

Advancing sustainability transformations through building capacity in social economy organizations

Capacity building per la sostenibilità nelle organizzazioni dell'economia sociale

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Abstract

In the last years, scholars and practitioners have carried out a reflection about the social, economic, and political role of social economy organizations in advancing sustainability transformations. Social economy organizations need a cultural journey of self-perception and awareness raising regarding their identity as change agents for sustainability to become even more a vehicle for social transformation. In other words, sustainability competences, mobilized by social economy organizations, need to be made explicit, strengthened and brought to the awareness of the organizations, through lifelong learning. In response to this problem, the paper discusses, through an ethnographic study, the case of Proforma, a social enterprise in the Mugello Area (Tuscany, Italy). The practices, values, the mindset and associated competences that characterize the enterprise's work in promoting sustainability initiatives, locally, are outlined. Tensions between embodying sustainability values and performing sustainability initiatives are highlighted.

Keywords: sustainability; transformation; social economy; change agent; scaling.

Sintesi

Negli ultimi anni è stata portata avanti una ri-lettura del ruolo sociale, economico e politico rappresentato dalle organizzazioni dell'economia sociale in quanto attori costruttivi di una società sostenibile. Le organizzazioni dell'economia sociale hanno bisogno di un percorso culturale di auto-percezione e presa di consapevolezza della propria identità come agente di cambiamento per la sostenibilità e veicolo di trasformazione sociale. In altre parole, le competenze in materia di sostenibilità, agite dall'Economia Sociale, hanno bisogno di essere esplicitate, rafforzate e portate a consapevolezza delle organizzazioni, attraverso adeguate azioni di formazione continua. In risposta a questo problema, il presente articolo discute, attraverso uno studio etnografico, il caso di Proforma, un'impresa sociale del Mugello, delineando le pratiche, ma anche i valori, la mentalità e le associate competenze che caratterizzano il lavoro dell'impresa nel sostenere iniziative di sostenibilità a livello locale. La sfida di incarnare valori di sostenibilità e agire per la sostenibilità è evidenziata.

Parole chiave: sostenibilità; trasformazione; economia sociale; agente di cambiamento; scaling.

¹ Si ringraziano Rudy Moscato, Paolo Sonni e Barbara Dreoni dell'impresa sociale Proforma per la partecipazione a questo studio.

1. Introduction

Scholars and practitioners have been highlighting the need to move beyond the technological fix approach to sustainability transformations, integrating the idea that mindsets, paradigms, values and worldviews constitute a deep leverage point for transforming ourselves, our systems and societies (Wamsler, Osberg, Osika, Herndersson, & Mundaca, 2021). Consequently, importance has been placed on the potential for quality human agency to consciously co-create sustainability transformations (O'Brien, 2021). At the same time, decades of efforts to promote technical, behavioral, and political solutions failing to successfully respond to the scale, magnitude, and scope of sustainability challenges has left many people with a growing sense of despondency and a diminished sense of agency (O'Brien et al., 2023). Therefore, a shift is needed to build and activate the agency and capacities of individuals and collectives to transform systems and cultures at scale (O'Brien, 2021).

Increasingly, scholars have identified and examined the development of so-called sustainability competences (Brundiens et al., 2021; De Haan, 2010; Kwauk & Casey, 2021; Roorda, 2019; Wiek, Withycombe, & Redman, 2011). However, the majority of attention has been reserved to formal education settings and more specifically higher education (Mugnaini, 2022). Consequently, there is a lack of attention to the development of such competences within professional and working environments (Wamsler, Osberg, Osika, Herndersson, & Mundaca, 2021) despite the fact that these are contexts of individual agency with great potential for collective and systems change (O'Brien, 2018).

At the same time, future research agendas underline the need towards building innovative capacities, that is, human abilities and political responsibilities that can better enable new forms of transition (Augenstein et al., 2020) as well to explore different roles that actors can play, which values drive them, and how they build alliances to foster transformative change (Lam et al., 2020). There is a shift away from the modern definition of competencies or skills whose development is functional to the enhancement of a person's efficiency and values towards the activation of capacities and dispositions. Capacities that can enable individuals to dig deeper and relate wider, stimulate accountability and responsibility, overserve with skepticism one's own personal narratives, desires and identifications and to sense, relate and imagine otherwise as we face the end of the world as we know it (Machado de Oliveira, 2021).

Prior research has outlined the role of social economy organizations in contributing to the fulfillment of the Sustainable Development Goals of the UN Agenda 2030 (UNTFSSSE, 2022). Social Economy is formed of cooperatives, mutual societies, foundations, associations, paritarian institutions, and social enterprises that act in several economic sectors (healthcare, education, tourism, renewable energy, agrifood, cooperative housing, culture, sport and leisure, etc.). By putting people over profit and reinvesting surplus into economic and social objectives they contribute to sustainable development. Nonetheless, social economy organizations themselves declare that they need capacity building to adopt more sustainable practices (Del Gobbo, Falconi, Mugnaini, & De Maria, 2023).

This yet exploratory study seeks to contribute to an actual direction of research, namely, the scaling of innovations for systemic changes in the field of social entrepreneurship based on the principles of sustainable development. To do so, a literature-based framework on sustainability competences (Mugnaini, 2023) is applied to the case of Proforma, a social enterprise organizing and supporting sustainability initiatives at the local scale. By discussing the application of this framework to a real-world context, the study seeks to disclose tensions between embodying sustainability values and carrying out sustainability

initiatives. Through an ethnographic study, the paper outlines initiatives, but also the values, mindset and associated competences that characterize the social enterprise sustainability culture and practice. Thus, it provides an analysis of the extent to which sustainability competences are already applied in a particularly sustainability-oriented organization.

For this reason, the study is driven by the following questions:

- How do existing sustainability-oriented organizations approach their work by applying sustainability competences? What tensions can be observed regarding their application?
- The results can serve as foundations for organizations approaching sustainability and pave the way towards developing educational pathways aiming at helping similar organizations to unfold their identity as change agents for sustainability.

2. Methodological approach

2.1. The case of Proforma

Proforma is a social enterprise, situated in central Italy, that offers professional training, guidance and consultancy to answer the educational needs of the local area and its economic fabric. The educational offer is shaped as a life experience which favors active participation and listening, open discussions and complicity and aims at developing not only professional competences but also self-awareness, self-worth and fruitful relationships. Through their mission, they promote social cohesion, networking of people and resources to develop the local community, the reduction of social inequalities and exclusion and caring for humans and more than humans. Additionally, they take part in several working groups aiming at co-creating local development policies.

The educational programmes offered are shaped on the training needs of the territory of Mugello which is characterized by a considerable geographical fragmentation with numerous internal areas subject to depopulation and an economic structure that still presents a significant presence of agriculture and livestock breeding (with a large percentage of organic production); a manufacturing sector that is prevalently artisan; an excellent tourism sector that sees the growth of agritourism and green hospitality; a significant presence of social services offered by cooperatives and associations.

2.2. Data collection & analysis

The empirical material for this study has been collected through an ethnographic approach (Cardano, 1997; Piasere, 2002) featuring participant observation at the social enterprise and its events, interviews, and group interviews.

More specifically, the ethnographic study kick-off started in March 2022, and it is still ongoing as it is part of a larger PhD research. The study is structured in two phases:

1. desk analysis;
2. field work.

The desk analysis was conducted in spring 2022 and consists of a critical review of articles identified from a variety of sources (Eric, Scopus and Education Source databases,

institutional websites, and a backward reference search). The study made it possible to identify the most influential competence frameworks in relation to sustainability, thus representing a starting point for defining which competences are needed to foster sustainability transformations (Mugnaini, 2022). The thematic areas have been traced back, to provide a reference, to the competence areas of the two European competence frameworks, the GreenComp for areas one to four and the LifeComp for domains five to six (Figure 1) (Mugnaini, 2023).

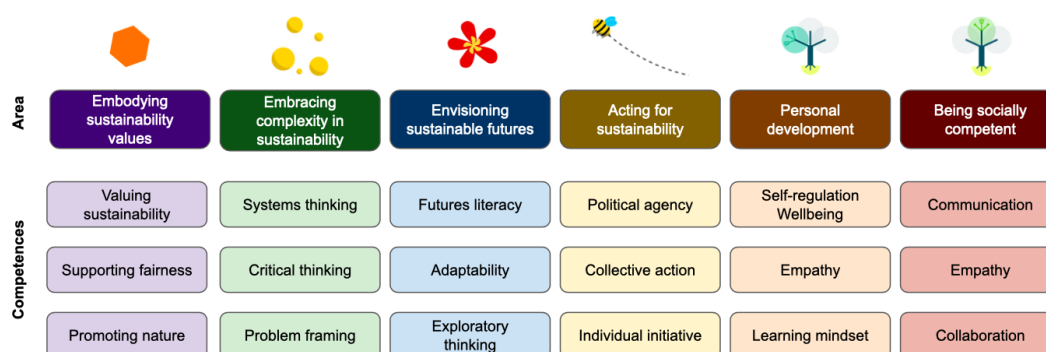


Figure 1. Sustainability competences framework (Mugnaini, 2023).

The field work is summarized in Figure 2.

Time	Activity	Stakeholders	Method	Aims	Results
March 2022	First exploration and assessment of project feasibility	Proforma's President, Phd tutor, researcher	Unstructured interview	Explore opportunitie, assess constraints, envision collaboration of my engagement in the work of the social enterprise	It was established a blended form of collaboration including in person and online meetings
July-September 2022	Writing an EU funding proposal for a project related to environmental education and food education	Researcher, Proforma's practitioner, external consultant	Brainstorming	Identification of sustainability initiatives carried out by the social enterprise	Proforma has situated knowledge and long-term partnerships with local businesses focusing on biological agriculture, circular economy and corporate social responsibility in the agribusiness, local production and consumption, environmental education and inclusion of people with disabilities

February 2023	Seminar within the Laboratory of Educational Research for Social Innovation and Cooperation	Research unit of the University of Florence, University Spin-Off (Moca Future Designers), network of social cooperatives (Pegaso) and Proforma	Unstructured group interview	Discuss knowledge transfer to foster innovation and impact on the territory	A two-year program to work on civic economy, generating social impact in the territory and communities of Mugello
	Gathering the point of view of the social enterprise on the topic of civic economy	Researcher, Proforma's ex president, external partner	Unstructured group interview	Investigate the perspective of the social enterprise in terms of possibilities and constraints to establish a civic economy district in the Mugello area	Possibilities: several economic activities in the area already work with a civic economy mindset. Constraints: it is hard to create a network of institutions and organizations willing to commit to the aim
March 2023	Organization of the Festival of Inclusion	Researcher, Proforma's practitioner, external consultant	Unstructured group interview	Identification of further sustainability initiatives carried out by the social enterprise	Initiatives concerning heterodox economy, inclusive pedagogy, cultural and biological diversity, substance abuse prevention, emotional health, inclusive sport, and LGBTQAI+ awareness
	Filling in NeXt Index® questionnaire	Researcher, Proforma's practitioner and ex-president	Structured interview on the basis of the NeXt Index®	Bring out Proforma's social, environmental and economic sensitivity based on sustainable development indicators	Identification of processes related to governance, human resources, nature-positive behavior, work environment, relationships with the community
May 2023	Festival of Inclusion	Researcher, Proforma's team, community	Participant observation with narrative technique (diary)	Understanding how Proforma drives sustainability initiatives	Identification of ways of working, partnerships, values and attitudes towards sustainability

June-July-August 2023	Organisation of a contribution within the National Civil Economy Festival	Researcher, Proforma's president, external partners, municipality, citizen	Two semi-structured interviews (Proforma and municipality), based on an interview guideline, in form of a list of open questions, one unstructured phone interview (external partner), one unstructured group interview (external partners).	Identify the area's distinctive characteristics, opportunities and needs, the work already in place and established partnership, what solution the civic economy district can provide to the area	In the area there are already several economic activities sustainably oriented but they are not aware of practicing sustainability and they are not connected among themselves
September 2023	National Civil Economy Festival	Researcher, Proforma's president	Participant observation with narrative technique (diary)	Understanding Proforma's sustainability initiatives in the context of similar projects	Proforma challenges dominant capitalistic worldviews and wish to ally with organizations with a similar vision
October 2023	Second exploration of the project and assessment of previous steps	Research unit, Proforma's president and ex-president	Unstructured group interview	Internal reflection on the cooperative's professional identity as a change agent for sustainability	The Proforma model means working with people in a way that echoes the principles of civil economy and sustainability

Figure 2. Field work.

The field work consists, by the time of writing, in 21 meetings, in the context of which, as researcher I supported the social enterprise in their work with sustainability-related projects and events, including attending them. This facilitated access to the social enterprise's everyday practices. Through participant observation (Boncori, 1994; Semi, 2010), field notes were collected, setting out to gather an understanding of the culture (Trincherro, 2004) of the social enterprise and how sustainability initiatives are sustained in practice.

The field work was also an occasion to carry out different forms of interviews (Coggi & Ricchiardi, 2005) with key people within the enterprise and other stakeholders closely collaborating with them. Some of these interviews were carried out in person, others on Google Meet and others on the phone. Longer conversations (three) were audio recorded and later transcribed.

Additional data from the website (<https://proformacoop.it>) and social media of the social enterprise, Facebook (<https://www.facebook.com/agenziaformativa>)

[proforma](https://www.proforma.it)), and Instagram (https://www.instagram.com/proforma_agenzia_formativa), as well as from public documents, Bilanci Sociali 2021 e 2022 (<https://proformacoop.it/bilancio-sociale/>) and documents privately shared were collected.

Data were analyzed through a deductive content analysis (Bryman, 2012) based on predetermined categories matching the sustainability competences' areas underlined in Mugnaini (2023) and using the Qualitative Content Analysis software QCAmap.

Once the categories of analysis had been identified and established, a process of interpreting them was carried out, which led to the definition of three interpretive keys useful for a critical reinterpretation of the Proforma's working model centered on the embodiment of sustainability values and the mobilization of sustainability competences which drive actions to shape a sustainable community (Figure 3).

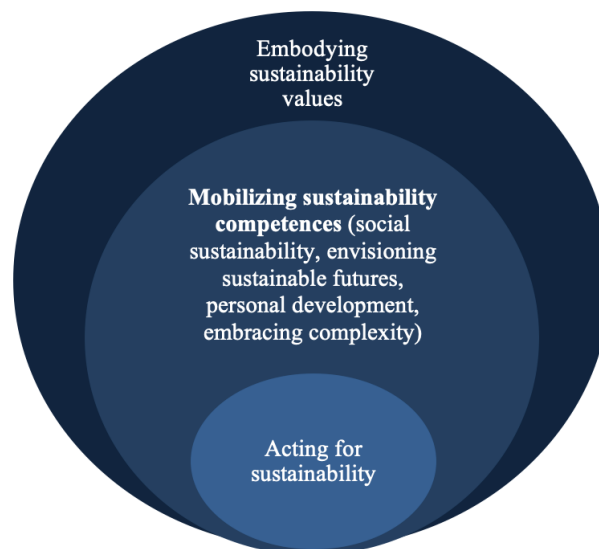


Figure 3. Sustainability competences are linked to sustainability values to drive sustainable actions.

Valuing sustainability is a meta-competence highlighting that values are constructs and people can choose which values to prioritize in their lives to direct their way of thinking, planning and taking actions.

2.3. Positionality in science-practice collaboration

My involvement with the social enterprise unfolded building relationships with three main stakeholders: the President of the social enterprise, the former president (now retired but still active in Proforma), and a practitioner covering several responsibility and management roles. Working by their side in carrying out practical tasks has been valuable for data collection. The interaction has not been neutral as the author and the key stakeholders have engaged in several discussions about specific sustainability initiatives and their impact, thus transforming our mutual knowledge, competences and attitudes towards the topic. These discussions have guided later observations and the reflective process behind.

Furthermore, the researcher does not live in the local area where the social enterprise is located (Mugello). Consequently, the researcher does not share the same cultural background and socio-economic understanding of the area. Due to this limitation, part of

the fieldwork was carried out with the support of a fellow PhD student from the Mugello area to facilitate the understanding of the socio-cultural and economic dynamics discussed.

Finally, the timescapes coordinating the interactions between the researcher and the key stakeholders required attention. The academic temporal frames in which as researcher I am situated misrepresent the starting point and end point of this science-practice collaboration within three years. However, by applying the capacity of temporal imagination (Facer, 2023) one can place attention to the different temporal frames, rhythms, and processes at play in this situation (ibidem). First of all, the social enterprise Proforma was established over 20 years ago and has been shaping its own professional identity as a change agent for sustainability since the beginning. Therefore, the joint science-practice collaboration between the author and the social enterprise represents only a piece of the puzzle, leaving out a big part of the story. Secondly, the social enterprise has been in a formal partnership with the University of Florence since far before financing part of this PhD. As the PhD scholarship is funded also by the Ministry of University and Research, there was an imposition to frame the one-year science-practice collaboration within the first two years of the PhD without any regard to the rhythms of the research and of the social enterprise processes. Additionally, the collaboration overlapped with a period abroad of six months, inducing part of the collaboration to be held through online meetings.

Third, the social enterprise and academic life move at different rhythms, creating moments in which the collaboration comes out of synchronization. Taking as an endpoint the conclusion of the PhD, it is key to reflect how the future of the social enterprise will be thought together.

3. Results. Framework application

The results draw attention to the application of the sustainability competence framework to the case of Proforma, highlighting strengths and weaknesses in the mobilization of sustainability competences in their working model.

3.1. Embodying sustainability values

Through their annual social report, the social enterprise shows valuing sustainability. “The reference value system starts from cooperative values: democracy and participation, internal and external mutuality, non-speculative nature, solidarity and the will to serve the territory, having as reference points the quality of relations, social, environmental, and economic sustainability” (Proforma, 2021, pp. 4-5). By way of example, on the website it is stated that Proforma is an educational agency oriented towards sustainable development and that: “People are at the center of our projects” (<https://proformacoop.it>). Among the values highlighted there are: “social cohesion and community bonds as factors of inclusion, integration, and security” (<https://proformacoop.it/chi-siamo/>), “the promotion of fair opportunities (Statuto, p. 4), social justice, economic equality and solidarity and that today cannot also be about environmental sustainability (Proforma, 2021, p. 1). These values are embedded in their work – as shown later – but are also taken into consideration when supporting other organizations, e.g. Toscana Pride responding to the needs of LGBTIQA people (<https://proformacoop.it/proforma-sostiene-il-toscana-pride-dell8-luglio-2023-a-firenze/>), Indaco Teatro con L’altro APS holding theater labs with people with disabilities (<https://proformacoop.it/oh-che-bel-castello-spettacolo-teatrale-a-cura-dell-ass-ne-indaco-teatro-con-laltro/>), Progetto Arcobaleno helping people fighting addiction issues

(<https://proformacoop.it/laboratorio-sul-contrasto-al-gioco-dazzardo-e-giochi-da-tavolo-con-mugello-boardgame/>). Special consideration to gender equality and human rights can be seen in the actions of the social enterprise. For instance, “regarding members and employees, Proforma has always valued not only its female component, but also the female component of each. It has also always, in respect of both women and men, adopted forms of work-life balance based on flexible working hours and autonomy in the management of working time” (Proforma, 2021, p. 23). Moreover, in the Bilancio Sociale (Proforma, 2021) modesty is highlighted as a value related “to doing well as a categorical imperative, a necessary performance, a sign of respect for people” (p. 2). This is because the social enterprise believes that “diversity, be it disadvantage or fragility, has always represented a unique opportunity to rethink our social and economic model that is no longer sustainable. It represents the only value that can open a breakthrough into a now uncertain future” (Proforma, 2023a, p. 2)².

Attention to environmental issues is also a core value of the social enterprise (Proforma, 2021, p. 22). In a private document (Proforma, 2023a, p. 2) it is stated “We do not believe in privatization processes [...] in the management, organization and provision especially of those fundamental goods and fundamental services that make living dignified: air, water, land, health education, work, housing”. This translates in the same document into “Empowerment of each individual on the choices he or she makes in terms of environmental impact” (Proforma, 2023a, p. 2).

3.2. Mobilizing sustainability competences

The social enterprise has shown evidence of mobilizing the competence of *envisioning sustainable futures*. In a document shared with the local municipality they present a vision for the Mugello area which speaks of “a generative community built on organic farming, inclusion and wellbeing for humans and more than humans” (Proforma, 2023a, p. 1). This vision is practically unfolding through the project of establishing a Civil Economy District, hence a permanent site for the proliferation of ethical economic experiments carried out by a number of different actors who constitute themselves, on the basis of shared values, as a Generative Community from the point of view of the well-being of the environment and the people who live it (Proforma, 2022, p. 21).

Moreover, Proforma has over the years invested in building and engaging a wider social network across sectors (university, industry, governance bodies) for focused collaboration (such as funding this PhD), resource-pooling, extending the organization’s influence, working with them collaboratively to carry out sustainability initiatives. *Being socially competent* in the case of Proforma means being member of the *Laboratory of Educational Research for Social Innovation and Cooperation* of the University of Florence (<https://www.forlilpsi.unifi.it/vp-530-laboratorio>), and of several consultation tables at the local level discussing disability, youths’ policies, local development policies, as well of *Galstart* (territorial development agency) and of *Agribusiness Mugello* (a place of co-design and active collaboration of all actors in the Mugello area) (Interview March 2023). Specifically, the social enterprise is seeking to build a network of collaborators around the Civil Economy District to generate coherence through targeted interventions and

² The document consists of a word file in which the former president of Proforma highlights a vision for the Mugello area. The document is not published on the website or anywhere else but it has been shared with the municipality and the researcher.

stewarding the development of particularly critical ingredients of a complex change system (Interview February 2023).

Nonetheless, in terms of *personal development*, Proforma has carried out a supervision meeting (Proforma, 2023b)³ with the whole staff where they reflected on criticalities regarding their way of working and possible solutions. For instance, some employees have highlighted feeling “stressed due to work overload and iperresponsabilization” together with “guilt to overload others”. At the same time, multiple subjects underline that “tasks are not clearly defined and distributed”. “The working rhythm is always set to emergency mode” leading to “not being able to sit together for lunch even once a week”. Others feel like they are “bringing work at home” both practically and mentally, including during “work holidays”. The president of the enterprise underlines “feeling alone or misunderstood at work” while an employee has highlighted that they do not “feel they are contributing to the development of the social enterprise and that their work is not recognized”. The president of the social enterprise also highlights “discomfort on the old model of Proforma and on the resistance to change of Proforma and the territory” specifically in relation to the “family [organizational] model”. To overcome these issues the following measures were proposed: having weekly organizational meetings, implementing meetings focused on emotional rather than practical aspects of the work, working from home, finding new strategies to distribute tasks, increasing the number of employees to distribute the workload, establishing a monthly meeting to encourage personal contributions in a logic of wider participation and debate. Finally, the president of the social enterprise suggests embracing some tools that belong predominantly to for profit businesses such as a “clean communication strategy” along with “more reflective moments to plan the organization”. Additionally, “expanding the social network” was also seen as necessary. They expresses the need to “be part of projects and an organization that grow”, adding “who says that social enterprises need to be small and poor?”.

Similarly, weaknesses can be seen in mobilizing the competence of *embracing complexity in sustainability*. While this competence is acted upon in different projects that connect economic, social and environmental sustainability, e.g. Catering Sociale (<https://www.facebook.com/profile.php?id=100040080350278>), ethnographic notes show that the enterprise has been failing to articulate and communicate the complexity and the interlinkages between environmental, economic and social aspects of their work and how only tackling these three dimensions together one can contribute to sustainable development in their community.

3.3. Acting for sustainability

The following sustainability initiatives represent examples of how the social enterprise mobilizes the competence *acting for sustainability* in practice, thus, contributing to sustainability transformations at the local scale. Simultaneously, the capacity of the social enterprise to connect values with action emerges.

Proforma juggles different activities, first and foremost, the provision of educational and professional training. The educational offer concerns:

³ The document consists of a word file in which notes have been taken to summarize the staff concerns related to the working environment. The document is not published on the website or anywhere else, but it has been shared with the researcher.

- out-of-school training aimed at preventing early school leaving and educational and training success, preventing bullying and combating educational poverty;
- professional training in the environmental, agricultural and livestock sectors, artisan and mechanical area, care-related jobs, tourism and the enhancement of local artistic heritage (Proforma, 2021).

The social enterprise also provides consulting services to educational projects of which an example is “In Cibo Civitas”, a national initiative promoting more conscious behaviors and active citizen participation to foster a sustainable food system.

Proforma also promotes cultural activities of social interest with an educational purpose such as the *Festival Inclusione nella Diversità* (<https://proformacoop.it/festival-inclusione-nella-diversita/>), a series of meetings, debates, workshops, art and food enhancing sustainable development at the local level. The initiatives have been organized around the following topics: heterodox economy, inclusive pedagogy, cultural and biological diversity, contrast to substance abuse, emotional health, inclusive sport, LGBTQAI+ sensibilization.

The social enterprise is also responsible for agricultural activities and related services aimed at the employment of individuals who are disadvantaged workers. In this sense it can be highlighted the service of *Catering Inclusivo* equipping youths with cognitive disabilities with gardening and cooking skills and consequently employing them.

Lastly, the social enterprise promotes activities to support the sustainable development of the territory such as the project *Orme del Mugello* on slow tourism and the valorization of local sustainable businesses, and the project of Civil Economy aiming at creating a network of stakeholders who have interest, sensitivity, and willingness to establish a Civil Economy District in the Mugello area. The two projects are interlinked in the sense that there is the aim to identify among the organizations that operate along the trails those that work in a spirit of civil economy (sustainable companies, companies that do inclusion projects, farms with organic production, etc.).

These activities contribute to ensuring inclusive and equitable quality education and promote lifelong learning opportunities for all (SDG 4), reducing inequalities based on disability, race, ethnicity, origin, religion or economic or other status (SDG 10) and allowing people to access decent work (SDG 8). Moreover, specific courses and educational activities directly promote responsible consumption and production (SDG 12), e.g. the project *Radilcamenteambiente* (<https://proformacoop.it/area-agricola-ambientale/>), as well as biodiversity preservation (SDG 14).

4. Discussion and limitations

Overall, the application of the sustainability competence framework (Mugnaini, 2023) to the case of Proforma shows that the social enterprise serves as an example of an organization embodying sustainability values and mobilizing sustainability competences in carrying out sustainability initiatives that contribute to wider transformative change at the local level.

The framework application confirms that sustainability competences can (at least partly) be mobilized by organizations, as shown by the contributions to envisioning a sustainable future for the Mugello area, building and engaging a wider social network and supporting the educational development of marginalized people. However, although Proforma clearly

incorporates sustainability principles, the organization also shows limitations or even contradictions in mobilizing sustainability competences. In fact, the working atmosphere of the organization, and the ability to connect and communicate different dimensions of sustainability, need further development. This is in line, on one hand, with the findings of Osservatorio Italiano Imprese e Diritti Umani (2024) in terms of work-life balance, work-time management and flexibility, highlighting that workers today are first and foremost demanding better scheduling of the work to be done and greater flexibility (84%), aspects that again in the eyes of workers, are the most difficult to obtain from employers (79%). The outcomes and impacts of sustainability initiatives will always be limited as long as there is a disconnection between the embodiment of sustainability values, as an organization, and the mobilization of personal development competences by those performing the work who are feeling frustrated, alone, or unrecognized.

On the other hand, it is in line with what expressed by the Forum del Terzo Settore (2023) which underlines that although the Third Sector represents a vehicle for social transformation, it struggles to recognize itself as a key player in a process of change, signaling a need for a cultural journey of self-perception and awareness raising.

It is important to note that, in the article, the framework is applied to a specific case of a social enterprise located in Italy. From an empirical perspective, the research is clearly limited by the choice of analyzing only one organization. Further research is needed to see how the framework applies to a larger sample, including social economy organizations acting in a variety of sectors, to provide more robust findings.

This paper sought also to contribute to the scaling transformations to sustainability discourse by discussing the scaling of the Proforma model, making it applicable beyond the case at hand, by developing educational pathways aiming at helping similar organizations to unfold their identity as change agents for sustainability.

The president of the social enterprise has clearly stated their intention of *scaling out*, envisioning the organization to grow together with the projects it supports and their economic value. A previous study from Moore, Riddell, and Vocisano (2015) has underlined that leaders who work in non-profit organizations are increasingly concerned with scaling the positive impact of their social innovations in order to meet the scope of contemporary social and environmental challenges. As in the case study of Moore, Riddell, and Vocisano (2015) conflicts arise between the old and the innovative, where a resistance to change and lack of support and complicity among peers and colleagues is perceived. From framing themselves as “modest” the former president of the social enterprise suggests that growth and broader diffusion is not considered a desired goal. There is a dilemma unfolding between the desire to remain local, small and distinct from the mainstream to the willingness to grow and impact a larger number of people.

In terms of scaling strategies, Proforma is currently balancing between a *scaling up* approach (advocating with the local municipality support for organic agriculture and heterodox economic practices) and a *scaling deep* approach (seeking to build a learning community with initiatives such as that of the Festival Inclusionione nella Diversità or the Civil Economy project). This community of practice could represent a tool to transform people’s hearts, minds, values, and cultural and economic practices as well as the quality of relationships they have. However, it needs to be further investigated if a reflection has been carried out in relation to *broadening the framing of the problem*. At the moment, the social enterprise tries to address issues such as early school leaving by supplying alternative educational pathways, but it is not clear if a broader strategy to reveal its systemic or root causes has been part of their mission as well. Previous research already highlighted that

values-based approaches require specific skillsets and are difficult to implement and scale (Hampton, Blundel, Wahga, Fawcett, & Shaw, 2022).

While additional data and validation are needed, this paper complement previous studies underlying the ways in which values (personal, professional, and organizational) shape small and medium-sized enterprises owner's and managers' responses to environmental challenges and how their capacity to identify, articulate and foreground these values facilitate pro-environmental practice and long-lasting organizational change (Hampton, Blundel, Wahga, Fawcett, & Shaw, 2022). At the time of writing further research is needed to consider how values and mobilized competences vary between the social enterprise's leader(s) and practitioners in the case at hand.

4.1. The next stage of research

To validate the results of the ethnographic process a series of laboratories will be held, gathering the social enterprise's key people and facilitated by the interdisciplinary research unit *Pedagogical Approaches to Sustainable Development and Cultural Heritage Valorization* (PUSH-D) of the University of Florence of which the researcher is part of. The laboratories will use participatory action research to dynamically build new knowledge. The participatory action research represents an educational experience which has as outcomes: 1) co-learning among all its participants, developing a community of practice, enhancing relationships, and thus opening new collaborations and possibilities for future collective action, 2) as well as the validation and the assumption of collective responsibility of the processes and outputs of the research (Orefice, 2006). Augustine et al. (2020) highlights that real-world laboratories and similar approaches can be suitable learning arenas to enable reflexivity, if they are conceptualized as research infrastructure to mobilize tangible resources for experiments as well as to foster the development of interpretive schemes and norms.

The laboratories have three aims:

1. stimulating a joint reflection on the research findings and return a vision of Proforma's identity profile as a Third Sector organization working, in projects and initiatives, that promote sustainable development in the local area, with a mindset inspired by the principles of civil economy and sustainability;
2. designing a self-assessment tool to measure the impact of the social enterprise in terms of sustainable development in the community;
3. understand how the work of Proforma can become a working model to be transferred to other social economy organizations.

The desired output of this PhD study is that of understanding how to *scale out* and *transfer* (Lam et al., 2020) the learning of this science-practice collaboration into a consulting service to help other social economy's organizations to develop their professional identity as change agents for sustainability. A collaboration between the author and the university spin-off Moca Future Designers is currently taking place aiming at shaping a consulting service for social economy organizations interested in strengthening their professional identity as change agents for sustainability. As previously underlined scaling social innovations to effect large-scale change will necessarily involve "a more complex and diverse process than simply diffusing a product or model" (Moore, Riddell, & Vocisano, 2015, p. 21) or "copying best practices" (Augenstein et al., 2020, p. 144) as "solutions that are successful in one context may not always be relevant in others" (O'Brien et al., 2023, p. 1450). Therefore, further research steps will involve an *open scaling model* (Moore,

Riddell & Vocisano, 2015) as a reference point for designing a service tailored to the specific educational needs of the social organization seeking consultancy. In fact, changes that are chosen or embraced by people based on what they deeply care about for themselves and others and expressed in a context-sensitive and relevant manner, are likely to be more effective and enduring (O'Brien et al., 2023).

5. Conclusions. Scaling innovation for systemic change

In this paper, the topic of transformational change promoted by social economy organizations has been introduced. The academic literature has so far neglected the potential of developing a sustainability mindset and associated competences within this sector and their ability in driving change. By applying the sustainability competence framework to the case of Proforma, this paper illustrates how a sustainability oriented social enterprise is already consciously embodying sustainability values and translating them into sustainability initiatives by applying sustainability competences to enhance transformations. By doing so the Proforma model represents an example of fractal agency creating the future right now, in the present (O'Brien et al., 2023).

The analysis also emphasizes tensions regarding the mobilization of sustainability competences, especially in terms of personal development within the organization and thinking systematically about sustainability.

Nonetheless, when researching who does the work of transformation, it is unfair to put pressure on one societal stakeholder, disregarding other options within a heterodox economy. Therefore, it is essential to understand that social economy does not serve as the silver bullet to sustainability transformations, conversely, those organizations represent the seeds of a radically different economy that need to be watered and nurtured, specifically by *scaling deep* (changing values and mindsets) across social economy organizations so that those organizations can consciously promote transformative change.

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