

Course Curricula for ILPO55 Qualifications

(ILPO55: Output 5 Activity 2)

Social Responsibility Facilitator

MCAST

Unit Title: Introduction to Social Responsibility in the Financial Services Sector

EQF Level: 5

Credit Value: 2

Guided Learning Hours: 15

Unit Description:

Financial Institutions can be considered as important components of the worldwide economic system. Such entities provide consumers and commercial clients with a wide range of financial services. The number of people affected by activities of financial organisations tends to be very large and normally entails long term relationships. After the 2008 financial crisis, many were concerned about the decline in confidence in financial services institutions.

This unit therefore introduces learners to the general notions and definitions of Social Responsibility as applied to the financial services sector. Importance will be given to the need for trust, accountability, transparency and particularly the issue of governance; which is critical in different areas including the legal, ethical and economic elements.

Learning Outcomes:

On completion of this unit the learner will be able to :

- 1. Analyse and evaluate the pertinent CSR activities integrated to business and non-business as applied in the financial services sector.*
- 2. Recognise and select the benefits of social responsibility for business.*

Knowledge, Skills & Competences

Competences: at the end of this unit, a learner will have acquired the responsibility and autonomy to	
1. Evaluate CSR activities integrated into business and non-business within own organisation	
2. Demonstrate the ability to work in a “socially responsible” manner	
Knowledge At the end of this unit, a learner will :	
1. Understand and recognise the key-factors that contribute towards social responsibility within the financial services sector.	
2. Understand the benefits of social responsibility for an organisation	
3. Recognise the importance of trust, accountability and transparency	
4. Identify the need for good corporate governance	
5. Be familiar with regulatory requirements in the context of social responsibility	
6. Understand the key-principles of sustainability	
Skills: at the end of this unit, a learner will have mastered the following skills	
Applied Knowledge and Understanding	1. Apply knowledge of social responsibility principles in own work
	2. Engage with colleagues, superiors and other members of own organisation in applying social responsibility activities.
Communication Skills	1. Discuss the pertinent issues related to social responsibility in financial services
	2. Present own ideas within own organisation or particular financial services fora
	3. Describe the benefits of social responsibility measures for an organisation
	4. Define the key-principles of sustainability
Judgmental Skills	1. Critically analyse issues related to social responsibility in financial services
	2. Recommend ideas that can enhance the social responsibility of own organisation
Learning Skills	1. Undertake independent research using printed or online media to keep abreast with examples of good practice in the field.

Unit Content:

1. Analyse and evaluate the pertinent CSR activities integrated to business and non-business as applied in the financial services sector.

- Social responsibility as good for business
- Good Reputation
- Employee Retention
- Employer branding
- Understanding of the needs of stakeholders/consumers
- Using the knowledge and expertise of experienced employees within the context of social responsibility
- Improving competitiveness
- Enhancing the organization internal climate

2. Recognise and select the benefits of social responsibility for business.

- Building Trust in the system
- Ethical, Legal and Economic Responsibilities
- Corporate Governance and Compliance
- Responsibility in lending, investment, risk and asset management, money laundering
- Accountability and Transparency
- Sustainability (Economic, Social and Environmental)
 - Sustainability Direction
 - Financial Empowerment
 - Sustainable Transitions
 - Stakeholder engagement
 - UN Sustainable Development Goals
 - Materiality
 - Ratings
 - Regulation and supervision
 - Our Stance
 - Animal welfare
 - Climate
 - Defence
 - Energy
 - Extractives industry
 - Food speculation
 - Human rights
 - Income taxes



- Maritime sector
 - Palm oil
 - Resource scarcity
 - Transparency
 - Reporting on Sustainability
- Regulatory Requirements

Delivery:

It is recommended that this unit is delivered through methods that encourage active learning. Prospective trainers/instructors are encouraged to use a combination of lectures, discussions, group work and seminars/workshops, both online and face to face. In view of the nature of the unit, it is also suggested that relevant up-to-date case studies are used as well so as to initiate a healthy discussion.

Throughout the unit, learners should be encouraged to develop critical, innovative and evaluative thinking, to demonstrate that lessons have been taken on-board to facilitate an improved end outcome. Learners should also be encouraged to carry out individual studies and researches to consolidate and enhance their knowledge.

Assessment

The purpose of assessment is to confirm the achievement of learning outcomes. The choices selected from the following list are only suggestions. One is free to adapt to different situations or to choose other methods. It is suggested that this unit is assessed through a critical analysis of a case study.



Assessment Method

- assignment _____ words
- clinical assessment
- clinical report
- dissertation _____ words
- examination
- fieldwork
- logbook
- long essay _____ words
- mentoring
- ongoing assessment
- oral examination
- oral exercises
- placement
- portfolio
- practical
- presentation
- project
- reflective diary
- report
- research paper
- seminar paper
- thesis _____ words
- transcription
- workbook
- workshop
- written exercises
- written test
- Other (please specify) Case Study

Indicative Reading

- Corporate Social Responsibility: Readings and Cases in a Global Context by Andrew Crane, Routledge, ISBN-13: 978-0415683258.

Unit Title:	The Role of Internal and External Stakeholders
EQF Level:	5
Credit Value:	2
Guided Learning Hours:	15

Unit Description:

Banks and other financial services institutions affect a large number and variety of people. One can consider both internal and external stakeholders. This includes the owners, officers, employees, borrowers, depositors, government and communities. Hence it is important that the *'social responsibility facilitator'* understands the role/function of such stakeholders.

This unit will therefore introduce learners to the different internal and external stakeholders, elements that should be included in stakeholders' dialogues and how to deal with issues related to social responsibility.

Learning Outcomes:

On completion of this unit the learner will be able to :

- 1. Use stakeholder analysis to Identify individuals or organisations that are impacted by or can contribute to organisation's CSR measures;*
- 2. Analyse the role of internal and external stakeholders within the context of Social Responsibility;*



Knowledge, Skills & Competences

Competences: At the end of this unit, a learner will have acquired the responsibility and autonomy to

1. Deal with different stakeholders within the context of social responsibility in the financial services sector

Knowledge: At the end of this unit, a learner will :

1. Recognize the internal stakeholders of an organisation
2. Select the external stakeholders of an organisation
3. Be familiar with the notions of Stakeholder Engagement, Analysis and Management
4. Describe the process of stakeholder analysis
5. Identify the role of stakeholders in the context of social responsibility in the financial services sector
6. Explain the role of the social responsibility facilitator in working with stakeholders

Skills: At the end of this unit a learner will have mastered the following skills

Applied Knowledge and Understanding	1. Follow professional and ethical standards when working with stakeholders
	2. Develop appropriate relationships with stakeholders
Communication Skills	1. Communicate effectively with internal and external stakeholders within the context of social responsibility
	2. Discuss the role of internal and external stakeholders in the context of social responsibility
Judgmental Skills	1. Distinguish between the different typologies/categories of stakeholders
	2. Identify prospective opportunities for collaboration with stakeholders, in the context of social responsible activities
Learning Skills	1. Reflect upon own role as social responsibility facilitator and how to be effective in dealing with stakeholders

Unit Content:

1. Use stakeholder analysis to Identify individuals or organisations that are impacted by or can contribute to organisation's CSR measures.

- Internal Stakeholders
- External Stakeholders
- The stages to support stakeholder analysis
- Identifying and mapping , internal and external stakeholders

2. Analyse the role of internal and external stakeholders within the context of Social Responsibility

- Issues for stakeholders: return on investment (RoI), conflicts between needs of the organisation and those of stakeholders, socially responsible investments
- Importance of Stakeholder Dialogue and creation of value relationships
- Internal and external stakeholders as active contributors to social responsibility
- Maintaining the appropriate boundaries
- Importance of ethics
- The social responsibility facilitator's role in relation to stakeholders

Delivery:

It is recommended that this unit is delivered through methods that encourage active learning. Prospective trainers/instructors are encouraged to use a combination of lectures, discussions, group work and seminars/workshops both online and face to face. In view of the nature of the unit, it is also suggested that relevant up-to-date case studies are used as well so as to initiate a healthy discussion.

Throughout the unit, learners should be encouraged to develop critical, innovative and evaluative thinking, to ensure that lessons have been taken on-board to facilitate an improved end outcome.

Learners should also be encouraged to carry out individual studies and researches to consolidate and enhance their knowledge.

Assessment

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<input type="checkbox"/>	assignment _____ words
<input type="checkbox"/>	clinical assessment
<input type="checkbox"/>	clinical report
<input type="checkbox"/>	dissertation _____ words
<input type="checkbox"/>	examination
<input type="checkbox"/>	fieldwork
<input type="checkbox"/>	logbook
<input type="checkbox"/>	long essay _____ words
<input type="checkbox"/>	mentoring
<input type="checkbox"/>	ongoing assessment
<input type="checkbox"/>	oral examination
<input type="checkbox"/>	oral exercises
<input type="checkbox"/>	placement
<input type="checkbox"/>	portfolio
<input type="checkbox"/>	practical
<input type="checkbox"/>	presentation
<input type="checkbox"/>	project
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<input type="checkbox"/>	workbook
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<input type="checkbox"/>	written exercises
<input type="checkbox"/>	written test
<input checked="" type="checkbox"/>	Other (please specify) Case Study

Indicative Reading

- Corporate Social Responsibility: Readings and Cases in a Global Context by Andrew Crane, Routledge, ISBN-13: 978-0415683258.



Unit Title: Strategies and Tools for Social Responsibility Implementation

EQF Level: 5

Credit Value: 2

Guided Learning Hours: 15

Unit Description:

The implementation of Social Responsibility measures requires effective strategies and tools in order to be effective. The Social Responsibility Facilitator has an important role, in using his/her experience in the Financial Services Sector, so as to support the management of a financial services organisation in this context.

It is also fundamental that financial services organisations also understand the economic consequences of ethical failures. This unit will therefore consider these key aspects together with how the impact of corporate social responsibility can be measured.

Learning Outcomes:

On completion of this unit the learner will be able to :

- 1. Evaluate the role of the Social Responsibility Facilitator in supporting management for the implementation of Corporate Social Responsibility (CSR);*
- 2. Produce and Apply appropriate tools to implement and measure the impact of Social Responsibility activities;*

Knowledge, Skills & Competences

Competences: At the end of this unit a learner will have acquired the responsibility and autonomy to	
1. Participate in Social Responsibility activities by providing support to management	
2. Practice strategies and tools for the implementation of Social Responsibility	
Knowledge : At the end of this unit, a learner will	
1. Understand the role of the social responsibility facilitator in promoting ethical strategies and business behaviour	
2. Be familiar with approaches to managing an organisation’s ethical conduct	
3. Identify methods to conduct an internal and external analysis of the organisation	
4. Describe the use of key performance indicators to measure the impact of social responsibility activities	
Skills: At the end of this unit a learner will have mastered the following skills	
Applied Knowledge and Understanding	1. Conduct internal and external analysis in terms of social responsibility measures and situational understanding
	2. Facilitate the implementation of social responsibility activities
	3. Implement activities to measure and evaluate the objectives set out by management for social responsibility
Communication Skills	1. Report progress and results of social responsibility activities to management
	2. Communicate with colleagues and management to promote ethical behaviour within own financial services organisation
	3. Discuss and share improvements in social responsibility endeavours
Judgmental Skills	1. Measure the impact of social responsibility and its effects
	2. Identify opportunities to promote socially responsible behaviour internally and externally
	3. Classify the different types of Social Responsibility measures based on the 3 main dimensions of sustainability— environmental, social, and economic.
Learning Skills	1. Reflect upon own role as social responsibility facilitator and how to be effective in assisting management in it’s’ implementation.

Unit Content:

1. Evaluate the role of the Social Responsibility Facilitator in supporting management for the implementation of Corporate Social Responsibility (CSR)

- The Social Responsibility Facilitator as a professional support to management
- Promoting ethical strategies and business behaviour
- Approaches to manage an organisation's ethical conduct
- Demonstrating a Social Conscience

2. Produce and apply appropriate tools to implement and measure the impact of Social Responsibility activities

- Measuring and evaluating the impact of the social responsibility strategy within the organisation
- Diagnosing the current situation of the organisation (identifying opportunities for improvement)
- Conducting internal and external analyses (Identifying the internal resources and capabilities of the organisation, SWOT Analysis)
- Identifying the key Performance Indicators related to the impact of social responsibility
- Marketing activities and Social Responsibility
- Achieving the pre-set objectives

Delivery:

It is recommended that this unit is delivered through methods that encourage active learning. Prospective trainers/instructors are encouraged to use a combination of lectures, discussions, group work and seminars/workshops, both virtual and face to face. In view of the nature of the unit, it is also suggested that relevant up to date case studies are used as well so as to initiate a healthy discussion. Throughout the unit learners should be encouraged to develop critical and evaluative thinking, to ensure that lessons have been taken on-board to facilitate an improved end outcome. Learners should also be encouraged to carry out individual studies and researches to consolidate and enhance their knowledge.

Assessment

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Indicative Reading

- Corporate Social Responsibility: Readings and Cases in a Global Context by Andrew Crane, Routledge, ISBN-13: 978-0415683258.



Unit Title: Professional Knowledge, Skills and Competences for the Social Responsibility Facilitator

EQF Level: 5

ECVET: 2

Guided Learning Hours: 15

Unit Description:

In order for the social responsibility facilitator to be effective in his/her role, certain knowledge, skills and competences are required. These can be considered to be a package that enables the social responsibility facilitator (SRF) to work concretely in the field of CSR. Effective communication, problem solving skills, conflict resolution, team-work and work ethics are few of the most important soft skills that enable the social responsibility facilitator to fulfil his duties.

Moreover, the social responsibility facilitator needs to be sensitive to issues affecting society and the environment around his/her organisation. S/he needs to be able to think critically and creatively and suggest activities which the company can pursue in order to improve these challenges. This unit will therefore introduce learners to such topics.

Learning Outcomes:

On completion of this unit the learner will be able to :

1. *Apply the techniques of effective communication;*
2. *Practice critical and creative thinking and emotional intelligence;*
3. *Use appropriate techniques to solve problems and deal with conflicts;*



Knowledge, Skills & Competences

Competences - at the end of this unit a learner will have acquired the responsibility and autonomy to:

1. Communicate effectively in the context of social responsibility
2. Deal with problems and conflicts that might occur when performing tasks as a Social Responsibility Facilitator

Knowledge - At the end of this unit, a learner will:

1. Identify the principles of Emotional Intelligence
2. Define the five key elements of Emotional Intelligence
3. Understand the importance of effective communication in CSR
4. Deal with different critical and creative thinking techniques
5. Illustrate different problem solving methods and strategies
6. Understand the importance of good listening skills for optimal communication
7. Indicate different types of conflict and different strategies for dealing with them
8. Explain the term Soft Skills and their importance for the workplace
9. Know the importance of constructive feedback
10. Be familiar with different types of human values, personalities and attitudes and with the importance of respect
11. Know different ways of communication in the workplace
12. Be familiar with internal and external ethical issues and their impact on a business organization
13. Understand the importance of Teamwork on the workplace
14. Distinguish when to provide constructive criticism and feedback and when not to
15. Be familiar with the ethics rules related to the workplace

Skills: At the end of this unit a learner will have mastered the following skills

Applied Knowledge and Understanding	1. Apply the principles of critical & creative thinking and emotional intelligence when working within the SR environment
	2. Plan and conduct brainstorming sessions



	3. Use creative thinking strategies in the design and execution of CSR strategies
	4. Manage different problem solving methods and/or strategies in order to identify the potential solution
	5. Work within a team practicing ethical behaviour and communication skills
Communication Skills	1. Communicate effectively both verbally and non-verbally using different communication channels
	2. Interact in a professional manner with colleagues, clients and superiors using different communication skills and channels
	3. Participate actively in brainstorming and discussions sessions.
	4. Present own ideas politely and respectfully in different scenarios
	5. Communicate effectively through verbal, non-verbal and written communication using an appropriate register
Judgmental Skills	1. Analyse a problem and try to propose adequate and coherent solutions
	2. Identify the potential causes of a conflict situation and face its solution
	3. Analyse the importance of Emotional Intelligence effects in the workplace
	4. Determine possible factors which can lead to conflict between individuals
Learning Skills	1. Evaluate own knowledge and application of different soft skills in order to identify own strengths and weaknesses

Unit Content:

1. Apply the techniques of effective communication

- General Principles of communication
- Verbal, Non Verbal and written Communication
- Interpersonal Skills , active listening, questioning techniques, barriers to communication,
- Different communication channels; Verbal; Written; Electronic and Non-Electronic, etc.
- Giving effective feedback; Benefits of constructive feedback; Negative effects of bad and/or missing feedback; constructive criticism
- Effective communication in writing; Appropriate registers; Clear language
- Ethical Communication and Netiquette



2. Practice critical and creative thinking and emotional intelligence

- Defining emotional intelligence
- Different Soft skills: Communication; Decision Making; Problem Solving; Negotiation, Adaptability; Time Management; Teamwork and Collaboration; Critical Observation; Conflict Resolution
- Daniel Goleman's 5 key elements of emotional intelligence
- Improving own emotional intelligence
- Brainstorming and lateral thinking
- Mind mapping , rich pictures and 'envisioning the future'
- Work Ethics: Ethical Behaviour; Ethics rules on the workplace; harassment and its repercussions

3. Use appropriate techniques to solve problems and deal with conflicts

- Identifying sources of conflict
- Distinguish different types of conflict
- Managing different Strategies and Skills for dealing with conflict
- Assertiveness Skills
- The Importance of dealing with conflict: the consequences of unresolved conflicts; conflicts as an opportunity for growth
- Effects of Conflict: Stress, emotions
- Problem Solving Strategies: root causes analysis; trial and error; etc.
- Problem Solving Methods: GROW model; PDCA; etc.

Delivery:

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<input type="checkbox"/>	written exercises
<input type="checkbox"/>	written test
<input checked="" type="checkbox"/>	Other (please specify): <i>Case Study</i>

Indicative Reading

- Personal Effectiveness by Alex Murdock and Carol N. Scutt, Routledge, ISBN-13: 978-0750656221
- Work Ethics and the Generation Gap! : Which Ethical Track Are You On? by Robin L. Rask
- Brilliant Personal Effectiveness : What to Know and Say to Make an Impact at Work by Douglas Miller, Pearson, ISBN-13: 978-1292077567