

SOCIAL COOPERATIVE SAD



Executive Summary

The cooperative SAD has always had the aim to provide the elderly, disabled, and temporarily non-self-sufficient people with health and care services. The cooperative has managed to sense the emergence of a new welfare and to respond to it with **organisational change** and **service innovation**.

A new socio-economic reality is currently emerging, a reality in which cooperatives can no more act just as simple service providers, but must undertake an active role *vis-à-vis* with the public authority and the local citizens.

The development therefore of the cooperative SAD deserves particular attention for its ability to innovate social services in order to suitably answer to the needs of the users (see coop Assieme experience) and the competences available. A particularly remarkable example of innovation is the experimental co-housing project (Casa alla Vela), which was set up in 2014, in which elderly and young people live together, sharing daily tasks, as well as common rooms and life experiences.

Moreover, SAD stands out for its organisational style developed over the past years. Its activities fulfil the quality criteria required by the **Carta dei servizi** (Service Charter) and the **Carta dei comportamenti** (Behaviour Charter). It is recognized with a **Quality Management Service** certification according to the UNI EN ISO 9001 regulation: Vision 2008 in 2003, for domestic assistance, and in 2006 for the Centro Diurno, for its management, design and provision of day centres for the elderly. In 2012 SAD also received the **Family Audit** certificate for its promotion of numerous initiatives to foster reconciliation between work and family.

Section 1: Description of the case

1.1. CONTEXT AND HISTORY

*From volunteers
to professionals*

The social cooperative SAD was set up in 1990 thanks to the impetus of a small group of volunteers determined to transform their social commitment into a professional service, and so became the founder members. The services provided by SAD on the local territory according to specific areas of competence are active in:

- the municipality of Trento;

*Establishment
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- the Comunità di valle Rotaliana-Konigsberg and the Comunità della Val di Cembra;

- the Comunità della Val di Non.

Its mission is to guarantee “**professional social assistance and care**” and to build its actions on the values of transparency, accuracy, respect, trust, and responsibility. One of its goals is, and always will be, to support and keep people in need in their own living environments as long as possible, facilitating bonds with family, friends, neighbours, and their own environment. SAD works together with both public and private sectors, integrating the welfare supply and demand with the design and provision of social services.



assistenza sociale con professionalità e cura

1.2 LIFE CYCLE

i) Conditions which allowed start up and founding as well as implementation

The social cooperative SAD was set up in 1990 thanks to the impetus of a small group of volunteers determined to transform their social commitment into a professional service. The goal was to create a range of socio-assistance services for the disabled, elderly, sick, and non-self-sufficient people within the Trentino region.

ii) organisational design—why was the legal form chosen, why were certain governance models chosen, stakeholders, etc.:

Since its establishment, the cooperative has built its identity on the standard social cooperative based on the law 381/91, which foresees: the main objective as general benefit to the community and social integration of the citizens; various categories of stakeholders, members, including paid employees, beneficiaries, and volunteers (up to 50% of the members); financial investors and public institutions.

iii) growth and expansion of the SE, focusing on the various resources (finance, voluntary, etc.) mobilized at each stage;

The 20-year experience in Trentino has allowed SAD to directly get to know and analyse the needs and conditions of the elderly population, and therefore to propose an innovative vision of the possibilities lying within the community.

Over the years, the cooperative has developed in terms of services (private personal services, experimentation of new ideas such as co-housing) and in terms of professionalism. Volunteers have always been a fundamental component of the cooperative, as they help spreading, and constantly enact, the SAD's founding values: young and adults working in different areas and providing different services.

iv) any crisis (small or large) moments along the way? or moments that were not a crisis but required some changes? How were these resolved/addressed?

Some years ago, the cooperative began a new research activity in order to find and enact **a new cooperative model and organisational system, imperative requirement for further development.**

The cooperative started to innovate its services also in relation to the **particular mutating situation of the welfare state**, which characterises the current historical context. In fact, a new socio-economic reality is now emerging: a reality in which cooperatives can no more act just as simple service providers, but work close to the community, translating their needs and interacting with public authorities in order to renew what the system is able to offer must undertake an active role directly with public authorities and citizens.

In the last few years the services have been innovated in order to suitably answer to the needs of the users (see coop Assieme experience) and the competences available. A particularly remarkable example of innovation is the experimental co-housing project (Casa alla Vela), which was set up in 2014, in which elderly and young people live together, sharing daily tasks, as well as common rooms and life experiences.

'Casa alla Vela' is a multigenerational housing project offering the elderly a housing solution in which they can share the costs of food (with cooking provided by carers), electricity, water, and rent. The cost of caregivers, whose presence is guaranteed 24 hours a day, seven days a week, is also shared. In the

same building, another apartment hosts a group of specifically selected students who can support their older neighbours on a voluntary basis, thus encouraging intergenerational solidarity. The social and community relations of the aged persons are also maintained and reinforced by the visits of their friends and relatives. The social cooperative SAD, which is in charge of managing the project, supervises the entire initiative, supported by other voluntary associations. The house currently hosts five elderly women and six students. This family-like setting makes the costs of assistance and daily life more sustainable for older persons, and fosters their social integration by providing the setting for intra- and intergenerational exchange. With home-based care services and community assistance, the elderly people are empowered to live independently and therefore do not need to apply to a nursing home.

1.3 CORE BUSINESS MODEL

The SAD cooperative offers a broad range of services which can be grouped into two main categories.

SERVICES PROVIDED IN AGREEMENT WITH THE PUBLIC AUTHORITY (Comuni, Comunità di Valle, Azienda Provinciale per i Servizi Sanitari), including:

- home help
- home delivery of meals
- management of a *Centro Diurno* (Day Centre)
- management of a *Centro Servizi* (Service Centre)
- hairdresser service at retirement home
- organisation and management of summer stays for elderly people
- promotion of different initiatives for the community in the Val di Non territory
- transport and support for disabled people (*MuoverSi* service)



PRIVATE PERSONAL SERVICES. Innovative and **customised** personal assistance services provided privately. The services are designed to respond to the emerging needs expressed by society, comprising:

- *Casa alla Vela*: experimental project of **co-housing** since 2014, in which elderly and young people can live together, yet in different apartments.

They share the daily tasks, as well as common rooms and life experiences.

Context of the project: after a certain age, even the elderly who are self-sufficient may start having problems living alone, so their children/relatives fear

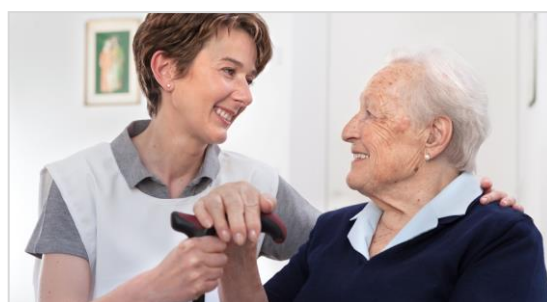


the consequences of possible domestic accidents. For many, the possibility of entering a retirement home does not represent a suitable solution and neither does the expensive alternative of a full-time home help service.

Therefore, the project emerges from the analysis of the needs of the elderly and from the possibilities already present within the local community.

- **Il Quadrato** (www.ilquadrato.eu): created in order to guarantee home assistance to the elderly, disabled, and to people going through hard times. SAD also delivers its professionalism privately through Il Quadrato, offering a **new range of domestic social-assistance and health care services**, guidance and personalised services for the elderly, disabled, and people in need.

- **Assieme** (www.assiemecoop.it): created in 2015 thanks to the SAD experience within the field of social assistance. The cooperative offers



extremely personalised family care services. It doesn't offer a "standardized set of services", but individually designed solutions, which

place the individual and his/her specific needs at the heart of the action.

- Opening of the Mattarello Diurnal Centre in 2007, during the weekend, also extended to private users.

1.4 INSTITUTIONAL / GOVERNANCE STRUCTURE

The main body of the cooperative is the *Assemblea dei soci* (members'

assembly)ok. which elects the *Consiglio di Amministrazione* (the board) and the President (now Daniela Bottura).

Information registered December 31st 2014:

124 workers (60 members and 64 employees)

2 volunteer members

2 collaborators

SAD is endowed with a **Quality Management System**, and received the certification according to the UNI EN ISO 9001 regulation: Vision 2008 in 2003, for domestic assistance, and in 2006 for the Centro Diurno, for its management, design and provision of diurnal centres for the elderly.

In addition to this model, some guidelines have been introduced to define the implementation of the different processes. Each procedure indicates which steps must be followed, who is in charge, and which type of cost reporting (set of forms) has to be produced. In this way, each person perfectly knows his/her tasks and allows the monitoring of the whole procedure, as well as identifying possible improvements.

1.5 EXTERNAL RELATIONS

SAD operates in cooperation with both the **public** sector (Municipalities, Comunità di Valle, Azienda Provinciale per i Servizi Sanitari) and the **private sector**, integrating the welfare supply and demand with the design and provision of social services. SAD is also part of the Consortium of the Trentino social cooperation Con.Solida which currently groups together 60 social cooperatives based within the territory, providing services such as training, consultancy, and promotional support.

1.6 ECONOMIC DATA

	2010		2011		2012	
Revenues from public sector	2.907.412,40	94,20%	3.097.689,70	91,80%	3.301.794,79	95,06%
Revenues from private sector	120.600,37	3,91%	95.962,57	2,84%	77.933,86	2,24%
Expense-covering public funds	48.200,80	1,56%	176.276,45	5,22%	83.618,81	2,41%

Rents	0,00	0,00%	0,00	0,00%	2.520,00	0,07%
Other Revenues	10.238,90	0,33%	4.535,67	0,13%	7.401,66	0,21%
Total Revenue	3.086.452,47		3.374.464,39		3.473.269,12	

	2013		2014	
Revenues from public sector	3.186.960,52	92,67%	3.211.567,09	89,25%
Revenues from private sector	154.451,69	4,49%	233.602,41	6,49%
Expense-covering public funds	82.494,38	2,40%	96.721,59	2,69%
Rents	6.941,70	0,20%	42.073,00	1,17%
Other Revenues	8.339,02	0,24%	14.415,35	0,40%
Total revenue	3.439.187,31		3.598.379,44	

1.7 POLICY ENVIRONMENT

The areas of action in which social enterprises can operate are defined by article 2 of the 155/2006 legislative decree:

- social assistance
- social-health and care assistance
- training
- education
- environmental protection
- protection of cultural heritage
- university training
- after school education
- responsible tourism
- specific services for social enterprises provided by institutions made up of more than 70% social enterprise organisations

Moreover, organisations which, independently from their area of activity, promote initiatives aimed at integrating disabled and disadvantaged people (who must represent at least 30% of the staff) can also become social enterprises. In

In addition to this, the activity must not have a mutual aim as priority, i.e. it cannot be addressed exclusively to its members.

As long as specific social cooperative cases are concerned, (e.g. SAD), it must be underlined that a new political-economic scenario is currently taking shape. A period in which, in view of a **reduction of public resources** and of a **simultaneous increase in the number of social needs**, it is necessary to introduce innovative processes able to enhance the territory's resources and specificities. About 30 years ago, social cooperatives organised themselves to face the emerging needs of those times, such as physical disability, psychological disorders, social deviance, and drug addiction. Likewise, today's cooperatives must be able to listen to society in order to create a cultural and political function to actively contribute to the decision-making process of all those measures impacting the community, from housing to energy, from culture to the environment, from education to work.

Section 2: analysis of the case

2.1 IMPACT ANALYSIS

The services provided by SAD on the local territory according to specific areas of competence are active in:

- the municipality of Trento;
- the Comunità di valle Rotaliana-Konigsberg and the Comunità della Val di Cembra;
- the Comunità della Val di Non.

INDICATORS

The impact of the social cooperative on the territory is measured with different tools:

1. **ANNUAL SOCIAL ACCOUNTING:** it informs the stakeholders about the effects and repercussions of the cooperative's actions. It is designed to share the business choices and promote the active participation in the projects and the evaluation of the achievements. The first annual social accounting was published 9 years ago, in 2006.

2. **SERVICE CHARTER:** it provides clear and exhaustive information about the cooperative's services. The charter lists the goals, the methods, and the criteria according to which services are provided, as well as the control systems available to users and their families.



3. **BEHAVIOUR CHARTER:** defines the behaviours for each role and task, originating from the fundamental values which are at the core of SAD's social action: transparency, accuracy, responsibility, respect, and trust.

SOCIAL COHESION AND WORKER WELL-BEING

SAD supports policies aiming to combine family and work, in order to stimulate

the territory's capacity of connecting family policies with those addressing economic and cultural development. Since 2012 SAD has the Family Audit certificate, obtained after a three-year process, thanks to the numerous initiatives promoted by the cooperative to foster conciliation.

2.2. LOOKING TOWARDS THE FUTURE

Future development perspectives of the cooperative:

- expansion of the activity due to the large number of elderly users;
- enlargement and adjustment of the number and type of services offered;
- reduction of the profit margin (due to the decreased availability of public resources).

Strengths

- Readiness of the cooperative for enlarging the volume, number, and types of services, especially regarding:
 - logistics (headquarters, facilities, management..)
 - efficiency and structure (internal organisation and training)
 - planning (strategic development plan in the short, medium, and long term)
- Solid organisation, common and shared vision
- Innovation (testing innovative solutions)
- Budget solidity
- Ability to guarantee security and deliver quality service, whilst taking into account the economic concerns of users/families.

Weaknesses

- Uncertainty due to the mutability of the political/economic frameworks (law amendment, etc.)
- Partial dependence on decreasing public resources. However, it is important to underline that this weak point may also become a strong point, as the decrease in public resources encourages the research for

alternative solutions. Moreover, considering that the cooperative is willing to develop new types of intervention, this would allow it to detach itself from a set of limits imposed by the public authority.

Threats

- weak or non-selective recognition of the organisations that provide assistance and care services may contribute to the involvement of not qualified organisations. This would lead to a drop in the quality of the services offered, and consequently to a set of other problems.

Issues to address / opportunities

- to facilitate the person in identifying the most suitable solutions for his/her needs. More precisely, to determine the opportunities which may allow:
 - a longer stay at his/her place
 - different and appropriate solutions also in economic terms
- to facilitate the person and the family members/caregivers in the management of services (bureaucracy, administrative aspects, etc.)
- to combine family needs according to qualitative, security and economic perspectives

ADDITIONAL MATERIAL

Social Balance 2014 available here: <http://www.cooperativasad.it/wp-content/uploads/2015/06/Bilancio-Sociale-SAD-2014.pdf>

GLOSSARY

The types of care and personal services designed and managed in Trentino deserves a detailed explanation, as a simple translation risks to not fully represent them.

Services

**Appartamento
semiprotetto
(Semiprotected
apartment)**

Shelters for small family units with limited ability in living autonomously, or for people with psychological, relational or physical difficulties, who have concluded training to become self-sufficient but still need to live in places where they can find help and support. The daily life within the apartment is designed to increase self-sufficiency, facilitate social integration, and to give space to users' individual initiatives.

**Centro diurno per
adulti (Diurnal
Centre for Adults)**

At the centre, people with difficulties but with personal autonomy can carry out working activities such as assembling, whilst learning how to manage their own personal hygiene, how to keep the facility clean, and how to be in a group. The service, managed by professional operators and volunteers, is supervised in partnership with the services of the local authority aiming to promote social and working integration of the disadvantaged person.

**Laboratorio per lo
sviluppo di
prerequisiti lavorativi
(Laboratory for the
development of work-
related skills)**

At the laboratory, disadvantaged people attend training in order to acquire behaviours, motivation, responsibilities, and practical/manual skills, necessary for job placement. Users are integrated into a system which, albeit protected, reproduces the characteristics, the pace, and the rules of the workforce.

**Interventi educativi
domiciliari
(domestic educational
interventions)**

A set of domestic help interventions in situations considered cause for anxiety for the family unit or for the individual. Together with the educator, the user performs activities both within and outside the family framework, but also tasks aimed at developing or maintaining a personal autonomy. All this also has the goal of "relieving" the family or the

daily tutor of the disadvantaged person.

**Percorsi di
socializzazione in
contesto lavorativo**

**(Socialisation training
in a working
framework)**

The service addresses people with particularly serious conditions, who are not able to benefit from other existing services, offering them the possibility to spend part of the day in a company with a challenging, but non-regressive working environment. This is an effective tool for job guidance and sometimes for actual employment in the hosting company.

**Gruppo
Appartamento**

(Apartment Group)

Residential facilities which host people who, although completely or partially self-sufficient, need to live 24 hours a day in a protected environment. The aim is to empower these people in order to lead them to improve their social and relational conditions. In the apartment, the guests, with the help of expert operators, get used to autonomously managing their daily routine, the work and time, as well as the relationships with other people. As time goes by, some people may go to live on their own or in semi-protected apartments.

Local Institutions

**Cooperative sociali di
tipo "A" (Social
Cooperatives of type
"A")**

Offer educational, recreational, care and assistance services to the community.

**Cooperative sociali di
tipo "B" (Social
Cooperatives of type
"B")**

Create job opportunities for the weak or disadvantaged people, undertaking entrepreneurial activities within different sectors: agricultural, industrial, catering, etc.

Comunità di Valle

A separate office of the Autonomous Province of Trento. In the region there are 16 communities that can manage the majority of social and education services. On the contrary, health services depend primarily on the province.

Con.Solida.

Consortium of Trentino social cooperatives. The largest movement of social enterprises based in Trentino, made up of 60 social cooperatives (40 A type + 20 B type) and of 2 organisations which support development (Promocoop & Cooperfidi). It is part of the Federation of the Trentino Cooperatives and of the Consortium “Gino Mattarelli” (CGM), the national consortium of social cooperatives. Its areas of activity include the development of the community's well-being, of its members and of the cooperative culture, the creation/development of social enterprises, the organisation of training courses. Moreover, it provides political representation and facilitates contracting both with public and private organisations.

A.P.S.S. (Azienda Provinciale per i Servizi Sanitari)

Trentino's public agency for health and care services. It is organised in basic healthcare districts, departments and hospital units.

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