COLLECTIVE AGREEMENTS.

Firstly, the project benefited from fluid and effective coordination. The leader of the project and his French counterpart agreed to share leadership with other participants, but consistently worked to manage and coordinate meetings in such a way that they remained participative and forward-thinking. They worked to increase the project's room for manoeuvre by adapting the initial schedule while acceding to the requirements of the various backers. They also ensured there were plenty of meetings (and even bilateral talks) to ensure that the choices made had indeed been validated by the collective. Lastly, they took care to keep things as informal as possible in an effort to strengthen the partnership.

Secondly, the project was built on relationships of trust between people and between organisations. Some of these relationships pre-dated the project, and certainly made the launch phase easier. They also turned out to be a good way of managing tension and reducing misunderstandings. It went the other way too: the project was a vector through which trust could be built. The partners considered that, through their experiments within the companies, they were confronted with the same difficulties, asked themselves the same issues and answered them together. Through this shared set of circumstances, the other support staff came to be seen as genuine partners.

Thirdly, the various partners were able to start from a shared social baseline. Most of them spoke the same language (French). The Dutch-speaking partners had the great courtesy of speaking in French during the discussions, which certainly made the collective process easier. Despite the fact that the project crossed the border, the partners saw that the same issues were facing the social economy in both countries. Gradually, by using a reference framework which had been co-developed and appropriated by each partner to discuss the issue of social impact evaluations (plan, vocabulary, support steps), they were able to reinforce this shared foundation. Indeed, a number of structural elements reinforced the impression that they were part of a single community (meeting frequency, shared layout for supports and deliverables, the shared use of Google Drive, regular reports, the use of the same spaces, shared train journeys, etc.). This seems to confirm one of the observations made in the action-research literature, which say that a shared culture is « *a variable which paves the way for a real, beneficial partnership, and which also helps ensure comprehension between very different participants* » (Narcy, 1998, p.4).

Fourthly, the partners were invited to represent the VISES project outside of the consortium, in their contact with the testing companies, with financial backers, with the press and with other researchers. As a general rule, we saw that minor internal disagreements tended to disappear as soon as the partners were jointly exposed to an uncontrolled and potentially « hostile » environment. It appears that their exposure to other points of view, their combined work to make a case for the project, « *their identification of the weaknesses in the VISES project* » (GR*) and their public support for each other in the face of adversity provided the glue that held them together. Some of the partners had the opportunity to jointly participate in international events (Bilbao in October 2018, Montreal in April 2019). This was clearly an excellent team-building exercise, while also helping the group forge a VISES identity that they could all share. This exposure to elements outside the consortium was also considered a way to « *reinforce the project's political appeal » (GR*) or « further their shared knowledge - through exposure to other points of view and other realities, we can expand what is possible* » (GR*). This being said, exposure during the start-up period focused unnecessary pressure on the results and placed the « ambassadors » in uncomfortable positions. « *You need to have concrete results and something to say first* » (GR*).

Fifthly, the formation of a collective ethos undoubtedly required a wide range of spaces and times at which the parties could co-create. These various events were a way of « *acknowledging each party's intellectual contribution and allowing them to each be a part of the process* » (GR*). While it's true that the action-research project was initially designed through a coordinated process (using a dialogue with certain partners), its real-world implementation required a number of adjustments and a good dose of creativity. The coordination team allowed a certain amount of wiggle room, but still ensured that the project had all the resources it needed to pursue its objectives. By allowing for discussion about the project plan or speaking about the project in various different spaces, the coordination team reduced the risk that any tools or deliverables which hadn't been approved by the partners would be produced. Moreover, the various organisations seemed remarkably well-suited to taking on different roles. Sometimes, the same people were required to take on very different roles, but each one was quick to identify the different roles assumed by the different project groups. Additionally, participation by the same people and/or organisations in different debates and different arenas probably helped thing move smoothly forward too. On the other hand, it was not all positive: « *it reduced the diversity of the points of view put forward, and tended to paralyse the process* » (GR*).

By observing the manner in which the VISES project was structured, we cannot ignore the similarities with a holacracy, a system in which the structure consists of independent circles which assume their roles and are accountable to the whole - in line with the purpose of the organisation (or project). In a holacratic system, it is not rare to see the same people involved in several different circles. In this way, the project could take on an agile structure with very little internal hierarchy. The number of different groups was occasionally seen as a waste of time, but it did allow for a tight focus within meeting and the guarantee that other subjects would be handled in other spaces.

It looks like a collective is indeed built by overcoming difficulties together. While the action-research process was punctuated by a number of debates, it was nevertheless not always possible to get everybody to agree on everything. Indeed, at some points, the participants may have believed that no progress was being made at all. The meetings were designed to clarify certain options, define certain issues or make collective choices. Often, this process allowed for minimal yet incontrovertible agreements (for example, the agreements reached on the conceptual framework, the definition of practices, the shared ethos of the companies in the social economy, the role of the support personnel). The project only becomes truly collective once it has a basis on collective agreements which remain settled and undisputed. Of course, this means that the decision-making process takes time, but the decisions made are more robust and the promises made have greater value.

3 A FLEXIBLE APPROACH TO THE FOUR PHASES

OBSERVATIONS WHICH ENHANCE THE UNDERSTANDING OF THE PHASES AND THEIR SEQUENCING

There are four general phases in any given action-research project: orientation, development, experimentation and capitalisation (Christen-Gueisaz et al. 2006). Our experience from the VISES project allows us to make a number of observations which can improve our understanding of the phases and how they are sequenced.

a First, defining the problem at hand

In theory, the first phase (orientation) sees the actors and researchers sharing their concerns about the situation they have been brought in to work on. They proceed to analyse the context, identify the various points of view present and produce a shared definition of the problem (Christen-Gueissaz et al. 2006). In reality however, when the action-research project falls under a programme financed by public institutions and is not specifically oriented towards co-development, these backers generally require a fairly precise description of the problem, and the research project or action programme intended to resolve it. With the VISES project, a number of methodological choices had already been made before the project had officially begun. This means that the direction was initially defined by the parties most directly involved in the pre-project stage: the coordination team, in dialogue with the researchers.

Here, the preliminary work did not save any time - during the following phases, the various basic questions were repeatedly taken to all of the participants for discussion: what are we trying to do? What are our objectives? Which observations are they based on? Why should we be acting at all? This highlighted the importance of getting as many people on board as possible at the very beginning. It also showed that the orientation phase is much fasted when the partners around the table know each other, are used to sharing their points of view and frequently discuss their respective issues. When putting together a consortium for an action-research project, it wasn't long before we saw the benefits of using a pre-formed network of actors (at least one in which the core is already formed), connected to the world of research. This means that, within this core, there is already a channel for dialogue and the capacity for them to be quickly alerted and mobilised to tackle shared issues.

b Development based on compromise

Next, in the second action-research phase (development), the partners in the project « *use their expertise, their experience and their reference frameworks to construct a sufficiently wide representation of the situation to then take action* » (Roy & Prevost, 2013, p.134). They discuss various strategies and draw inspiration from scientific research and/or real-world experiments and experience. In general, the researchers provide methodological assistance by turning the discussions into a series of choices that could then be chosen. Together, the partners then explore and debate the various possible scenarios, their benefits and their risks. Thanks to this perspective development exercise, they are able to construct a process.

In terms of the VISES project, this second phase consisted primarily of producing two summaries (a theoretical summary of the literature and an empirical summary of the various social impact evaluation processes) and allowed all of the partners to reach the same level of understanding by discussing these summaries and meeting other researchers who had worked on this theme

(Florence Jany Cattrice Chaire ESS, Nicolas Chochoy Institut Godin, Anais Perilleux Chaire Les Petits Riens, Tomas De Groote Sociale Innovatie Fabriek, Adrien Baudet KPMG and ESCP Europe). In this phase, the project moved away from the project planning sheet developed to secure Interreg financing, as the consortium had given up on developing a shared social impact evaluation tool. We preferred to consciously risk giving the tester companies the opportunity to independently create their own social impact evaluation process based on a minimal social base (conceptual framework, key steps in the process). This was the project's compromise, a third way between a standardising pragmatism (let's decide upon a shared tool and build shared indicators) and a policy of resistance (let's take into account the complexity, respect the diverse nature of the situations and the priorities set by the companies).

c Support, playing a crucial role in the experimental phase

Next, in the third phase of the experiment, the actors and researchers work together to implement the actions identified in the previous step as potential real-world solutions to the initial problem (Christen-Gueissaz *et al.* 2006). This third phase saw the launch of the experiments themselves within the tester companies and alongside the support personnel. For the VISES project, there are two observations we should mention.

Firstly,it quickly became clear that the experiment was actually a two-level phenomenon:
(1) the « tester » companies were trialling an SE process and (2) the support structures (federations or networks of social companies) were trialling a process to support the SE process itself. At the outset, the VISES project was not intended to study the support process, but the actors wanted to address this issue. To avoid confusion, the decision was proposed by the Research Group to spend a limited time working on the support process. By acknowledging and addressing this adjacent issue, we were able to get a clearer vision of several elements within the SE processes implemented by the companies.

Secondly (and this was discussed earlier), the support personnel played a hugely beneficial role in the experiment.

> THEY PLAYED THE ROLES OF BOTH ACTORS AND RESEARCHERS, REDUCING THE NEED FOR COMPANIES TO BE INVOLVED IN THE RESEARCH AND RESEARCHERS IN THE ACTION.

Indeed, it's thanks to these intermediary staff that the experiment could be expanded so far (68 companies over a three-year period). They also facilitated the collection and treatment of the experimental data - with the help of the researchers, it was the support staff who designed the analysis framework so the companies did not have to spend time on it. Of course, one could say that their presence constituted a filter and possible source of bias between the experience of the companies and the analysis of this experience within the Research Group. Additionally, the companies mostly experienced the project during the experimental phase only, and did not reap all the benefits of a full action-research process.

d Further capitalisation and a spin-off phase

Finally, the capitalisation phase consists of analysing and reporting on the results of the experiment and publishing them - primarily through the creation of scientific articles and reports. The focus here is the distribution of new knowledge from which others can benefit (Christen-Gueissaz *et al.* 2006). In the VISES project, the capitalisation phase started strongly. As they were unable to predict the probable nature of the results, the researchers preferred to organise the research group meetings as opportunities for joint analysis of the observations, and a way to identify the research questions raised by these analyses. As such, the capitalisation phase became an iterative process: the researchers proposed an analysis framework, the research group refined and approved it, the support personnel helped lead the process within the companies and collected the data which they submitted to the research group, the researchers analysed the data and proposed an initial analysis within the research group, who then completed and approved the analysis.

The capitalisation process was spearheaded by the research team, but the process was significantly aided and driven forward by the actors. Throughout the entire project, the actors showed great collective reflexivity. By this, we mean the capacity to find a way between involvement in the action and analysis in perspective. We did however need to find a way to spark and channel this reflexivity. At the beginning of the project, the systematic use of written material (reading over the documents submitted by the researchers) did not make co-development any easier. The widely used research technique of co-writing articles was ineffective under these circumstances: it took too long to respond, dialogue did not flow naturally, the participants felt trapped or powerless, the researchers felt misunderstood and that they were wasting their time. Most of the participants, actually acquired their reflexivity by speaking out during research group meetings. This did however require the analysis proposals to be formalised (oral presentation with PPT support) and the debates needed to be coordinated by the researchers. As a result, the research group meetings became a time to capitalise on the data. At the end of any important discussions, the research team would propose an immediate summary of the lessons learned. Then, at the end of the project, it was easy to capitalise on the experience by using the Research Group meeting reports and the intermediary deliverables.

BEYOND THE CAPITALISATION PHASE (WHAT HAVE WE LEARNED?), THE VISES PROJECT PLAN ALSO INCLUDED A SPIN-OFF PHASE.

This implies the production of fully presented, actionable results: training programmes, awareness, handbooks for use in companies, company capsules and films. This additional phase seems relevant for three reasons.

Firstly, please bear in mind that the participants in the VISES project initially voiced their frustration that they could not easily assimilate the existing tools available if they wanted to implement a social impact evaluation. There was therefore a clear desire that we produce actionable results. This has been reflected primarily in the production of a brochure for companies, a summary document for support personnel and awareness and training modules. « *The spin-off phase takes the capitalisation process a step further, bringing it into contact with other companies and other parties* » (GR*). For certain support staff, « *the spin-off phase was another opportunity to implement the action-research process - but faster, with more knowledge thanks to the VISES project* » (GR*). With the VISES results in mind, certain partners saw the spin-off phase as « *an opportunity to promote a shared culture and spread a new paradigm in the field of social impact evaluation* » (GR*). Some even hinted that an action-research project is never really finished, and that the spin-off allows us not to finish too quickly and to avoid frustration.

Secondly, as we have already discussed, the support personnel were the actors most directly involved in this action-research project. However, the action was conducted within the companies, so the results of the project had to be put into a form most easily assimilated by the companies themselves. For certain federations, « *the spin-off is capital, as it meets the needs of their members* » (GR*). The Interreg programme also requires the volume results of the companies affected by the project.

Lastly, and this is connected to the previous points, the support structures working with the VISES project are primarily organisations which develop training programmes and provide advice and consulting services. The VISES project results would feed naturally into these activities, so a spin-off would therefore be a strategic advantage for them, and allow them to plan further forward. However, the partners did acknowledge that this spin-off phase is not, operationally speaking, entirely collective (« *everyone spins off for themselves* ») - but at least it is discussed within the consortium, « *which helps maintain a collective dynamic* » (GR*).

SECTION 3 : **The effects of the action-research process**

WHAT HAVE BEEN THE PRIMARY **EFFECTS** ON THE PARTNERS?

The first section of this document detailed the purpose of this action-research project. Now the project is complete, it is a good time to describe the main effects perceived by the participants.

One of the initial objectives of the VISES project was to build a shared social impact evaluation and promotion tool. Over time, the objective became « *for the SE to be evaluated and valued for its actual and useful performance (including for itself)* » (Platform Meeting on the 23 October 2017).

As with all action-research projects, the VISES project aimed to instigate change on three levels (Gonzalez-Laporte 2014). **Firstly**, it needed to provide solutions to problems encountered directly by each type of project participant. We therefore needed to check whether the partners (and the companies) had found any concrete answers. **Secondly**, this project aimed to bolster the skills of both the partners and the companies. We therefore needed to evaluate to what extent this action-research process empowered them. **Thirdly**, given the external context and the increasing importance of the social impact evaluation, it would be useful to see whether the VISES project made the environment more endurable for companies in the social economy.

These three effects are specific to action-research projects and have been widely documented in the literature, sometimes under other names (Gonzalez-Laporte, 2014). The difference between projects is the priority they put on certain effects. As such, using an Anglo-Saxon conceptual framework, action-research projects would be highly pragmatic and would primarily seek the efficient resolution and management of shared problems, while from a more southern European perspective, action-research would be a more critical process, aiming to produce knowledge differently and keeping the participants in the centre of any change process. Here, empowerment is considered an important factor. The third effect, the capacity to transform the environment, is discussed to a lesser extent in the action-research literature. It refers somewhat to the theory of institutional entrepreneurship, and would be worth dwelling on (Battilana *et al.* 2009)

1 OBJECTIVE 1 : FINDING REAL-WORLD SOLUTIONS

Participating in an action-research project about the evaluation of one's social impact implies (for participants) the co-identification of a common problem. This does not mean, however, that the real-world answers provided by the project will necessarily be similar for each type of participant.

a Companies

Among companies in the social economy, there were three main problems concerning the evaluation of their social impact. **Firstly**, some of them felt they lacked the information, tools or skills to embark on this type of process, and to make an informed choice about which method to adopt. **Secondly**, they wanted both to embark on a process which was adapted to their unique circumstances while still recognised by their peers and the organisations and people they are involved with. Thirdly, they were aware of the cost of this type of process and wanted to ensure that evaluating their social impact would be useful - in terms of the promotion (external perspective) and/or improvement (internal perspective) of their activities.

Following this process, the support personnel considered that the tester companies were now familiar with the social impact evaluation vocabulary, and were better able to assess the issues at stake. They had made progress in terms of their evaluation practices, and the majority had seen it as an opportunity to strengthen their channels of communication with the people involved with their organisations. In particular, they were better able to understand themselves. They were able to demystify how social impact evaluations are done, and most of the tester companies wanted to redo this kind of test in the future - either using the same variables or from a different angle (another department, other effects, other beneficiaries, another type of data). Support from structures in the social economy helped reduce tensions, and companies felt that they were being listened to and respected. They wanted to go further than producing a few performance indicators, sometimes broaching more complex questions such as how to boost their local areas or enhance the well-being of the people involved with their organisations.

WHILE VISES DID HELP REASSURE THE TESTER COMPANIES ABOUT SOCIAL IMPACT EVALUATIONS IN GENERAL, THEY STILL WANT MORE INTER-ORGANISATIONAL DIALOGUE TO HELP THEM CO-IDENTIFY RELEVANT INDICATORS AND USE THEM TO IMPROVE THEIR PRACTICES.

After the VISES project's spin-off phase, it would be interesting to see the effects of the project on companies who were not directly involved in it, but who benefited later from its results via real-world actions inspired by it.

b SE federations/networks

For the support structures in particular, and the partner SE federations and company networks in general, there were three major difficulties when evaluating social impact. **Firstly**, like companies, they were aware of the growing importance of the issue but considered that they neither had the relevant knowledge, nor even grasped the issues at stake. **Secondly**, they felt that they lacked the tools and skills to train or advise their member companies in the evaluation process. **Thirdly**, in a field dominated by finance and consultants, some of them felt that the voice of the social economy was being drowned out - even though it was in the frontline.

Following the project, the partners (the companies) said that they were now more conversant in the language of social impact evaluation and were now better able to grasp the issues at stake. Even though some of them had positioned themselves as a counterbalance or considered themselves proactive on the subject before joining VISES, they were able to talk about it together, examine other perspectives (backers, consultants, researchers) and gradually come to understand the concept as a collective unit. Participating in the research group gave them access to a more global and analytical source of knowledge (both theoretical and practical), and they became de facto researchers in the field of social impact evaluation. Moreover, experimenting with SIE processes as support staff allowed most of them to gain practical knowledge, which had until then been the preserve of consultants.

The role of support assistant and the perspective provided by the analytical teams (centre meetings, inter-vision, research group) gradually provided each of the support structures with the tools they needed to train and advise.

SINCE THE PROJECT, SOME OF THE SUPPORT STRUCTURES HAVE SIGNIFICANTLY ENHANCED THEIR SOCIAL IMPACT EVALUATION SERVICE OFFER.

Lastly, the VISES project was an opportunity for the participants to work together and form a coherent position about social impact evaluation. They were able to fine-tune this throughout the action-research process and seize the chance to promote it. As such, the communications activities spear-headed by the VISES project have shone a spotlight on the answers found by SE federations and networks about the issue of positioning: issue reports, appeals, video capsules and more.

Overall, in terms of the social impact evaluation landscape, we can see that VISES has confirmed how important it is to respect the diversity of the companies involved. It has revealed the potential of an IES programme when it is conducted independently by the companies themselves, and when it makes sense for them. « *In VISES, we don't evaluate everything - we might not go as far as assessing the net impact of a company, but it's still highly beneficial (...) We are free to evaluate what matters to us. We don't feel like we're forced to focus on results, but rather look for a sensible way to evaluate and value the work we do, or evaluate how relevant our work is in relation to our stated objectives (and could even lead us to change our objectives...)* »(GR*).

VISES also draws attention to the importance of giving a company the opportunity to look at the whole story - taking the time to see the logic of their actions rather than forcing them to look at the results of their actions (which can never be perfectly understood anyway). This makes it much easier for companies to understand what they do better, and to highlight their practices (which are often what set them apart).

C Researchers

Evaluating social impact was problematic for researchers too. As we mentioned earlier, participating in the VISES project meant abandoning the relative safety of objective criticism and attempting to use their scientific knowledge to help companies in the social economy gain recognition while maintaining a dialogue between these companies and their environment. The researchers lacked the practical social impact evaluation experience to do this, and in particular to establish a link between the specific characteristics of companies in the social economy and how social impact evaluations are experienced. Fundamentally, they saw that their research up to this point had failed to deliver any actionable results to the companies in the social economy, and had failed to construct a shared, alternative position from which they could act and build.

Following the VISES project, the researchers were better able to defend their theoretical positions. Using real-world experiments and collective validation, they feel they have the tools they need to shed light on the issues and an attitude which transcends the two obstacles generally found in the path of social impact evaluation experts: the paralysing critical attitude of researchers, and a reductionist (and even imperialist) attitude of consultants.

2

OBJECTIVE 2 : DEVELOPING THE SKILLS NEEDED TO ACT

ACTION-RESEARCH IS DESIGNED TO INCREASE THE CAPACITY OF THE PARTICIPANTS INVOLVED TO ACT

Action-research is, generally, a process designed to induce empowerment. It is designed to increase the capacity of the actors to act. Of course, point one already lists the main lessons learned by the protagonists about the issue of social impact evaluation. However, they also learn and/or reinforce other skills to help them act.

a Companies

Through their participation in the VISES project, companies were able to develop a culture of evaluation. As the process proposed to them was left open, it goes much further than just submitting a report - companies were driven to foster an internal understanding of the actions they took (vision/objective/practices and activities/effects). This desire to « understand themselves » also promoted the evaluation as an ongoing process, rather than a one-off inspection. An improved collective understanding of the company's ethos and activities can lead to a positive impact on the corporate culture, both internal (working in the same direction, better dialogue) and external (more clarity in their communication).

In most cases, the support provided by the actor-researchers led companies to develop data collection and treatment techniques which were adapted and relevant to their activities. For some of them, these new technical skills led to better dialogue with their financial backers, allowing them to pursue their own evaluation strategies independently.

Lastly, thinking about their activities and learning to document them promotes the development of a **strategic vision** within the company. By participating in this project, tester companies could take a step back and think about how relevant their objectives and activities were, and how effective their processes were.

b SE federations/networks

We have already discussed to what extent the federations/networks in the social economy which participated in the VISES project consider their SIE skills to have improved. However, this improvement goes further than just the individual members of staff delegated by these organisations. They have since organised internal training programmes, and some have even become the point of reference for social impact evaluation within their ecosystem (e.g. At Uniopss, various regional mission officers have been trained in VISES methodology, and their Hauts-de-France branch is considered the reference for the national network).

For these partners, the VISES project was an excellent opportunity to cement their position as a learning organisation. This internal dynamic was particularly pronounced when several people from the same organisation were involved: « *Involving more people will give the project a better reach* » (GR*). The reach would even extend to the members of these networks: « *We organised our AG around the theme of social impact evaluation. Since then, our members regularly ask us for updates about the VISES project* » (GR*).

These organisations also saw an impact on their support skills. They even wanted to formalise the description of what they consider a new profession: the social impact evaluation support assistant. They went on to develop a standard reference for this profession.

The partners also said that their abilities to build and defend a political appeal had improved too: « *The impact has not just been technical. Once you understand the technique, you have a legitimate platform from which you can explain the political issues. If not, you're just not credible* » (GR*).

THE PROJECT PARTNERS BELIEVE THAT THE METICULOUS ACQUISITION OF KNOWLEDGE THROUGH ACTION BOOSTS THEIR POSITION AND MAKES THEIR ARGUMENT BOTH MORE LEGITIMATE AND MORE TENABLE.

Additionally, the partners consider that they have learned how to conduct action-research now, and think that this will be useful in future projects. « *This action-research experience has made us think differently about what comes next* » (GR*). It strengthened their capacity for abstract thought (their ability to generalise, take a step back, adopt a critical viewpoint, construct a scientifically reasoned position). They discovered or improved their knowledge and expertise in terms of research methodology (questionnaire development, interview guides, sampling strategy, bias recognition, focus group coordination, etc.).

Finally, they highlighted just how much the project put them into contact with the diverse range of people and organisations in their own sector. They became more aware of the diverse nature of their respective situations (between the experimental centres, and within them too) and, at the same time, they (re-) discovered the unique features they shared (even across the border), which they wanted to highlight and promote with the development of the RACINES portal[5].

C Researchers

The researchers managed to change their approach to both their research and their work in the field. They were put right into the heart of the action-research process, and this forced them to act differently and change their position. They had to deal with a variety of different roles with the same people, assuming the roles of expert, coordinator, catalyser and translator. Each role required different skills, knowledge and expertise, which are not easy to combine in a single person. This led us to make two observations.

Firstly, with this project, the researchers were forced to become more humble (« *they need to accept that they don't know, and that this is precisely the reason that we're going to research together* » GR*), and this helped them grow in self-confidence (« *now we've lived through the chaotic start to the VISES project and saw it through, we can live through anything* » GR*).

Secondly, the researchers were generally used to working in isolation. The VISES project was an excellent opportunity for them to work as a team, find a symbiosis between the researchers and begin to build a working method that the research centre could mobilise in the future.

Additionally, in their approach to the real-world situations, the VISES project helped the researchers better identify what they could bring to the table - and what should be left to the participants. For « locked in » researchers, it's not always easy to see what should be done. Their privileged position as observers and their scientific legitimacy can often be a temptation to try and take over the process. The participants said they appreciated how much the researchers were, in the end, « *just partners, the same as the rest of us. They*

(5) The Racines portal is a digital platform which documents the link between the companies in the social economy and their local areas. It also helps companies promote and distribute some of the results of their own social impact evaluations. www.projetvisesproject.eu

weren't above or below us, and it can't have been easy » (GR*). Some of the deliverables in the VISES project were established without any major input from the researchers: key issue sheets, appeals, film script and capsules and others. The researchers just read over them or watched them and made comments, just like the other partners.

3 OBJECTIVE 3 : TRANSFORMING THE ENVIRONMENT

CHANGING THE **CONTEXT** TO ALLEVIATE PRESSURE AND CREATE A BETTER ENVIRONMENT FOR THE COMPANIES IN THE SOCIAL ECONOMY.

One of the key objectives for an action-research project can also be to gradually try and use the legitimacy of the process to create a more positive environment for them. The institutional entrepreneurship theory says that, when faced with the pressure exerted on them, companies can gradually work to change the institutional context, reducing this pressure and creating an environment better suited to their way of doing thing (Battilana *et al.* 2009, Oliver 1991).

We can look at VISES as an institutional entrepreneurship project and see to what extent the participants in the project adopted this kind of strategy - and identify what kind of effects it can have.
In real terms, institutional entrepreneurs generally rely on two types of activity in order to implement institutional change in their favour: they develop a vision and mobilise allies, and motivate them to accomplish and support their vision. (Battilana *et al* 2009).

To develop a vision within the VISES project, the participants first drew on scientific articles for arguments, delaying the need to make a firm choice about their social impact evaluation. They then experimented in order to develop a process which was adapted to the actual context: the companies in the social economy. The « research » dimensions of the project allowed them to develop a rational argument which was validated - logically - by the action taken, especially when taken on a large scale.

To accomplish their second objective, the institutional entrepreneur primarily relies on their reasoning, through which they can express their vision but also signal to any potential allies that they share their concerns, values and a shared language. As such, VISES was careful to use the standard language of the impact community - this would facilitate dialogue with these participants, who could then become allies and/or take a position in the full knowledge of their situation.

The widespread distribution of an alternative vision requires its uptake (even partial) by a number of strategic allies.

THE VISES PROJECT USES ORAL AND WRITTEN REASONING IN SEVERAL WAYS TO SHARE ITS ALTERNATIVE VISION.

At the beginning of the project, THESE OPPORTUNITIES TO PROMOTE THE VISION WERE CREATED BY THE CONSORTIUM ITSELF.

Gradually, THE VISES PROJECT BEGAN TO RECEIVE INVITATIONS TO COME AND PRESENT THE PROCESS AND ITS INITIAL RESULTS.

It is truly remarkable how this project could promote its vision among extremely divergent circles : with federations and networks not directly involved in the project (or little-affected by the issue of social impact), with financial backers, with uninvolved researchers, with political leaders, with student audiences, etc.

Of course, it is far too early to see any changes resulting from the alternative vision promoted by VISES. We expect to see two types of effect over the coming months: **Firstly**, we should see the distribution of the recommendations from the VISES process among the impact community (see above); **secondly**, by presenting the VISES project, the project partners are promoting the specific qualities and aspects of the companies operating in the social economy. It would not be surprising to see these special characteristics return to the foreground. We can already see evidence of this with the new social entrepreneurship platform in place in Belgium, which is an initiative by the Palais Royal (called Be.impact). Among its entry criteria for companies, they list the capacity of a company to document its impact (with freedom to choose their method) and the priority given to their social objective or mode of governance (characteristics of the social economy).

Finally, if we are looking for evidence that the VISES project is beginning to change its environment, bear in mind that the project partners have confirmed how much the action-research project has helped create or reinforce their community. It cannot be overlooked that this community is part of each company's environment.

The partners learned to work together, developed a shared position on an issue which is important to them and acknowledged their differences and similarities - both in terms of their ideas and their practices. They saw how a shared position gave them a louder voice and, as such, how a closer community could give them a better chance of influencing their wider surroundings.

They also worked together on a large-scale project, supporting each other in the face of adversity (for example, with the implementation of collective support processes) and greatly improved their trust in one another, paving the way for potential future collaborations (institutional mergers, new research projects).

Perspectives

RECOMMENDATIONS TO WIDEN OUR HORIZONS

Beyond justifying the major methodological choices for the project (section 1), the description of how they were implemented in the real world (section 2) and an initial analysis of their consequences (section 3), we now want to make three recommendations and present them as potential avenues for further progress, both for the SE sector and the academic world at large.

1 ENCOURAGING PERSONAL AND INSTITUTIONAL AGILITY

Firstly, an action-research project on the scale of the VISES project requires personal and institutional agility. Each participant must be able to leave their comfort zone, so it's only natural that this type of project attracts more reflexive participants and more highly engaged researchers from the outset. If we want to promote action-research as a solution, we must therefore prioritise reflexivity in the active participants and engagement in the researchers. Through their participation in these projects, these skills and qualities will develop and allow both sides to gradually form a community. The inherent legitimacy that each starts with at the outset will, little by little, be reinforced by the legitimacy they acquired along the way. The participant will become more confident about producing knowledge, while the researcher will learn to be more involved. They will end up forming a coherent collective, and through this a popular, democratic form of science will emerge.

> THIS INVOLVES BUILDING A COMMUNITY, FORMING A COHERENT COLLECTIVE, AND HELPING DEVELOP A POPULAR, DEMOCRATIC FORM OF SCIENCE.

Although they are integrated, however, we must not forget that each party has a specific role to play: the researcher must maintain their distance when analysing and working with the more traditional research frameworks, while the participant in the field must use the skills they have co-developed to support their activities.

This dual-action (integration and specialisation) also requires institutional agility. The current standards and reference frameworks in academics and within the sphere of the social economy (financing mechanisms, evaluation methods) are not yet sufficient for researchers and participants to launch a successful action-research process on their own.

Researchers who co-develop their knowledge alongside the participants in the field are still seen as second-class researchers, wasting their time and not publishing enough (or fast enough), and companies working to build their knowledge with the academic world are still seen as abandoning their core activities for something unproductive and financially non-viable.

2 RECOGNISING THE SOCIAL ECONOMY AS A NATURAL LABORATORY FOR ACTION-RESEARCH PROJECTS

Secondly, action-research seems particularly appropriate for use in the social economy, for three reasons. **Firstly**, an action-research project requires a shared assessment of the situation and new, prospective scenarios. It requires action in the search for knowledge (even though there may be feedback loops). Companies and individuals in the social economy see themselves as forces for social innovation, alternative players in the field, and participants in the transformation of society. They are driven to provide a response to the challenges faced by society.

Next, action-research relies on reflexive participants who are able to work as part of a common project. Companies in the social economy are usually highly democratic and participation-focused companies, with a strong culture of discussion and debate.

Lastly, the VISES project has highlighted the benefits of integrating an intermediary category into an action-research project (support personnel, appointed by federations or network coordinators), who are able to interact with the both the researchers and the participants (the companies). Indeed, since the project has concluded, these federations and network coordinators have been clear in their desire to stick with this kind of process.

3 FACILITATING THE EMERGENCE AND CONTINUITY OF FROM THE ACTION-RESEARCH PROCESS

Thirdly, while action-research projects are by their nature time-limited processes (primarily limited by their financing schedule), we must not neglect the pre- and post-project phases. At the beginning, action-research projects stem from a « need to act ». With the VISES project, a number of federations/ network coordinators within the social economy were the instigators, expressing the need to act and laying the groundwork for the project. Ideally, the project would be co-developed by the various parties involved. This would however mean facilitating and multiplying the meetings between the participants and researchers. Financing options for the pre-project phase could also be developed, helping bring about shared projects and initiatives.

However, we should not forget about the post-project phase. « *All action-research projects generate a multitude of questions and define a number of research questions which will exceed what can realistically be studied during the action-research project itself* ». (Liu 1992, p. 304). Within the VISES project, a number of questions emerged: how can we document the relationship with the surrounding area? How can we evaluate the collective impact of several participants on a local area? How can we build indicators around social aspiration? These questions have been formed by a learning community, and could potentially be researched by some of its members. The need to act remains, and these issues may well motivate them. By supporting these post-project initiatives, we can give this community the perspective it needs to produce knowledge through action and benefit their communities.

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THE CRESS

The CRESS is a public utility association tasked with ensuring the local promotion and development of the social economy, under the terms of article 6 of the framework law from the 31 July 2014 concerning the social economy.

CONCERTES

Concertes is a coordination platform for the organisations representing the social economy in French-speaking Belgium (Wallonia and Brussels).
It is designed to represent, defend, promote and research the social economy.

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In France and Belgium, there is a slight difference in the translation of « social economy ».

In the French-language document, the term « économie sociale et solidaire » will be used.

Leader and coordinators

Project Partners

Associate Partners

Supported by

CONTACT

www.projetvisesproject.eu

contact@projetvisesproject.eu

With the support of the European Regional Development Fund

CRESS : 3-5 Rue Camille Guérin, 59 000 Lille
ConcertES : Einstein Business Center / Parc Scientifique de Louvain-la-Neuve
Rue du Bosquet, 15A, 1435 Mont-Saint-Guibert

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