



CSR/SME

Promoting Social Responsibility
in Small and Medium Size Enterprises

HOW TO ORGANIZE A STUDY VISIT TO A SOCIALLY RESPONSIBLE COMPANY

PRACTICAL GUIDE

2005



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1. INTRODUCTION

This practical guide has been developed under the Pilot Project “CSR/SME’s – Promoting Social Responsibility in Small and Medium Sized Enterprises”, supported by the European Commission through the “Leonardo da Vinci” Programme.

The document is destined to CSR trainers / consultants and responsible entrepreneurs willing to share good practices.

A CSR study visit can be organized as a stand alone event, but it will have more impact in the context of a broader CSR awareness raising and training programme.

1.1. OBJECTIVES

The goal of the guide is to provide help in the organization of a study visit to a socially responsible company. After reading it, one should be familiar and able to manage the main aspects regarding:

- ③ The preparation of a CSR study visit;
- ③ The CSR study visit itself; and
- ③ The CSR study visit evaluation and follow-up.

1.2. CONTACTS

In case of inquiry, please contact one of the CSR/SMEs Projects’ partners:

PORTUGAL (Promoter)

CECOA
Rua da Sociedade Farmacêutica, nº 3
1150-112 Lisbon
Tel: ++ 351 213112400
Fax: ++ 351 213112424
E-mail: estudos@cecoa.pt
Contact Person: Cristina Dimas
www.cecoa.pt

ESTONIA (Partner)

GEOMEDIA
Rüütli, 4
51007 Tartu
Tel: ++ 372 7441 675
Fax: ++ 372 5167 362
E-mail: geomedia@geomedia.ee
Contact Person: Krista Noorköiv
www.geomedia.ee

ITALY (Partner)

FRAREG
Viale Jenner, 38
20159 Milan
Tel: ++ 392 6901 0030
Fax: ++ 392 6901 8460
E-mail: info@frareg.com
Contact Person: Alessandra di Pietto
www.frareg.it

AUSTRIA (Partner)

FO.FO.S – Forum for Supporting Self-Employment
and SME
Landstr. Hauptstr. 71/2
1030 Vienna
Tel: ++ 43 650 84 22 874
E-mail: csr@fofos.at
Contact Person: Wolfgang Keck
www.fofos.at

HUNGARY (Partner)

LA VIDA
Molnár U 29 III/11
1056 Budapest
Tel: ++ 36 1 318 75 61
Fax: ++ 36 1 318 75 61
E-mail: a.kenyeres@lavid.hu
Contact Person: Annamaria Kenyeres
www.lavid.hu

THE NETHERLANDS (Partner)

HUESKEN & DE PREE
Zandveldstraat, 24 - 5223 JE
s-Hertogenbosch
Tel: ++ 317 3623 2347
Fax: ++ 318 4745 8071
E-mail: info@huesken.nl
Contact Person: Pim Huesken
www.huesken.nl



2. PREVIOUS STEPS

2.1. DEFINITION OF THE TARGET GROUP

Organizers should start by defining the target group for the visit. Examples of possible target groups are: entrepreneurs / top management, CSR trainers / consultants, students, journalists, opinion makers, etc. The visit programme should be established according to the characteristics and specific situation of the participants.

2.2. COMPANY IDENTIFICATION

Organizers should choose a company that could be seen by the participants as an example of good CSR practices. If the target group is SME's entrepreneurs, it's better to choose a SME, which the visitors can identify with, rather than a big company with lots of resources that could be seen as an "out of reach" example.

Ideally, the visited company should have a meeting room big enough to accommodate the visitors. If that is not possible, the organizers should identify an alternative place where the group can gather for the company presentation, Q&A and discussion.

2.3. NUMBER OF PARTICIPANTS

The desired number of participants must be defined according to the visit objectives, the visited company, the target group chosen and possible financial constraints.

For better results, a group of 12 to 15 people is recommended.

In case of a mixed group (for instance, trainers and trainees or consultants and entrepreneurs) it is possible to go up to 20 participants, provided there are no room, transportation or financial constraints.

2.4. DATE, TIME AND DURATION

Organizers should choose a date, time of the day and visit duration suitable to the participants' situation and availability. In normal circumstances, the whole program should take between 2.5 and 4 hours, depending on the distance from the meeting point and the dimension of the premises.



3. RECOMMENDED VISIT PROGRAMME

Organizers should arrive at least 30 minutes in advance and stay until the end of the visit. Recommended sequence and duration of the activities is presented below.

3.1. WELCOME (🕒 10 MIN.)

Organizers should provide a warm welcome to every participant, especially if people don't know each other. It is important that participants feel at ease, talk to each other and share their personal experiences.

The available documentation should be distributed at this time.

3.2. OPENING MEETING (🕒 10 MIN.)

Depending on the circumstances, the opening meeting can take place in a meeting point outside the visited company or in the company itself.

During the opening meeting, organizers should welcome the participants, provide a short self presentation and inform the participants of the visit programme and objectives, safety measures (if applicable) and other relevant information.

3.3. COMPANY PRESENTATION (🕒 20 - 30 MIN.)

The next step is the company presentation. It is highly recommendable that it is performed by the top management.

Company presentation instructions are presented in Chapter 4.

3.4. VISIT TO THE FACILITIES (🕒 20 - 60 MIN.)

It is important that participants should be allowed to visit the company premises. This will give them then a chance to have a clearer idea about company activities, to observe some of the points referred in the company presentation and to establish direct contact with company staff.

3.5. QUESTIONS AND ANSWERS (Q&A) (🕒 45 - 60 MIN.)

Following the visit, the participants should go back to the meeting room and discuss what they have seen. The company manager should be present and answer all questions raised.

3.6. EVALUATION (🕒 15 MIN.)

At the end of the visit, all participants should fill the feedback questionnaire (Annex 3) and give it to the organizers.

It is also recommended that participants share their impressions about the visit. If the participants are consultants/trainers or entrepreneurs, it is desirable that they establish some commitment for their own professional activity.



4. COMPANY PRESENTATION

The company presentation is an important part of the event. It should be carefully prepared in a joint effort between organizers and company owners / managers.

Up to date, only a few pioneering responsible SMEs have produced a written CSR or sustainability report. Nevertheless, a CSR presentation can be regarded as a “summary” of a CSR report. In fact, it can be the first step to address responsibility reporting on a written publication.

The aim of a company presentation is to consider all important data about the particular engagement in CSR and present the economic, environmental and social performance in a transparent manner. Preparing a CSR presentation can also have a positive effect on identifying further inner corporate processes, which leads to evaluating and also improving company’s practices in regards of responsibility.

The effort and amount of work that has to be undertaken will undoubtedly be significant. However, besides the marketing impact that results from presenting it to an external audience, awareness of CSR inside the company can be raised during the preparation period by involving employees (i.e. in-house interviews) as well as partners, customers, NGOs (i.e. short statements) and other stakeholders.

4.1. SUGGESTED PRESENTATION STRUCTURE

Considering that the main purpose of a study visit is to provide a CSR benchmarking opportunity to the visitors, the company presentation should be delivered in such a way that it induces them to ask themselves: “Why should I / my company be responsible too?”

As transparency and credibility are one of the key elements of CSR, the speaker should present the company in a balanced way, reflecting its strengths and weaknesses, and avoiding ideal unrealistic images that might not be confirmed in the visit that follows the presentation.

SME have lots of room for creativity in the preparation of their own CSR presentation.

If the company already has a CSR oriented self presentation, organizers should review its contents and make sure of its adequacy to the event purposes, recommending any adjustments they consider necessary.

In case the visited company have to prepare the company presentation from a scratch, we recommend doing it accordingly to the following structure:

- ① Company History, Figures & Facts
- ② Market Information
- ③ CSR Issues
- ④ CSR Initiatives and People Involved
- ⑤ Main Drivers to be Responsible
- ⑥ CSR Challenges
- ⑦ Benefits from being Responsible
- ⑧ Conclusions
- ⑨ Questions and Answers (Q&A)

Table 1 contains a more detailed list of topics that could be included in the company presentation.



TABLE 1 – COMPANY PRESENTATION TOPICS

| | |
|---|--|
| <p>1) Company History, Figures & Facts</p> <ul style="list-style-type: none"> ☉ mission statement ☉ vision and values ☉ key company milestones ☉ main products and services (product life cycle and supply chain) ☉ management and staff (organization chart) ☉ main company figures ☉ what makes the company special? | <p>5) Main Drivers to be Responsible</p> <ul style="list-style-type: none"> ☉ ethics, company values ☉ environmental stewardship ☉ corporate governance ☉ community relations ☉ employee relations ☉ consumer pressure ☉ etc. |
| <p>2) Market Information</p> <ul style="list-style-type: none"> ☉ business model, marketing strategy and target groups ☉ market size and addressable market ☉ competitive landscape ☉ competitive advantage ☉ use of communications and public relations | <p>6) CSR Challenges</p> <ul style="list-style-type: none"> ☉ due to the complexity of CSR ☉ inner corporate ☉ in the market ☉ due to stakeholders' expectations ☉ financially ☉ other difficulties |
| <p>3) CSR Issues</p> <ul style="list-style-type: none"> ☉ identified topics and stakeholders ☉ stakeholder dialogue on CSR goals and timeframe ☉ defining, organizing and measuring CSR strategies ☉ reporting CSR process and communication with stakeholders | <p>7) Benefits from being Responsible</p> <ul style="list-style-type: none"> ☉ corporate reputation ☉ stakeholder goodwill ☉ innovation in products and services ☉ access to new markets or co-operations ☉ etc. |
| <p>4) CSR Initiatives and People Involved</p> <ul style="list-style-type: none"> ☉ which current initiatives reflect your philosophy and responsibility? ☉ state of the art of CSR in the company containing initiatives/good practices in: <ul style="list-style-type: none"> - workplace - environment - marketplace and - community ☉ people involved (employees and stakeholders) in all stages of CSR development ☉ next steps and opportunities | <p>8) Conclusions</p> <ul style="list-style-type: none"> ☉ short summary of the presentation hold ☉ changes emerged and expected outlook due to CSR in <ul style="list-style-type: none"> - workplace - environment - marketplace and - community ☉ challenges and benefits |
| <p style="text-align: center;">Questions and Answers (Q&A)</p> <p>The speaker should encourage the audience to participate actively. He should also inform the audience of the existence of a "Q&A" period.</p> | |



4.2. PRACTICAL TIPS FOR A POWERPOINT PRESENTATION

For your convenience, this practical guide includes a PowerPoint company presentation template (Annex 6), organized according to the above presented structure.

If the visited company decides to carry out a PowerPoint presentation, remember to:

- ① keep each overhead brief (use as little text as possible)
- ② use short phrases, not complete sentences
- ③ limit each slide to just a few bullets
- ④ avoid too much information on a slide
- ⑤ present only one idea per slide or graphic
- ⑥ use two or three slides to explain a complex idea
- ⑦ include only information that really underlines a statement
- ⑧ formulate headlines that summarize each slide
- ⑨ use positive keywords and verbs instead of nouns
- ⑩ reduce text to six to eight lines per slide
- ⑪ use colours and fonts uniformly throughout the presentation

When the presentation is ready, remember to rehearse it and measure how long it lasts. If it appears to be too short, or too long, make the necessary adjustments and try again.

4.3. QUESTIONS & ANSWERS

It is crucial that all the participants have the opportunity to raise their questions. For this purpose, there should always be a comprehensive Q & A period.

During the Q & A period, the organizers should act as facilitators and try to involve everybody in the dialogue.

Company representatives should try to answer all the questions in a direct and transparent manner, unless the subject is confidential.

In case it is decided to have a Q & A period immediately after the presentation and its taking more than expected, organizers might decide to intervene and interrupt it, reminding the visitors that they still have to visit the premises and that they will still have an opportunity to raise further questions later on.



5. LOGISTICS

5.1. REGISTRATIONS

Organizers should prepare an application form and keep a record of the participants.

5.2. DOCUMENTATION AND MATERIALS

List of recommended materials:

- ④ List of participants
- ④ Visit programme
- ④ Welcome note (Annex 1)
- ④ Awareness-raising questionnaire from the DG Enterprise (Annex 2)
- ④ Company presentation summary
- ④ Participant's feedback questionnaire (Annex 3)

Organizers should check with the company management the need of any training materials (computer, video projector, flipchart, paper, pens, etc...) and provide whichever is adequate.

5.3. TRANSPORTATION

According to the company location and the particular circumstances of the event, organizers have to decide if they provide transportation for all the participants (if the meeting point is not at the visited company) or provide a map with clear indication of the company location and of the best way to get there.

If providing transportation, organizers should guarantee adequate insurance coverage for all participants.

5.4. CATERING

It is recommended to arrange some refreshments during the visit. Organizers should agree with the company management who will be providing and paying for it.

5.5. GIFTS / SOUVENIRS

As a way of showing appreciation and celebrate the event, organizers should provide a suitable gift to the company (or the company management).

If possible, all the participants should also receive a symbolic souvenir connected with the event, or with the company and its CSR activities.



6. PROMOTION

As soon as the decisions presented in Chapter 2 have been taken, organizers should proceed with the promotion of the event.

It is recommended that the promotion contacts begin 2 months in advance and that invitations are sent around 3 weeks before the event, but this may vary according to country, region and circumstances.

6.1. INVITATION

Organizers should prepare an attractive one page invitation, including:

- ④ Introduction to CSR
- ④ Event description (location, date, time)
- ④ Brief company presentation
- ④ Reason why the company was chosen
- ④ Expected benefits from the visit
- ④ Organizers' contacts
- ④ Attendance fee (if applicable)

The invitation should be accompanied by an application form.

6.2. EVENT DISSEMINATION

The invitation should be circulated between the selected target groups. Examples of possible people / organizations to contact are:

- ④ Organizers' contacts / clients
- ④ Visited company contacts / clients / suppliers
- ④ Training centres
- ④ Consultants / consultancy companies
- ④ Professional / local associations
- ④ SME Institutes
- ④ Town hall / local authorities
- ④ Universities
- ④ Business schools
- ④ Local high schools



6.3. DIVULGATION CHANNELS

Organizers should use the divulgation channels that suit best their organization and the selected target group and choose the most cost efficient ones. Suggestions:

- ① Organizers' website
- ① Company website
- ① Direct mail
- ① E-mail
- ① Phone
- ① Word of mouth
- ① Newspapers

For a stand alone event, a multiple channel approach is strongly recommended.

However, if the organizers manage to identify a specific target group which gathers regularly, a simple direct approach will do.



7. FINANCE

Organizers should always remember that the main objective of the visit is to disseminate good CSR practices and take all the financial decisions according to this principle. They should also try to find funding to support the visit.

The definition of the participants' fees should depend on the organizers' situation, the local habits and the target group. In some cases, making participants pay for the visit will make it look more professional and motivating. But in other cases, participants won't come unless it's for free or at a symbolic amount.

Organizers should prepare a budget for the study visit and try to avoid financial setbacks.

7.1. BUDGET PREPARATION

In Annex 4, you will find an Excel file with a study visit draft budget, including a list of predictable costs and possible income sources.

Worksheet 1 (protected) has a blank template budget where you only have to fill in the yellow cells: price per unit and, where necessary, quantity. All the calculations will be made for you automatically.

In worksheet 2 (unprotected) you have an example of budget already filled in.

7.2. COSTS

☉ Staff costs:

Travel costs: includes all travel you make for organizing the study visit: the preparation visits, the study visit itself and any evaluation visit. In case you use public transport you should include the cost of the tickets.

Staff fees: in this cell you register all the time necessary to organize the visit: preparation time, study visit time and also time for evaluation and follow-up.

☉ Operating costs:

Here you can put all the other costs incurred, such as printing, advertisement, communication (mail, telephone, fax, e-mail), gifts, conference room, materials, catering, etc.

In here you find also a place to include participants' travel expenses. If you ask for a participation fee, consider sharing travel expenses equally among the participants, thus making it easier to attend for those who are distant.

Remember to calculate the costs of sending the evaluation forms and time to work out the evaluation.

Don't forget to discuss with the visited company any costs they will incur and agree in advance if they will be reimbursed.

All costs that aren't mentioned in the listed fields can be submitted as 'other costs'. Alternatively, you can insert new rows, but if you do it, please make sure formulas are still working properly.



7.3. INCOME

- ⦿ Participant's fee: if you don't have other criteria, it should be the exact amount needed to balance the budget.
- ⦿ Suggestions for subsidy: EU or Government programmes, special local funds, SME associations.



8. VISIT EVALUATION AND FOLLOW-UP

8.1. VISIT EVALUATION

Organizers should make a final evaluation of the study visit.

It is recommended that this evaluation is done in a formal meeting, ideally between one and two weeks after the visit.

Prior to the evaluation meeting, the organizers should process all the information collected through the participant's feedback questionnaire (Annex 3).

Feedback from the visited company is also very important, not only from the management but also from the company's staff.

The organizers should prepare a final written evaluation report with the main results and conclusions. In order to facilitate the process, a study visit evaluation report form is also presented (Annex 5).

8.2. VISIT FOLLOW-UP

A CSR study visit is the perfect occasion to get participants involved in any kind of CSR activity, independently of their professional situation.

Therefore, it is strongly recommended that organizers try and find out what can be done to facilitate that kind of involvement. Any kind of initiatives are welcome and participant's commitment must be one of the organizers priorities.

Some suggestions to involve the participants:

- ③ Participate in other similar visits
- ③ Open their own companies to similar visits
- ③ Organize working groups among the participants
- ③ Organize working groups inside their own companies enabling to transfer into practice some of the ideas collected from the study visit
- ③ Enter a CSR training programme
- ③ Enter a CSR consultancy programme
- ③ Develop their own CSR business case in order to present it to the company stakeholders
- ③ Create a newsgroup or a Forum to discuss and share information



Leonardo da Vinci Pilot projects

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