



MEDTOWN

SARH International for consulting and training

MEDTOWN

Co-producing social policies with SSE actors
to fight poverty, inequality, and social
exclusion

Training Toolkit

Co-production, a model for fair and sustainable societies



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1.1 About the project

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1.3 The Situation of Planet Earth

Planetary Boundaries

- It is the framework that defines a safe operating space for humanity based on the intrinsic biophysical processes that regulate the stability of the Earth system. The boundaries framework defines nine global priorities relating to human-induced changes to the environment.
- It is the science that shows that these nine processes and systems regulate the stability and resilience of the Earth System – the interactions of land, ocean, atmosphere and life that together provide conditions upon which our societies depend.



Living Within Planetary Boundaries

- For human civilization to remain prosperous in the future and allow future generations to develop in good conditions, it is essential to transform human activities so that they adapt to the natural limits that characterize our planet.
- **To do this**, all the activities we carry out (from education, production processes, use and disposal of products and flows of energy and resources, leisure time, the way in which we move around the territories, etc.) must take into account these planetary limits and corrected when the impact they generate exceeds safe levels for our survival.
- In recent years, the theory of the **“Doughnut Economics”** has emerged, stating that our economic model must be integrated between two bands:

1) An upper one delimited by planetary limits.

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- 2) A lower one that represents a minimum for people to cover their basic needs & decent living conditions are ensured.

Ecological Footprint & Biocapacity

- **The Ecological Footprint** is the only metric that measures how much nature we have and how much nature we use. Ecological Footprint accounting measures the demand on and supply of nature.
- **On the demand side**, the Ecological Footprint measures the ecological assets that a given population requires to produce the natural resources it consumes (including plant-based food and fiber products, livestock and fish products, timber and other forest products, space for urban infrastructure) and to absorb its waste, especially carbon emissions. The Ecological Footprint tracks the use of six categories of productive surface areas: cropland, grazing land, fishing grounds, built-up land, forest area, and carbon demand on land.
- **On the supply side**, a city, state or nation's biocapacity represents the productivity of its ecological assets (including cropland, grazing land, forest land, fishing grounds, and built-up land). These areas, especially if left unharvested, can also absorb much of the waste we generate, especially our carbon emissions.
- **Both the Ecological Footprint and biocapacity** are expressed in global hectares—globally comparable, standardized hectares with world average productivity. Each city, state or nation's Ecological Footprint can be compared to its biocapacity.
- If a population's Ecological Footprint exceeds the region's biocapacity, that region runs an **ecological deficit**.
- Its demand for the goods and services that its land and seas can provide—fruits and vegetables, meat, fish, wood, cotton for clothing, and carbon dioxide absorption—exceeds what the region's ecosystems can renew. A region in ecological deficit meets demand by importing, liquidating its own ecological assets such as overfishing, or emitting carbon dioxide into the atmosphere.

➔ If a region's biocapacity exceeds its Ecological Footprint, it has an **ecological reserve**.

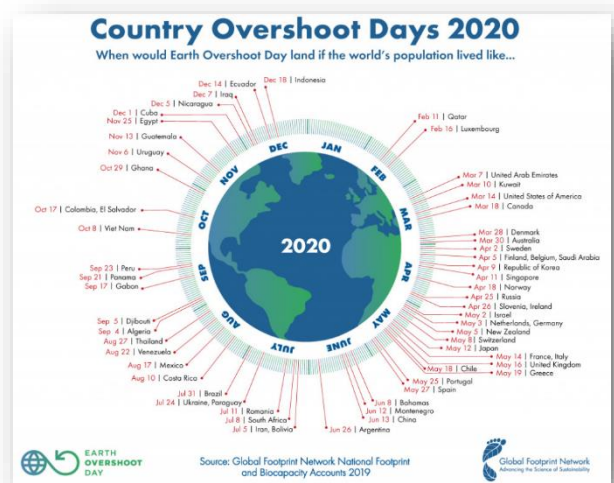
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“Earth Overshoot Day marks the date when humanity’s demand for ecological resources and services in a given year exceeds what Earth can regenerate in that year. In 2020, Earth Overshoot Day happened on August 22th, but each country has a different responsibility and impact. We maintain this deficit by liquidating stocks of ecological resources and accumulating waste, primarily carbon dioxide in the atmosphere”.

1.2. Human Needs and Sustainable Human Development

Human needs are commonly used to refer to the drivers of peoples’ actions, the motives behind human behavior. Other uses of the concept include needs as instruments to achieve a certain goal and needs as societal requirements to flourish or experience a good life.



- Needs as motives imply that all human actions can be understood as originating in the quest for satisfying or actualizing needs.
- Needs as societal requirements concern what is necessary for people to avoid serious harm and participate in their society, whether or not they are mobilized by them.

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- Needs as requirements to achieve a certain outcome like fulfillment, happiness, or satisfaction fall in between the two last explanations. They take the elements that contribute to achieving the goal of a good life such as jobs, income, health care, status as the requirements or needs for the realization of the goal.



Sustainable Development by United Nations

- The 2030 Agenda for Sustainable Development, adopted by all United Nations Member States in 2015, wants to provide an official shared blueprint (framework) for peace and prosperity for people and the planet, now and into the future.
- At its heart are the 17 Sustainable Development Goals (SDGs), which are an urgent call for action by all countries – developed and developing – in a global partnership. They recognize that ending poverty and other deprivations must go hand-in-hand with strategies that improve health and education, reduce inequality, and spur economic growth – all while tackling climate change and working to preserve our oceans and forests.
- Promoting exponential economic growth in a finite planet, while tackling the increase of inequalities and the ecological and climate crisis, is impossible, as we will see during the course. Despite these and other limitations and incoherences, the SDGs are probably the

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most important international and official framework connecting human needs with sustainable development. Each SDGs identify a human need for sustainable development.

1.3. Social-ecological Resilience

“Our planet is deeply marked and influenced by our presence”.

- Scientists argue we have entered the Anthropocene, a geological epoch where there are now so many of us, using so many resources that we are disrupting the whole planet’s nutrient and energy flows leaving almost all the planet’s ecosystems with marks of our presence.
- The systems that are shaped by the interactions between people and ecosystems are the essence of what we call a social-ecological system.
- *“A resilience thinking approach investigates how these interacting systems of people and nature can best be managed in the face of disturbances, surprises and uncertainty. We define resilience as the capacity of a system, be it an individual, a forest, a city or an economy, to deal with change and continue to develop”.*

2.1. Social Services and Public Policy

Public Policy

‘Anything a government chooses to do or not to do’. (Dye, 1972: 2).

- Probably the best-known, simple and short definition of public policy has been offered by Thomas Dye.
- Public policies are embedded in complex systems. A complex system is one in which diverse agents linked in networks interact selectively following simple rules (that is, not necessarily optimizing) without centralized control, and from which emerges (often unpredictable) patterns, structures, uses and functionalities (that may be desirable or not), and do so continually, never settling on definitive equilibria, but always learning, adapting and evolving.
- Sometimes, policies enacted to benefit special interests produce disastrous social results. For example, opening public lands to oil, timber, and mineral corporations has harmed people and environments if appropriate safeguards are not in place

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Social Policy

- A welfare state is a state that is committed to providing basic economic security for its citizens by protecting them from market risks associated with:

*Old age * Unemployment

*Accidents * Sickness

- Social policy is how a society responds to social problems. Social welfare policies often compete with economic, political, and defense needs for attention and resources.
- The public economy supports employment, in both high income and developing countries, through:
 - 1) Direct employment of public service workers.
 - 2) Indirect employment of workers by contractors supplying outsourced goods and services.
 - 3) Employment of workers on infrastructure projects.
 - 4) Extra demand from the spending of the wages of these workers and also of recipients of social security benefits (*the “multiplier effect”*).
- The combined effect of these mechanisms supports half the formal jobs in the world. Additionally, public subsidies have supported employment by private companies through recessions, or by providing employment guarantees.
- The public sector also supports the quality of employment by providing formal direct jobs with decent pay and conditions; using procurement rules to require “fair wages” from private contractors, to reduce gender and ethnic discrimination, and to strengthen formal employment of local workers.
- Public services also improve equality, because public sector provision reduces the extraction of profit, and because the value of public services themselves adds most to the effective income of poorer households.

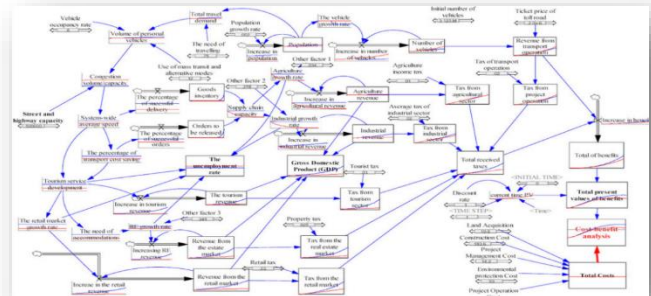
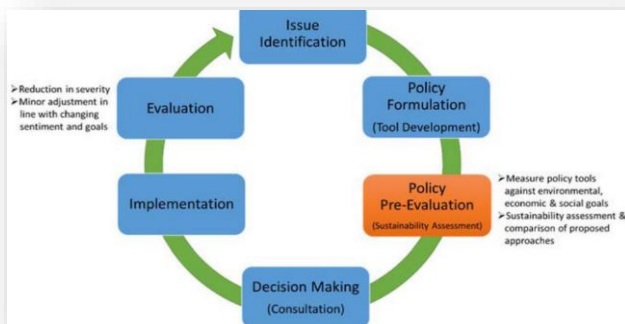
Policy Design

- The thinking behind the standard approach to policy making follows the *reductionist view* that dominates much of science.
- **Reductionism** assumes that to understand a large and complicated matter, one can break it into smaller and more easily understood components.

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- Once these are understood, the pieces are put together to reveal the working of the whole. It requires the whole to be simply the sum of the parts. In other words, it requires the relationship between the parts to be linear.
- **But in complex systems** there is often no proportionality between cause and effect. Often large causes can have no impact, such as a lake that receives considerable runoff from agriculture and other human uses, yet continues to be clear and sustain life.
- If actors are susceptible to a wide variety of biases, it becomes much harder to foresee how they will react to different incentives and constraints in different circumstances. A classic example of this: rational agents would be expected to increase donations if offered economic incentives, in many cases payment was found to be a barrier for donations.



“How it is expected to work”

“How it actually works”

Policy Implementation

“New Public Management” (NPM)

- A school of thought which argued that shortcomings in public service operations could be overcome by introducing business-style management approaches and practices such as;
 - 1) Strategic planning
 - 2) Management by objectives

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3) *Incentive-based reward systems*

into the administration of the public sector, and favored outsourcing many government services to non-governmental private and nonprofit organizations through contracts.

- However, NPM has been criticized for focusing on what happens “inside” organizations, instead of responding to an environment where organizations are increasingly plural and fragmented.
- Also, it is based on the application of outdated business-like techniques to public policy implementation and public services delivery, despite growing evidence that they do not work well.

➔ NPM emphasizes reliance on market mechanisms to assume functions formerly performed by governments.

New Public Governance (NPG)

- Emerged in response to NPM, to propose both a plural state, where multiple interdependent actors contribute to the;
 - 1) *Delivery of public services.*
 - 2) *Pluralist state (where multiple processes inform policy-making processes).*
- It focuses upon;
 - 1) *Interorganizational service networks and the role of government in orchestrating a wide range of third parties.*
 - 2) *Stressing service effectiveness and outcomes that emerge as a result of interactions between public service organizations and their environments.*

➔ NPG emphasizes the significant strengths that nonprofit organizations can bring to the delivery of public services.

Considerations in Policy: Gender & Climate Change

- Policies are important in areas ranging from protection from violence and discrimination to access to public services. But the way in which policies are designed and implemented is determined, in part, by participation in politics.

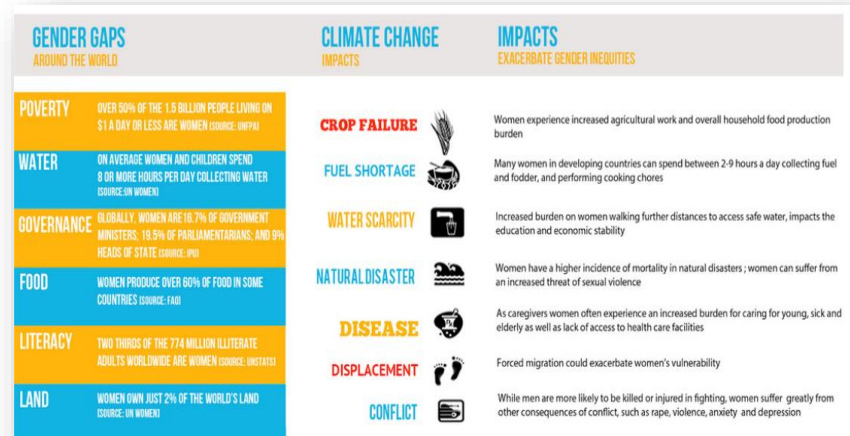
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- Social exclusion happens when people are unable to fully participate in economic, social and political life because they are excluded on the basis of cultural, religious, racial or other reasons.
- Gender remains one of the most prevalent bases of discrimination. Policies addressing deep-seated discriminatory norms and harmful gender stereotypes, prejudices and practices are key for the full realization of women's human rights.

The 2018 Report of Intergovernmental Panel on Climate Change

- The special report of the 2018 Intergovernmental Panel on Climate Change discusses place-specific adaptation pathways as opportunities for addressing structural inequalities, power imbalances and governance mechanisms that give rise to and exacerbate inequalities in climate risks and impacts.



- **But the report warns that** such pathways can also reinforce inequalities and imbalances. Adaptation narratives built around self-reliance, for example, may intensify climate burdens on poor people and marginalized groups.

➔ Excluded groups can be **effective drivers** of their own change by forming or participating in organizations that represent group interests. Civil Society Organizations play an important role in conducting research to raise the profile of excluded groups.

2.2. Agents and Roles

The State

- **Liberal welfare states** include many benefits, such as health insurance and pensions, are linked with employment. Means testing is used to determine eligibility for state services, and relatively cash and voucher benefits are provided for those deemed eligible.
- **Conservative/corporatist welfare states** rely on state provision of services, rather than on private provision. These states often manifest normative ideals of a nuclear family characterized by a male breadwinner and a woman who tends to the family.

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- **Social democratic welfare states** promote a vision of the state as the guarantor of social rights. These states promote equality of benefits at high levels as a way of minimizing the effects of social class and income. Welfare benefits are used to equalize the ability of all citizens, to participate in the political community
- This public sector activity, directly and indirectly, supports half the formal jobs in the world, and has a comparative advantage in delivering public goods such as;
 - * *Universal access to healthcare*
 - * *Affordable housing*
 - * *Protecting the planet from climate change.*
- The need for public services and public spending is expected to grow globally due to continuing economic development, climate change, **but** this depends on the outcome of **political processes (ibid)**.

The Private Sector

- The ways in which the private sector may contribute to national development are broad, but can fall under the following:
 - * *Job creation and employment.*
 - * *Contribution to national income.*
 - * *Delivery of critical goods and services.*
 - * *Equity financing.*
 - * *Tax revenues.*
 - * *Royalties.*
 - * *Engagement in a range of social interventions through the lens of Corporate Social Responsibility (CSR) initiatives.*
 - * *Efficient flow of capital for production.*

➔ An increasingly common form of social contracting of for-profit organizations in Europe is through **contractual Public Private Partnerships (PPPs)**.

Contractual Public Private Partnerships (PPPs)

- An agreement between the government and one or more private partners according to which the private partners deliver the service in such a manner that the service delivery objectives of the government are aligned with the profit objectives of the private partners and where the effectiveness of the alignment depends on a sufficient transfer of risk to the private partners.

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- The nine sectors which are most often subject to privatization, outsourcing and Public-Private Partnerships are;

*Buses	* Electricity
*Healthcare	* Ports
*Prisons	* Rail
*Telecoms	* waste management
*Water	

- It is widely assumed that privatization or Public-Private Partnerships (PPPs) will result in greater levels of technical efficiency. That is, the private sector should always deliver a given level of service with less input costs than the public sector.

➔ However, privatizing services in the energy, water supply and waste management sectors are likely to **negatively affect** the quality-of-service supply and end up increasing prices for urban residents.

- De-privatization initiatives and potential conflicts related to them are frequently driven by grassroots organizations promoting the provision of commons-based urban services.

Civil Society

- Civil Society Organizations (CSOs)** can provide both immediate relief and longer-term transformative change by;

- 1) *Defending collective interests and increasing accountability.*
- 2) *Providing solidarity mechanisms and promoting participation.*
- 3) *Influencing decision making; directly engaging in service delivery.*
- 4) *Challenging prejudice.*

- The last two decades have witnessed significant changes in civil society and the nonprofit sector that include substantial growth in the size and importance of the sector in many countries, especially as a delivery mechanism for public services, and in the contribution, it makes to community building.

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- It is increasingly recognized that civic engagement creates social capital, which contributes to a better functioning of the society, economy and political system. Nonprofit associations, which;
 - 1) *Form the social infrastructure of civil society.*
 - 2) *Manifest this engagement.*
 - 3) *Facilitate the creation of trust, social inclusion & communal responsibility.*
 - **Nonprofit organizations** have significant advantages over public services providers including unique knowledge deriving from;
 - *Proximity to distinctive user groups. *Greater capacity for tailoring holistic services.
 - *Flexibility. *Ability to innovate.
 - *Advantages for promoting social values. *Capacities to democratize public services
 - *Expertise in mobilizing volunteers & private charitable resources.
 - Furthermore, nonprofits offer insights into the challenges that organizations in civil society face through;
 1. *Promoting the voices & interests of vulnerable populations.*
 2. *Maintaining their own integrity & sustainability.*
 3. *Promoting voluntarism & civic activism.*
 4. *Building & strengthening civil society as an alternative public sphere.*
- ➔ They also highlight innovative ways in which diverse actors in civil society respond to these challenges.
- Representing the interests of vulnerable groups (e.g., people with disabilities, single mothers, etc.).
 - NPOs are helpful in designing the services, since they are most familiar with the needs of the target groups.

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- NPOs can provide complementary services, services to under-served groups of people in need for social services & piloting new services that in the future the government might adopt.

➔ Advantages of Civil Society as service providers (ibid):

- *Close to the problems
- *Have specialist expertise
- *Provide higher quality services
- * A source of innovation
- *Flexible
- *Bring in additional resources

2.3. Co-Production: Levels, Types and Models

Definitions of Co-Production

- Economists from the 1970s who studied collaboration between government departments and citizens, showing that effective service delivery was encouraged by collaboration between professional providers and service users, rather than central planning.

Co-production

- It is an approach to decision-making and service design. It rejects the traditional understanding of service users as dependents of public services. Just like users need the support from public services, so service providers need the insights and expertise of its users to and build effective services.
- It goes well beyond the idea of 'citizen engagement' or 'service user involvement' to foster the principle of equal partnership. It offers to transform the dynamic between the public and public service workers, putting an end to 'them' and 'us'.

➔ It is a process that literally turns services users from passive recipients into active shapers of public services because it means involving all stakeholders.

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- It is easy to spot the difference between individual co-production and collective co-production. Individual co-production describes those situations where a client or a customer, individually or in a group, participates in the production or part-production of the services they use, receiving 'benefits that are largely personal'.

THE CUTS SCENARIO which uses substitutive co-production	THE TRANSFORMATION SCENARIO which focuses on additive co-production
Here the primary intention is to save money and/or reduce staff: the public sector hands responsibility for services over to service users and/or communities. 	Here, public sector resources are combined with individual and community resources, providing new opportunities for participation and co-operation. 

Collective co-production builds on the idea that co-production is not confined to users, but involves other types of people, such as citizens, volunteers or non-governmental partners. This type of co-production is designed to produce benefits for the entire community.

The Three Levels of Co-Production

The extent of co-production varies but it can be organized into three tiers

- ***Compliance (descriptive):*** People using services make contributions at each stage of service provision but they are not involved in implementation. Despite the awareness that care services cannot be produced without input from the people who use services. Here, Co-production offers little opportunity for real change by or for the people who use services because it is about complying with an existing regime.
- ***Support (intermediate):*** The intermediate level of co-production recognizes and values the many people who come together to co-produce care services. It acknowledges the input and value of service users, utilize existing support networks and improves channels for people to be involved in the shaping of services.

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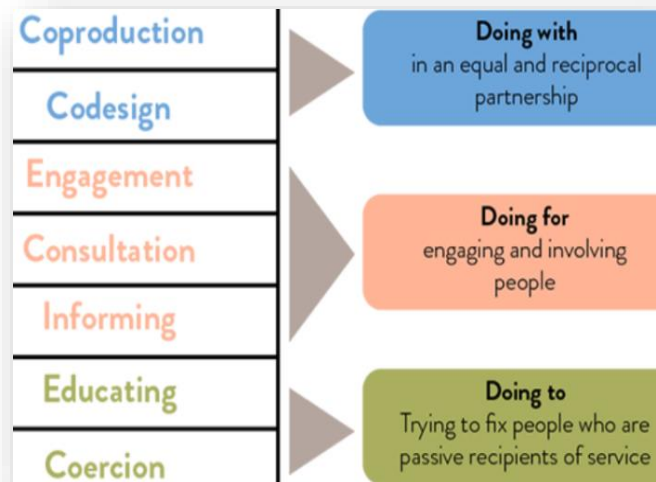
- Transformation:** The most effective methods of co-production can transform services and create new relationships between the people who use them and staff. This transformative level of co-production takes “a whole life focus”, incorporating quality of life issues as well as simply clinical or service issues.

		Responsibility for design of services		
		Professionals as sole service planner	Professionals and service users/ community as co-planners	No professional input into service planning
Responsibility for delivery of services	Professionals as sole service deliverers	Traditional professional service provision	Professional service provision but users/communities involved in planning and design	Professionals as sole service deliverers
	Professionals and users/communities as co-deliverers	User co-delivery of professionally designed services	Full co-production	User/community delivery of services with little formal/ professional
	Users/communities as sole deliverers	User/community delivery of professionally planned services	User/community delivery of co-planned or co-designed services	Self-organised community provision

- At this stage the service user becomes an expert. Professionals and people who use services and their careers come together to identify and manage risks. There must be trust and respect on both sides.



To reach this stage there must be reallocation of power and control through user-led planning, delivery, management, empowerment and governance and collaboration must be entrenched. It often requires organizational change.



2.4. Opportunities and Challenges

Opportunities

- *Added value
- *Using the expertise of service users
- *Practical skills
- *Health benefits and prevention
- *Social capital

Challenges

- 1) Difficult to manage well when dealing with larger groups

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- 2) Exclusive & unrepresentative to uninvited users
- 3) Considerable time commitment
- 4) Building social capital: *It is possible that co-production schemes can sideline already marginalized groups as there are limits to the extent that some people can co-produce without support. Issues of social exclusion, equality and diversity need to be taken into account.*

➔ *There is also an awareness that co-production **should not be a method** for governments to dump its problems on the community and service users.*

- 5) Challenges to existing frameworks: *Statutory authorities' tendency to risk aversion, as well as tax and benefit regulations, can create problems for co-productive initiatives. Also, accountability can be threatened as private and public, formal and informal, budgets that were previously separate become entwined.*
- 6) Security and independence: *There can be concerns about the long-term sustainability of projects as many co-production initiatives want to be independent, relying on funding that is often short-term and unstable.*
- 7) Staff support: *For co-production to work effectively staff and service users must be empowered.*
- 8) Training & staff development: *there is a need for training and staff development to support co-productive approaches. There should be clear support for positive risk taking and staff should be encouraged to seek out opportunities for collaboration.*

3.1. Impacts of the current economic system and alternatives

- This indicator shows the economic balance generated by countries **but hides** many aspects that may reflect that country or region is not as prosperous as it seems: inequality, pollution and destruction of the environment, lack of education, security, well-being, etc.
- Within economic geography there is an overarching belief that the formal neo-liberal market is the predominant form of economy and that even those countries that do not operate such a system are moving towards it.

➔ *However, there is a battery of economic models and practices, of a formal and informal nature, that propose alternatives to the dominant economic model and that put people and planet care above the economic balance.*

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- Social & solidarity economy as a very appropriate economic model for co-production processes, **also other alternative models exist:**

*The Wellbeing Economy

* Circular Economy

*Economy for the Common Good

* Popular Economy and Informal Economy

*Organic / Green / Fair Trade

* Consumer practices

*Sharing Economy

* Gift Economy

The Wellbeing Economy

- The economic system that dominates the world has lost the capacity to effectively organize and distribute resources & to care for the natural world.
- Economics and business practices need to be reoriented to what an economy should actually deliver: an equitable distribution of wealth, health and wellbeing, while protecting the planet's resources for future generation & other species.

Issue area	OLD WAY: Current system response(s)	NEW WAY: Indicative Wellbeing Economy response(s)
Climate crisis and communities	<ul style="list-style-type: none"> • Carbon capture and storage and emergency responses to 'natural' weather-related disasters • Low income communities most affected by climate crisis and bear most of the costs • Communities expected to increase their resilience 	<ul style="list-style-type: none"> • Circular economy principles in • manufacturing and resource use • Community-based renewable energy generation • Climate crisis mitigated • Climate justice to ensure the burden of adaptation and mitigation is shouldered by those most responsible
Purpose of the Economy	Increasing per capitaGDP	<ul style="list-style-type: none"> • Holistic measures of progress that encompass human and ecological wellbeing, including of future generations • Co-creation of these measures through wide public consultation
Mindsets	The dominant mindset is that there is no alternative to neoliberal capitalism and business as usual	<ul style="list-style-type: none"> • The dominant mindset is that thousands of alternatives for designing economies exist – it is in our power to design economies differently. Economies should have human and environmental wellbeing as their focus • Innovation is the norm

CIRCULAR ECONOMY

- **It is a regenerative system**, in which resource input and waste, emission, and energy leakage are minimized by slowing, closing, and narrowing material and energy loops. CE

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is not bound by a specific socio-technical system, but entails a transformation of all production and consumption processes.

- ***In the business world***, Circular Economy has mostly shaped practices in waste management and recycling, while practices of reusing or remanufacturing materials and systematically reducing material consumption are still rare.



Nevertheless, some companies are increasingly working towards extending their products' life cycle by offering maintenance and repair services.

Economy for The Common Good

- According to Aristotle, the prevalence of common good over profitability is the expression of a true “oikonomia” (Economy), whereas the prevalence of profit over the common good as its opposite: “chrematistiké” (Chrematistics).
- It translates standards for human relationships as well as constitutional values into an economic context & rewards economic stakeholder for behaving & organizing themselves in a humane, cooperative, ecological & democratic way.

The basic functioning is as follows (ECG website):

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- **Businesses produce a Common Good Balance Sheet:** Using the Common Good Matrix, results show a company's contribution to the Common Good. It becomes clear how fair, sustainable and transparent they are.
- **Products receive an ECG label with the Common Good score:** This allows customers to make truly informed decisions about the products and services they buy and consume.
- **Economic policies provide ECG businesses with advantages:** Through taxation and incentives, ECG businesses become price competitive and are more successful in the market.

STAKEHOLDER	HUMAN DIGNITY	SOLIDARITY AND SOCIAL JUSTICE	ENVIRONMENTAL SUSTAINABILITY	TRANSPARENCY AND CO-DETERMINATION
A: SUPPLIERS	A1 Human dignity in the supply chain	A2 Solidarity and social justice in the supply chain	A3 Environmental sustainability in the supply chain	A4 Transparency and co-determination in the supply chain
B: OWNERS, EQUITY AND FINANCIAL SERVICE PROVIDERS	B1 Ethical position in relation to financial resources	B2 Social position in relation to financial resources	B3 Use of funds in relation to social and environmental impacts	B4 Ownership and co-determination
C: EMPLOYEES, INCLUDING CO-WORKING EMPLOYERS	C1 Human dignity in the workplace and working environment	C2 Self-determined working arrangements	C3 Environmentally-friendly behaviour of staff	C4 Co-determination and transparency within the organisation
D: CUSTOMERS AND OTHER COMPANIES	D1 Ethical customer relations	D2 Cooperation and solidarity with other companies	D3 Impact on the environment of the use and disposal of products and services	D4 Customer participation and product transparency
E: SOCIAL ENVIRONMENT	E1 Purpose of products and services and their effects on society	E2 Contribution to the community	E3 Reduction of environmental impact	E4 Social co-determination and transparency

- The key instrument for this behavioral guidance is the Common Good Balance Sheet. According to Felber, it makes much more sense for companies to create a so-called "common good balance sheet" than a financial balance sheet. The common good balance sheet shows the extent to which a company abides by values like human dignity, solidarity and economic sustainability. The Common Good Balance guides the behavior of companies without creating the need for additional regulation requirements.

Popular Economy and Informal Economy

- The informal/popular sector of the economy is very important many people, in the global South, depend on it for their livelihoods. For example, three-quarters of the population in Mali are involved in the informal economy. The popular economy consists of economic activities that are not covered by formal arrangements such as taxation, labor protections, minimum wage regulations, unemployment benefits, or documentation.

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- The popular economy is not the same as the solidarity economy, but is aligned in many ways because the actors often find collective ways to provide for social and economic needs, such as;
 - *Lending circles
 - *Community kitchens
 - *Mutual aid
 - *Mutual insurance systems

Organic, Green, Fair Trade

There are many trends that reflect solidarity values and yet may or may not be included in the solidarity economy. Yet there are certainly practitioners in these sectors that are valuable allies and others that are already part of the social solidarity economy.

Consumer Practices

Consumer practices are an important tool to transform the system of production. These include forms of collectively organized consumption such as;

- *Consumer co-operatives
- *Community Supported Agriculture (CSA)
- *Solidarity purchasing groups
- *Collective kitchens

Sharing Economy

- It is an economic model defined as a peer-to-peer (**P2P**) based activity of acquiring, providing, or sharing access to goods and services that is often facilitated by a community-based on-line platform.
- The emergence of the Internet has made it easier for asset owners and those seeking to use those assets to find each other. This sort of dynamic can also be referred to as the **shareconomy, collaborative consumption, collaborative economy, or peer economy**.

Gift Economy

- Refers to economic activity characterized by offering services and goods to other members of the community without the expectation of monetary reward purely based on altruism, a wish to gain status in society, the hope of reciprocal gifts in the future or out of a sense of mutual obligation.
- The gift economy recognizes that in the real world, this is only a partial understanding of what motivates individuals and communities. The gift economy places greater value on qualitative relationships between dependent people. The commodity economy places greater value on quantitative trade of goods.

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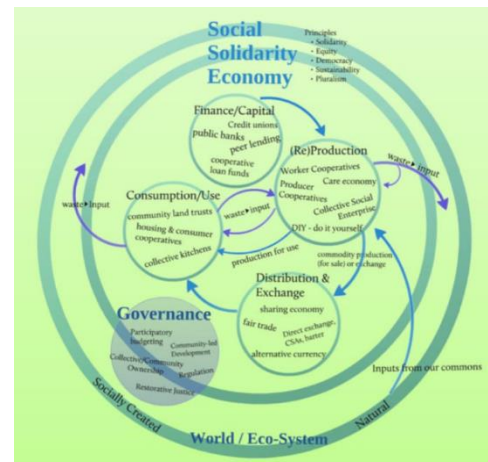


3.2. Social Solidarity Economy

- It is the result of a set of processes that involves its culture, values, education, technological evolution, history, social organization, political structure and legal systems, as well as its geography, natural resource endowment, and ecology, as main factors. These factors give context, content, and set the conditions and parameters in which an economy function.

➔ In other words, the economic domain is a social domain of human practices and transactions. It does not stand alone.

- It is an alternative to capitalism and other authoritarian, state-dominated economic systems. In SSE ordinary people play an active role in shaping all of the dimensions of human life: economic, social, cultural, political, and environmental. SSE exists in all sectors of the economy production, finance, distribution, exchange, consumption and governance.
- SSE is not only about the poor, but strives to overcome inequalities, which includes all classes of society. SSE has the ability to take the best practices that exist in our present system (such as efficiency, use of technology and knowledge) and transform them to serve the welfare of the community based on different values and goals.
- The International Labor Organization (ILO) Regional Conference on Social Economy (October 2009) defined the Social and Solidarity Economy (SSE) as a “concept designating enterprises and organizations, in particular cooperatives, mutual benefit societies, associations, foundations and social enterprises, which have the specific feature of producing goods, services and knowledge while pursuing both economic and social aims and fostering solidarity”.



➔ ***As SSE actors, we should not romanticize ourselves as “being good”. We should actively re-create our aspirations, and learn to prevent the reproduction of sexism, racism, homophobia, classism and other sources of discrimination and oppression. SSE seeks systemic transformation that goes beyond superficial change in which the root oppressive structures and fundamental issues remain intact.***

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The social economy is mitigating impacts of COVID-19 crisis & government responses

- Social economy organisations are particularly successful in reaching out to the vulnerable groups and re-integrating them into the society, thus filling some of the voids left by the state and the market. This is because they are locally anchored and their core purpose is **socially driven**.
- The social economy saves future costs or reduce the negative externalities of economic activities. Such cost savings often concern public expenses, for example in healthcare (by preventing disease) or unemployment benefits.
- The social economy allows a better allocation of resources in the provision of some services and goods. Social economy produces additional positive effects on public expenses, on individuals on territories and on society.
- These mitigating and prevention functions make the social economy a natural and trusted partner of government and civil society more generally. They collaborate to complement public action in specific areas. This partnership is especially appreciated during times of crisis, wars or epidemics, because the social economy can act rapidly, develop partnerships in an effective manner through their networks, and act as a trusted partner.

SSE Values

- “Economy must allow men and women to satisfy their needs and ambitions, while providing for future generations to satisfy their own needs.” and “the development of human capacities is fundamental to the transformation of the world, and that this is possible through the creation of solidarity networks on different scales that contribute to the production & exchange of resources and knowledge, as well as the coordination of collective actions within the framework of a common project. “

A series of values that frame Social Solidarity Economy:

- | | | |
|---|---------------------------|--|
| *Humanism | * Democracy | * Solidarity |
| *Inclusiveness | * Subsidiarity | * Diversity |
| *Creativity | * Sustainable development | * Equality, equity and justice for all |
| *Respecting the integration of countries & people economy | | * A plural & solidarity-based |

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Commons

- Commons are resources are managed for the benefit of a community or the Earth. **Natural commons** include, clean air & water, although these are increasingly being privatized or used for private gain.
- **Socially-created commons** include things such as language, folk tales and Wikipedia. Thus, the term “commons” does not refer only to the protection of the environment, but also to social resources that support basic rights to health, education, equity and diversity. The commons **should never be** privatized. They must be managed by the State or the Community.

3.3. Entrepreneurship in Social Solidarity Economy

- The European Commission gives the term ‘**social enterprise**’ the following meaning: “an operator in the social economy whose main objective is to have a social impact rather than make a profit for their owners or shareholders.
- What distinguishes social enterprises from traditional associations or charities is the fact that social enterprises earn a substantial proportion of their income through trading, rather than being dependent on grants or donations. An indicator of this social purpose is that the majority of any profits are reinvested or otherwise used to achieve the social mission of the enterprise.
- The novelty introduced by social enterprises is their capacity to bring an entrepreneurial and commercial dimension to the provision of general interest services and to the solution of social issues. This ability enables these organizations to operate in a space that in many countries was previously thought of as solely purview of the public sector. Social enterprises have made it possible to provide social and general interest services in a way that is economically sustainable, and in many ways more effective and efficient than what could be done by the public sector alone.

Social Enterprises

- **European Commission:** A social enterprise is an operator in the social economy whose main objective is to have a social impact rather than make a profit for owners or shareholders. It operates by providing goods & services for the market in an entrepreneurial & innovative fashion & uses its profits primarily to achieve social objectives. It is managed in an open & responsible manner and, in particular, involves employees, consumers & stakeholders affected by its commercial activities.

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- Social enterprises may have some comparative advantages in provision of goods and services over both conventional private and public sector companies. They can provide manufactured goods and commercial services for the market, but also merit goods that markets may under-produce and consumers may under-demand because of a failure to perceive their long-term benefits, such as education, healthcare, work training programs, community care, access to energy, clean water, sanitation and communication technology & financial services.



3.4. Putting life in the center: Care Economy

- Care is necessary for the existence and reproduction of societies & the workforce and for the overall well-being of every individual. The very essence of having independent & autonomous citizens as well as productive workers relies on the provision of care.
- Care is broadly defined as consisting of activities and relations involved in meeting the physical, psychological and emotional needs of adults and children, old and young, frail and able-bodied.

Care activities are comprised of two broad kinds:

- Direct, face-to-face, personal care activities (*referred to as “nurturing” or “relational” care*), such as feeding a baby, carrying out health check-ups or teaching young children.
- Indirect care activities, which do not entail face-to-face personal care, such as cleaning, cooking & other household maintenance *tasks (referred to as “non-relational care” or “household work”)*.
- Unpaid care work is caring for persons without any explicit monetary compensation. The majority of unpaid care work in nearly all societies takes place within households, most often provided by women.
- Unpaid care & domestic work sustains families & communities on a day-to-day basis & from one generation to the next & makes a significant contribution to economic

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development by nurturing people who are fit, productive & capable of learning & creativity.



Yet, it remains invisible, undervalued and neglected in economic and social policymaking, and its distribution is grossly imbalanced: Globally, women do three times as much unpaid care and domestic work as men.

4.1. Organizational Governance for Co-production

- Governance is how society or groups within it, organize to make decisions. It determines who has power, who makes decisions, how other players make their voice heard and how account is rendered (IOG). Governance has often been defined in the context of exercising state power. Rather than politicize the concept, the International Labor Organization defines governance here as the exercise of institutional authority to determine the use of resources in the conduct of a society's affairs.

In accordance with the UN concept, good governance is supposed to be characterized by:

- | | | |
|-----------------------------------|-----------------------------------|---------------------------------|
| <i>*Accountable</i> | <i>*Transparent</i> | <i>*Responsive</i> |
| <i>*Effective & efficient</i> | <i>*Equitable & inclusive</i> | <i>*Follows the rule of law</i> |

The Council of Europe identified 12 principles of good governance at local level. They include:

- | | | |
|--|--|--|
| <i>*Responsiveness</i> | <i>*Efficiency & Effectiveness</i> | <i>*Openness & Transparency</i> |
| <i>*Rule of Law</i> | <i>*Accountability</i> | <i>*Competence & Capacity</i> |
| <i>*Innovation & Openness to Change</i> | | <i>*Sustainability & Orientation</i> |
| <i>*Sound Financial Management</i> | | <i>*Human Rights</i> |
| <i>*Cultural Diversity & Social Cohesion</i> | | <i>*Ethical Conduct</i> |
| <i>*Fair Conduct of Elections, Representation & Participation.</i> | | |

In relation to those principles for a good governance, it can be characterized by the following:

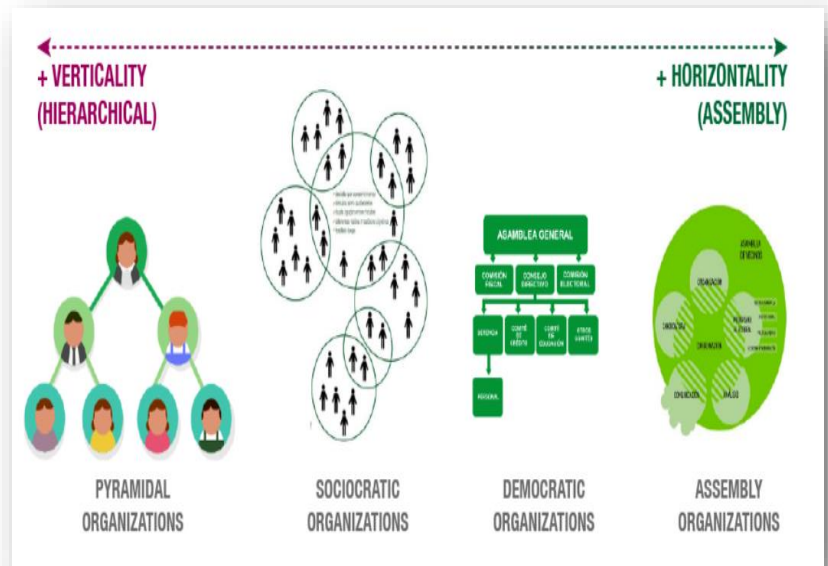
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- *Organizational structures: ownership, roles & responsibilities*
- *Participation levels & channels*
- *Decision-making processes*
- *Accountability & transparency procedures*

Organizational Structures

- There is a diversity of organizational structures that are determined by questions such as: how power is distributed, how responsibility is exercised among the people who participate in the organization, how accounts are presented and what types of transparency mechanisms exist.
- Based on these factors, a range can be defined from more vertical or pyramidal organizations to more horizontal organizations.



Participation & Decision-Making

Methods of Decision-Making:

- | | | |
|------------------|----------------|----------------|
| *Consultative | *Authoritarian | *By delegation |
| *Multiple winner | *Unanimously | *By majority |
| *Consensus | *By consent | |

Accountability & Transparency

- **This refers to** the function of gathering, compiling, reporting & archiving an organization's activities and resources. The information generated by this function helps individuals in the governance & management roles to make informed decisions.

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- ***In private organizations***, this information is not just important for internal use but also for outsiders: investors, bankers, creditors and employees have a keen interest in the financial health of the firm. Consequently, the accounting function is central to controlling the activities of private organizations.

4.2. Public Participation for Social Policies

- Public participation is the process by which public concerns, needs, and values are incorporated into governmental & corporate decision making. It is two-way communication & interaction, with the overall goal of better decisions that are supported by the public.

The core values of public participation are as follows:

- *The public should have a say in decisions about actions that affect their lives.*
- *Public participation includes the promise that the public's contribution will influence the decision.*
- *The public participation process communicates the interests and meets the process needs of all participants.*
- *The public participation process seeks out and facilitates the involvement of those potentially affected.*
- *The public participation process involves participants in defining how they participate.*
- *The public participation process provides participants with the information they need to participate in a meaningful way.*
- *The public participation process communicates to participants how their input affected the decision.*
- Public participation creates a new direct link between the public & the decision makers in the bureaucracy.
- ***From the perspective of the public***, public participation increases their influence on the decisions that affect their lives.
- ***From the perspective of government officials***, public participation provides a means by which contentious issues can be resolved. Public participation is a way of channeling these differences into genuine dialogue among people with different points of view.

Personal & Community Empowerment & Resilience

- ***Community empowerment*** refers to the process of enabling communities to increase control over their lives and participate in social affairs.
- ***'Empowerment'*** refers to the process by which people gain control over the factors and decisions that shape their lives. It is the process by which they increase their assets and

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attributes and build capacities to gain access, partners, networks or a voice, to gain control.

- **Community empowerment** implies community ownership & action that explicitly aims at social and political change. It is a process of re-negotiating power to gain more control. It recognizes that if some people are going to be empowered, then others will be sharing their existing power & giving some of it up.
- Participatory approaches in communication that encourage community empowerment through discussion & debate result in increased knowledge & awareness & a higher level of critical thinking. Critical thinking enables communities to understand the interplay of forces operating on their lives & helps them take their own decisions.

Participatory Budgeting

The participatory budget can be considered to be one of the most fully consistent participation tools in regard to the concept of governance.

- This process is open to any citizen, who wants to participate in it.
- It combines the forms of indirect & direct democracy, requires discussion & contributes to the redistribution of resources.
- It is a tool for educating, engaging & empowering citizens & strengthening demand for good governance. The enhanced transparency & accountability that participatory budgeting creates help reduce government patronage & corruption.

The key issues for PB:

1. *Discussion of the financial or budgetary dimension*
2. *Participation of those responsible for budgeting policy administration*
3. *Has to be a repeated process*
4. *Must include some form of public deliberation*
5. *Accountability on the output is required*

4.3. Collaborative Processes and Facilitation

Group Processes

- There are learnable, teachable skills & processes for meetings that get everyone sharing their wisdom. Wherever groups of people gather to create a vision, plan activities, or resolve their conflicts, they have different options on how to conduct their meetings. **No**

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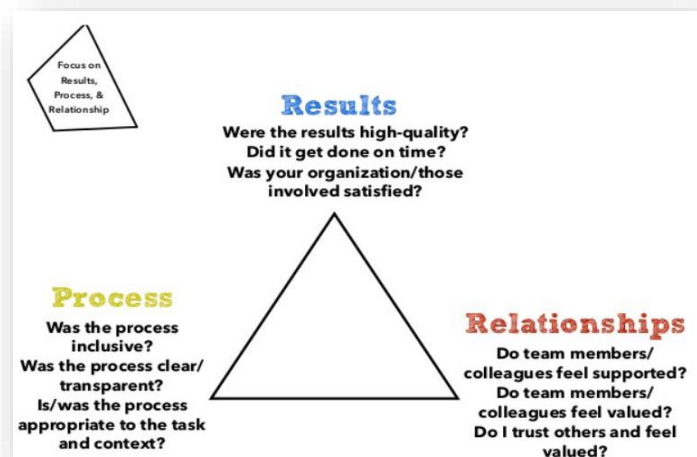


matter what the chosen option is, the group has much to gain by using a facilitator & knowing about facilitation skills.

- Most groups tend to focus their energy on reaching their goals quickly, ***not paying enough attention to what is going on beneath the surface***. Consequently, they often undermine the long-term success of the endeavor. A good facilitator helps solve these difficulties by balancing the focus across three dimensions: ***Results, Process & Relationship***.

- Facilitation is a system of tools, techniques & skills to help a group of people work well in;

1. Defining a common vision.
2. Making decisions.
3. Achieving their goals,
4. Creating a relational climate where trust prevails and communication is fluid, empathic & honest.



- It is also useful to work with conflicts, when they arise, in combination with other techniques, like mediation or different types of forums.
- ***Structure*** refers to stable recurring patterns in a group, like norms, roles or the status network. Some structural elements are visible, & are part of the public identity of the group (like a common vision, membership protocol, decision making procedures, formal roles, etc.), while others are invisible — the group is not aware of their existence (like certain norms and beliefs, role patterns, the status network, recurring power abuses, etc.).
- ***In contrast*** to process & structure, ***content*** refers to what a group is working on, what is being said, the matter under discussion.



Whenever a group meets, it is possible to observe both content & process.

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- A facilitator is a person who essentially sets all the right coordinates for a meeting to take place & produce results. **Most often**, a facilitator has the following responsibilities in a workshop:

1. **Design and plan:** Once you know the objectives, it is time to design the right group process & select the proper facilitation techniques that will help achieve the outcomes.

2. **Run the process and facilitate the meeting:** When the session starts, it is time to guide the group through the designed process, encourage participation and help the group achieve its goals. Here are some of the most important elements of what a facilitator specifically does during a session:



Set the context & ground rules

**Encourage participation*

**Facilitate discussions*

**Hold the time and space:*

**Keep an eye on the efficiency of the group work & adjust the process if necessary.*

**Record results*

Facilitation Skills

- Developing the skills to be a good facilitator is a process that improves with practice, practice, and practice. It is important to know the skills necessary to facilitate a group and to take steps to improve and reinforce those skills.

Facilitation skills for preparing a meeting:

**Asking the right questions*

** Process design*

**Agenda planning*

**Communication with stakeholders*

** Organizing & project management*

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Facilitation skills for facilitating the meeting:

- | | | |
|------------------------|----------------------------------|--------------------|
| *Inclusive environment | *Clear guidelines & instructions | * Group management |
| *Empathy | *Active Listening | * Verbal skills |
| *Conflict management | *Consensus-building | * Manage timing |
| *Gauge the energy | *Flexibility | * Staying neutral |
| *Recording outcomes | | |

Resources for Facilitation

- *Facilitation tools for meetings and workshops*
- *Facilitating meetings.*
- *Free Resources for facilitation.*
- *Community Facilitation for Nonviolent Eco social Transitions*

4.4. Social Technologies for Collaborative Processes

- Social technologies are the dynamics that are proposed to the group to be used for different purposes: inquiry about a topic, co-design of plans or actions, decision-making, reinforcement of group cohesion, conflict resolution.
- When designing a work meeting or workshop, those dynamics will be selected to help achieve the desired goals. **However**, to start with there are many guides that can help us. So, when a workshop is going to be designed, we can go to the guides and select those that we consider to be the most appropriate.

5.1. Eco-social Innovation

- Social Enterprises have been promoted by governments alongside public sector reforms that are resulting in the creation of new quasi-markets for public provision & the greater involvement of private and civil society sector organisations.

Typology of public service innovations found in 30 Social Enterprises:

- *Organizational (Democratic governance and decision making)*
- *Improvements to existing services/systems (cost cutting & better delivery)*
- *New services and treatments (Financial innovation)*
- *Outreach/marketing (New ways of promoting available services within communities)*

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5.2. Starting a Co-production Process

How Co-Production Works

Co-production is:

- *Recognizing people as assets (people themselves are the real wealth of society).*
- *Promoting reciprocity, giving and receiving*
- *Building social networks (people's physical and mental well-being depends on strong, enduring relationships).*

To implement co-production, we need a 'whole systems approach' because:

1. Organizations must change at every level
2. Participation should become part of daily practice
3. Participation operates at different levels

➔ Co-production is based on the concept of the **'relational state'**. Public services & governments need to be based on a relationship approach, with the devolution of power at all levels, so that people have power as well as responsibility. Governments & service providers need to trust citizens who use services.

The 4 Phases

- *Preparation of the Process (explore the challenge & possible solutions)*
- *Co-defining the local challenge (define the challenge themes)*
- *Co-creating solutions (address the challenge)*
- *Implementing the solutions locally (create a solution idea)*

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Fundamental issues to take into account

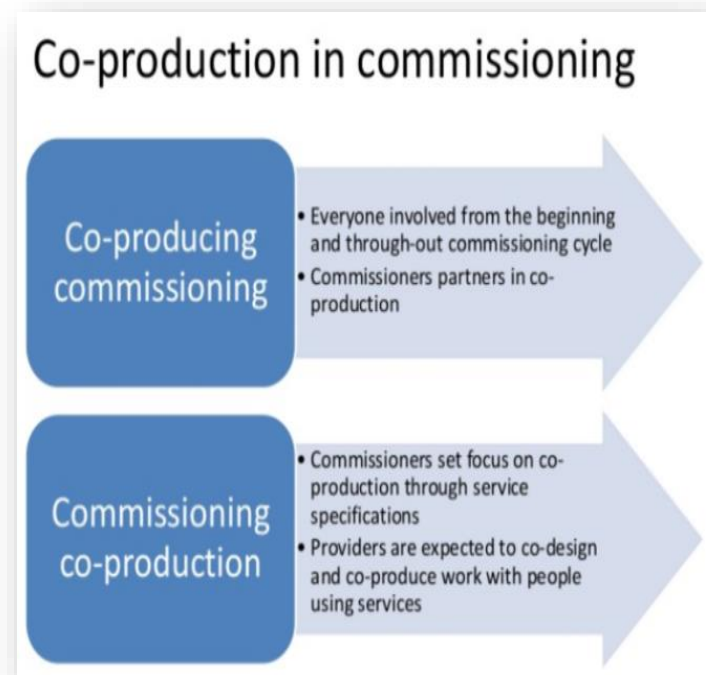
- 1) Access
- 2) Independent support
- 3) Building community capacity
- 4) Frontline staff & practitioners
- 5) Training & support
- 6) Commissioning co-productive services

Review

- According to classical definitions, a currency is a medium of exchange with a unique denomination, that relates to a unique standard of value, but which might take several forms as a means of payment (notes, coins, etc.).

Classic money has three functions:

- Medium of exchange, unit of account & store of value.
- Social currencies, in contrast, only fulfill the two first options. Unlike conventional money, they are created through real activity of already realized work.
- The current monetary system has a tendency to instability, as bank money tends to be *too abundant in times of booms and too scarce in times of crisis*.
- Often devised in response to the shortcomings of the monetary system – for example, the lack of credit available for small businesses, or funding cuts to public services
- ***The following four areas broadly cover the social, economic & environmental objectives that inform the range of community currency projects operating across the world today:***
 1. Democratizing services & organisations
 2. Supporting the SME economy
 3. Countering inequality & social exclusion
 4. Addressing environmental impacts



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- Currency initiatives are **practical responses** to a range of policy areas that don't aim to replace public services, but rather to transform them into being more useful & better value for money. Though requiring significant investment for lasting success, in terms of economic viability and input from practitioners & end-users, community currencies can offer the long-term reward of a cost-effective tool.
- Community currencies allow local authorities, professional organisations or businesses to explicitly value & incentivize, the contribution of the general public to their services. If well implemented;
 1. Can bring new ideas into public service delivery (in a cost-effective way).
 2. Strengthen independent community-based initiatives.
 3. Recognize talents not valued by the market economy.



It is important to clarify that community currencies **cannot single-handedly** overcome the deep social, economic and political inequalities that exist within societies. These are structural issues requiring structural change. **Nonetheless**, well-designed currencies offer a unique tool for addressing some of the effects of social exclusion.

5.3. What Complementary Currencies Look Like?

Community and complementary currencies

- Complementary currencies are designed to sit alongside mainstream money to address objectives that the conventional money system can't, they are a subset of complementary currencies that are tied to a specific, demarcated & limited community. As such, a community currency is designed to meet the needs of this defined community, on a not-for-profit basis.

Time-based currencies

'One hour's work equals a unit of time'

- The community currencies are widely used to recognize the value of activities neglected by the economy are timebanks. Exchanges between members are mediated by a broker, who matches the requests of one member with the skills offered by others. This offers an incentive for people to help other members of their community and can give economically excluded individuals the opportunity to 'buy' services they would otherwise be unable to afford and to feel that their own skills are valued & needed by others.

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LETS (Local Exchange Trading Systems)

- LETS today are mutual-credit systems for individuals, rather than businesses. Members of a LETS advertise their skills and services & exchange these with other members in return for credits.
- LETS are intended to mobilize the latent capacity of a community by providing both a forum & medium of exchange outside the conventional market economy.
- The networks are co-operatively managed & self-regulating and are commonly associated with the ideals of empowerment, localization & community building.

Co-Producing A Currency

- Needs, assets & objectives are unique to each individual & community, there is no definitive co-production blueprint. **Rather**, certain guiding principles should be considered.

For example, within a currency project, Co-production should involve:

1. *Developing people's existing capabilities*
2. *Mutuality and reciprocity (Offer stakeholders a range of incentives)*
3. *Peer support networks (Engaging peer & personal networks alongside currency experts).*
4. *Blurring distinctions (Reduce barriers between professionals & recipients)*
5. *Facilitating rather than delivering (View the currency as a catalyst & facilitator of change).*
6. *Recognizing people as assets (See people as equal partners in the design and delivery of the currency).*

5.4. Municipalities in Transition (MiT)

- (MiT) was developed in 2017, it provides a local Community a way to reorganize itself towards sustainability & wellbeing, responding to the great challenges of this historical period, adopting systemic thinking & a specific set of methodologies, tools and principles.

The MIT System

The MiT System is designed to foster the process of transformative collaborations within the Community. An ideal implementation would be able to benefit from its use directly or indirectly.

Three main starting point scenarios are possible:

- *Process generated and led by the local government*

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- *Process generated and led by one or more Actors in civil society*
- *Process generated and led by both together*

MiTS is perform functions that are extremely important for every community:

1. ***The Evaluation and Diagnosis*** evaluate the system in an approximate way, but still sensible enough for the present purpose, and to set a reference Baseline
2. ***The Co-Design Function*** connect different actors & help them co-design plans and actions.
3. ***The Co-Implementation Function***
4. ***The Toolbox Function*** store readily available Pattern Language Database from around the world.
5. ***Cultural Leverage Function*** help people gravitate towards systemic thinking & sustainability.
6. ***The Governance Innovation Function*** equipped with a special model of Governance, a very smart combination of classic Sociocracy, Agile & Lean.

The Training of Tutors

- The MiTS wants to bring the activities of the community into a different space where real transformation is possible. **However**, following the MiTS process could result in a very difficult task without the help of a tutor, leading practitioners to fall back into the old patterns and models.
- Tutors are tasked with supporting the implementation of the MiTS & help the community identify possible fallbacks in their governance system & activities. The tutor can also act as a networker & catalyst, connecting with neighboring municipalities & bringing this way of working to them.
- Through the use of the MiTS, **pioneer-communities** are able to identify which of the ongoing projects must be continued or invested in for greater impact & which critical areas lack action.

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