



SKIVRE Training Module 10:

ASPECTS OF SUSTAINABILITY

Organisation, financing and
value-adding elements

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In SKIVRE a team of 6 European institutions – all linked to religious heritage preservation - developed a training scheme for manufacturing and marketing of high-quality handcrafted products of European monasteries. The training contents at a glance:

SKIVRE Training Scheme
Module 1: Introduction Module
Module 2: Marketing Strategies
Module 3: Monastic Products
Module 4: How to Sell Monastic Products Authentically
Module 5: Distribution Channels
Module 6: Social Media and Communication
Module 7: Value Adding Through Networks
Module 8: Creating a Strong Brand
Module 9: Financing Strategies
Module 10: Aspects of Sustainability

You can find more information at the homepage: www.skivre.eu

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Content

About the module.....	1
Training description.....	1
Objectives of this training module.....	1
Target groups.....	2
Knowledge and skills gained after finishing this module.....	2
Training method.....	3
Unit 1. Basic elements of sustainability and continuity.....	7
1.1. Aspects of integration of product development and product sales.....	8
1.2. Organisational sustainability.....	10
1.3. Sustainability of personnel.....	11
1.4. Requirements for visitors in the New Media Age.....	11
Unit 2. Sustainable organisation of a monastery shop.....	13
2.1. Aspects of so called horizontal and vertical organisation.....	13
2.2. Type of monastery shops based on their organization.....	14
2.3. Aspects of the sustainability roadmap.....	19
Unit 3: Analysis and measurement of success in social media marketing.....	25
3.1. Choice of staff for the monastery shop.....	25
3.2. Choice of contractors and partners.....	26
3.3. Successful inclusion of volunteers.....	28
Unit 4. Financial sustainability.....	30
4.1. What do you have to finance?.....	30
4.2. Self-financing versus debt and equity financing-.....	31
4.3. Other options for financing.....	33
Good Practice.....	35
Exercises	
Exercise 10.1. - Barriers in the environment to overcome	
Exercise 10.2. - Check your knowledge about your customers	
Exercise 10.3. - The stakeholder involvement plan	
Exercise 10.4. - Business model canvas	
Exercise 10.5. - Barriers for achieving sustainability in product sales	



About the module

Training description

You have already learned a lot about the development and marketing of attractive monastic products in the previous modules. The focus there was on product development, market positioning, branding, communication and financing.

In this final Module 10, you will learn sustainable ways for producing and selling monastic products considering all the knowledge gained in the previous modules. What forms of organisations are best suited for co-operation? Moreover, how can they be financially secure?

This module is structured along the following main lines for learning content:

- Meaning and importance of sustainability and continuity;
- Road map towards sustainability and continuity;
- Organisational aspects of sustainability;
- Aspects of personnel and financial sustainability.

Most of the above will include exercises and good practice examples in order to deepen your knowledge.

Objectives of this training module

The main learning objectives of this module are:

- To make you familiar with aspects of the long-term sustainability of a monastic product sale
- To learn what kind of instruments and organisational forms might support you in the development of a successful monastery shop
- To understand which weighing you should use in order to find the right path to future-oriented implementation.

The specific objective of this training module is to draw the bottom line on lessons learned in all the other modules:

- the orientation towards target customers and customer groups,
- the establishment of value-adding partnerships, and

- the understanding and implementation of marketing strategies and the so-called elements of the marketing mix.

Module 10 will lead the decision makers in a monastery as well as people working operationally to produce and sell their products successfully and in a sustainable way.

This in turn will lead to generating a continuous revenue stream, so called self-financing impact, which contributes to preserving the monasteries as cultural heritage!

Target groups

This training module is designed to fit the training needs of the monks and nuns, management, staff and volunteers at European monasteries, no matter if they are run by Catholic or Protestant Orders or the Orthodox Church; by public or private operators.

All modules are relevant for these groups of people, but some have a more specific character. They are all interconnected, even if they are not formally complementary. They differ in terms of information and competence level and address three groups:

- **Target group 1:** For people working on the implementation level like those in monastery shops three modules are recommended: Module 1 as introduction to the training, Modules 3 and 4 about monastic products and authentic selling of monastic products. People who want to start considering certain strategic aspects may be inspired by Module 7 on adding value through networking.
- **Target group 2:** For people with a special knowledge or experiences or a certain background and/or specified tasks in the monastic management, Modules 2 on marketing strategies, Module 5 on distribution strategies, Module 8 on creating a strong brand, and Module 6 on social media and communication offer learning content and reflection.
- **Target group 3:** People on a strategy decision level with a highly specialized / experienced background and respective responsibilities in a monastery (Modules 9 on financing strategies and Module 10 on sustainability aspects).

Knowledge and skills gained after finishing this module

After studying this module, you will:

- Be aware what customers expect from the monastery shop
- Learn about different organizational forms available for running your shop
- Understand the importance of finding the best staff for your shop

- Familiarize yourself with the most important issues for financing your shop.

Training method

SKIVRE focuses on an interactive training approach, whether you use it as a self-learning course or instructed by a trainer. This training module includes:

- Individualized self-learning - a powerful learning method that enables each learner, on the basis of his/her own experience and knowledge, and on the basis of newly acquired knowledge, to reach development decisions on his/her own;
- Self-assessment - ongoing self-assessment tests or homework that learners send to their trainer prior to the commencement of each subsequent module;
- You might also work in small groups of 2 or 3, e.g. if you decide to implement this module with colleagues as a self-learning group in your monastery or supported by an external trainer.

You gain knowledge individually or in a group using:

- Training materials like this module;
- Training materials in nine more SKIVRE training modules which are closely linked to this module;
- The interactive SKIVRE online training platform: www.skivre.eu/training;
- Facilitated training sessions for learning in a group with a professional trainer.



Training content

Unit 1. Basic elements of sustainability and continuity

In general, sustainability means the capacity to continue, to stay diverse and productive for an indefinite term. It is often connected with development that “meets the needs of the present without compromising the ability of future generations to meet their own needs” as defined by the World Commission on Environment and Development in 1987. Many different factors influence the process of sustainability, which will be addressed in this unit as well as in the following units and subunits.



In terms of selling monastic products with continuity, or respectively operating a monastery shop sustainably, sustainability refers to the capacity of the product owner to continue his/her productive exploitation during a long-term period.

There are numerous factors that outline the performance and stability of products' sales – from its organizational embedding (e.g. addressing circumstances regarding the organization of a monastery shop as laid out in this Unit 1 as well as in Unit 2 “Sustainable organisation of a monastery shop”), through well-planned staff recruitment (as addressed in Unit 3 “Personnel sustainability aspects”), to the financial sustainability and financial self-sufficiency and solid client feasibility (as illustrated in Unit 4 “Financial sustainability” as well as in Module 9 “Financing Strategies” of this training scheme). In order for a monastic product owner to develop sustainably, the aspects mentioned below should be taken into consideration:

1.1. Aspects of integration of product development and product sales

In order to help the early development of a monastic product and its sales, and thereby, the economy of the monastery, **a monastery shop should be well integrated within the environment where it will operate.** This may sound self-evident, but is not always thought of although it is a crucial success factor.

There are several levels of accomplishing organisational aspects in terms of integration that should be noted:

■ Economic integration

A monastery shop's mission should be aligned with the current vision of the monastery owners, economic issues, challenges and potential of the monastery and its region. A thorough analysis of this basic situation is essential in order to recognize potential that can be targeted and developed, creating a competitive business environment, not only on local and national, but also on an international level. In this sense, the specific "monastery economies" with different levels of development also require different approaches, measures and instruments in the business development of monastic product sales processes.

With the slow shift from a governmentally or clerically controlled market to an open market, sales of monastic products in transitional economies serve as a tool to create economic values and to participate in the entrepreneurial society. Barriers that shape the entrepreneurial environment in transitional economies are:

- Lack of qualified personnel
- Small amount of investments or low investment potential
- Lack of business/entrepreneurship training
- Lack of partnerships with other monasteries or stakeholders
- Limited access to knowledge
- Administrative obstacles
- Small or no participation in networks.

■ Social integration

Product development and sales have to be recognized as tools that will help the development of the whole community and need strong support from the monastic governance and decision makers. The success of the product sales will not only benefit a handful of stakeholders involved, but will create job opportunities, encourage more people to visit the monastery,

create an economic impact through the integration of cultural and spiritual tourism, and may even reduce the brain drain from the region.

Another factor in the social integration of product development and sales is the recognition of this business activity itself and the cultural traditions of the region (for more details please refer to the Module 8 “Creating a Strong Brand”). Having a good knowledge and understanding of these factors will help immensely in the day-to-day relations with customers and partners and will help the smooth management of the whole operation.

Please do Exercise 1 “Barriers in the environment to overcome” at the end of this module.

■ Integration of customer expectation

Honestly, do you really know your customers? In all previous modules this has already been discussed several times and in numerous exercises you have already created a profile of your current and future customers. But you have to consider very precisely what this customer profile means for the organisation and the staff selection of your monastery shop. In this context, the following aspects should be integrated into your sustainability strategy:

- An **authentic ambience**: Your monastery shop should be positioned in the monastery itself, not separated on the monastery grounds or outside the monastery. It should be clearly identified as an integral part of the monastery;
- **Authentic sales staff**, who relate to monastic life: It would be nice if monks or nuns could take over the sales in the shop themselves. Their clothing will encourage customers to ask questions about monastic life, about the making of the products, about other offers from the monastery. But: Do not use staff in costumes, a monastery shop is not a fancy-dress party;
- **Product information**: How and where was it produced? Which ingredients were used and why? You can provide it as printed leaflets, QR codes, tags, “ask our staff”;
- A **motivational product presentation**, both in terms of the design of the product itself and the ambience in which it is sold;
- **Answers to questions that go beyond the product range**, e.g. about where the toilets are, is there barrier-free access, where is the children's playground, the next guided tour, about WLAN access, charging stations, catering and accommodation options, the nearest public transport connections, recommendations for visiting other interesting sites, hiking and cycling tours;
- Answers on the history and present life within the monastery;

- Information on the possibility of a spiritual conversation or meditation with a representative of the Order.

If you have answers to all these questions and these are available to all representatives of the staff in the monastery shop, you are well prepared for the needs and expectations of your customers.

Please carry out Exercise 2 “Check your knowledge about your customers” at the end of this module

1.2. Organisational sustainability

As crucial as it is for product sales to find a target market and its customers, it is also important to select specific types of sales channels and to be able to adapt to the changing business environments. With the fast-moving sales capability evolution from “in-house” monastery shops to online shops and to indirect sales channels (resellers, distributors etc.) the organization of product selling should be flexible and adapt its model to the new requirements of the market, which will ensure its continued existence. Therefore, the following Unit 2 “Sustainable organisation of a monastery shop” addresses all related issues specifically.

Moreover, as for any business, networking is extremely important for the effective functioning of a monastic sales business and its rapid development. The widespread use of networks extends the reach of the monastery and its products. These remote interactions with customers and business partners have significant benefits for the business, not only for the operations of the monastery, but also for its correspondingly positive overall recognition and impact.

In today's competitive market, the network is considered one of the most crucial resources in an organization, both in the private and public sectors. In most of the cases and especially in the beginning phase, the product development and setting up of sales activities has a very lean resource structure. The available staff have core competencies; however, they are in specific areas of expertise. Therefore, when expertise in other fields is required, the monastery stakeholders can use the advantages of building co-operations and partnerships. Therefore, there is a specific module (Module 7 “Value Adding Through Networks”) dealing with this important aspect.

1.3. Sustainability of personnel

The expertise and experience of the sales team and management team is crucial for the development of products and their sales channels. The professionals as well as the volunteers that operate this activity should not only have the ability to further the progress of individual product sales, but also of the sales activity as a whole. This implies very thorough business education along with experiences in all related matters and a very acute sense of recognizing the strengths and weaknesses of a business model for product sales. The team members involved should have a complex and broad knowledge and should also be committed to the mission of the monastery.

This is closely linked to the very often problem of lack of resources to hire qualified staff. In reality, it is very difficult to gather together a team of such well trained and experienced staff members. The quality of personnel is likely to grow with the number of successful sales activities and the growth of the sales programme and its role in the region. However, in order to accomplish this, an investment in qualified team members is needed prior to achieving growth and especially for the purpose of achieving growth. This in no way precludes the involvement of volunteers, but precisely formulated prerequisites and rules are needed in order to integrate them into an ambitious sales team (see Unit 3 “Personnel sustainability aspects”).

From this point of view it is important to seek partnerships and network connections with other already established entities or other forms of business development advisers.

Also, proper monitoring of the sales activities with weekly, monthly or quarterly reports on structured financial, marketing and administrative points can be extremely useful for the organisation of the products’ sales. Proper monitoring and reporting will gather relevant data for a clear overview of the state of the individual product sales and how the product or product line contributes to the overall sales progress and to the overall goals, which are aligned with product sales activities. This will also provide an opportunity to review the tools and measures used and revise or even change them with more appropriate ones that tackle certain problems and make the most of the strengths of the activity.

1.4. Requirements for visitors in the New Media Age

Several best practice studies have proved that the most successful and common form of building up product development and sales activities is a public-private partnership, in which initial support is granted by a local or central government body. These are especially the case, where the monastery is considered as a part of the “business environment” of the region and is expected to provide new opportunities for economic development, for instance through cultural and spiritual tourism and the promotion of cultural / religious heritage. A subsidy from

the government not only gives the needed initial resources, but also gives a crucial recognition by the government and in a way the monastery becomes part of the driving force of the country's socio-economy policy.

In order to justify public support, the product activity should clearly address the business development of the region in which the monastery will operate. The product sales should be designed in accordance with local and state government economic and innovation policies and should serve as a tool for the accomplishment of the goals set by these policies.

The initial funding is merely the beginning of a long development period. In order to establish itself as reliable and sustainable, the monastery management should look to diversify the sources of income. The product business of a monastery should be linked to the profit it makes in order to keep the whole operation of the organization sustainable. It is key towards successful future operations to set initial plans for the financial resources that the monastery will need to operate efficiently, but diversifying its income base might be a good tool to solve the funding problems it could face and to secure its survival.

Unit 4 "Financial sustainability" provides a general overview on funding sources. Module 9 "Financing Strategies" details it.

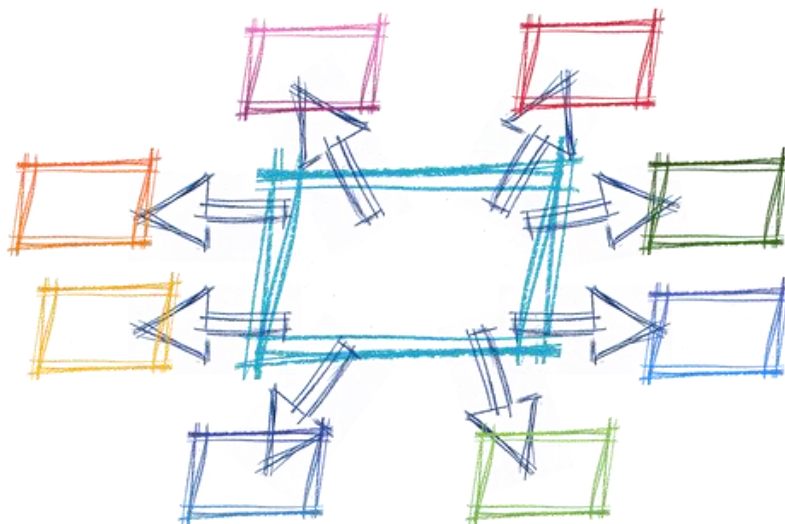
Tags for Unit 1:

Sustainability, monastic life, authenticity, economic integration, sales organisation, human resource management, public private partnerships, networking, financing

Unit 2. Sustainable organisation of a monastery shop

In this chapter we have to go a little bit into detail about business organisation. This concerns the organisation of your monastery shop. Strictly speaking, there are two primary forms of organization that we present to you here.

If you already run a monastery shop, the following information and considerations may no longer be relevant to you. However, please continue reading - you can review your decisions about running your monastery shop in this way or be inspired to consider an alternative form of organisation.



2.1. Aspects of so called horizontal and vertical organisation

Organizational structure refers to the way you organize the management and decision-making process of your monastery shop reaching your strategic goals. It is never easy to choose the proper structure and personalities, skills and talents of your staff.

Horizontal and vertical organizations are two of the most common types of organisational structures. Understanding the benefits and drawbacks of each can help you make the right decision for your shop.

■ Horizontal organizational structure

If your shop is all about tapping into the creativity and imagination of your staff and empowering them to do their jobs without micromanagement, then you may want to set up a **horizontal organizational structure**. In this structure, you grant employees the authority to make

decisions without having to obtain executive approval. A horizontal organization has few – if any – managers because the focus is on empowering the staff members and removing any barriers between the executive level and the staff level. Teamwork, collaboration and the exchange of ideas are the hallmarks of a horizontal organization.

■ Vertical organizational structure

An organisation with a large number of employees often chooses to run a **vertical organization**, which is typically structured like a pyramid with executives at the top, mid-level managers in the middle, and low-level managers and employees at the bottom. In vertical organizations, executives make all the major decisions and communicate those decisions to other staff. The executives develop methods to implement decisions and communicate these methods to the staff responsible for daily tasks. This top-down structure has a defined chain-of-command and strict protocols regarding how staff can make suggestions that reach the upper levels of your monastery.

For a monastery shop we recommend a vertical organization. The main benefit is that there are clearly defined roles and responsibilities, which might be important specifically if the monastery is run by an Order. The main drawback is that the roles sometimes get so set in stone they can hamper creativity and innovation. It is up to you to determine the size of your team and to find out about the strengths of your team members and to foster team spirit for encouraging problem solving and creative thinking.

2.2. Type of monastery shops based on their organization

■ A non-profit shop with own products

What makes an organization a non-profit has to do with purpose, ownership, and public support. Charitable non-profits typically have these elements:

- A mission that focuses on activities that benefit society and whose goal is not primarily for profit
- Public ownership where no person owns shares of the organisation or interests in its property
- Income that must never be distributed to any owners but recycled back into the non-profit organisation's public benefit mission and activities.

There are many types of non-profits ranging from your local credit union to the Chamber of Commerce in your city. Some non-profits depend on membership fees and sales of specific services or products.

Non-profits may have a workforce made up of both paid staff and volunteers. In fact, in many non-profits, volunteers outnumber paid employees. Nevertheless, charities must employ some professionals to work full or part-time to keep the place running. They typically have a professional leader, fundraising and marketing staff, business staff such as an accountant, and highly trained people to carry out programs, such as education, and services.

Non-profits may be exempt from many federal, state and local taxes.

■ A monastery shop as an enterprise for own products

A for-profit business seeks to generate income for its founders and employees. Profits, made by sales of products or services, measure the success of for-profit companies and those profits are shared with owners, employees, and shareholders. For-profit businesses can be either privately held or publicly traded. The latter sell stock and must abide by special rules to protect shareholders.

Have a look at our Italian Good practice 22 [“Products of Santa Maria Novella, Florence, Italy”](#), and understand how their shops are organized as an enterprise.

There is a good practice coming from Kremikovtsi Monastery "St. George the Victorious" in Bulgaria as well as Good practice 10 [“Kremikovtsi Monastery "St. George the Victorious" – Successful Sales with a Strong Brand”](#).

■ A monastery shop as a social enterprise for own products

Social enterprises combine societal goals with an entrepreneurial spirit. These organisations focus on achieving wider social, environmental or community objectives. A social enterprise's main objective is to have a social impact rather than make a profit for their owners or shareholders. It operates by providing goods and services for the market in an entrepreneurial and innovative fashion and uses its profits primarily to achieve social objectives. It is managed in an open and responsible manner and, in particular, involves employees, consumers and stakeholders affected by its commercial activities.

According to the European Commission the term 'social enterprise' is used to cover the following types of business:

- Those for whom the social or societal objective of the common good is the reason for the commercial activity, often in the form of a high level of social innovation
- Those whose profits are mainly reinvested to achieve this social objective

- Those where the method of organisation or the ownership system reflects the enterprise's mission, using democratic or participatory principles or focusing on social justice.

There is no single legal form for social enterprises. Many social enterprises operate in the form of social co-operatives, some are registered as private companies limited by guarantee, some are mutual, and a lot of them are non-profit-distributing organisations like provident societies, associations, voluntary organisations, charities or foundations.

Despite their diversity, social enterprises mainly operate in the following 4 fields:

- **Work integration** - training and integration of people with disabilities and unemployed people;
- **Personal social services** - health, well-being and medical care, professional training, education, health services, childcare services, services for elderly people, or aid for disadvantaged people;
- **Local development of disadvantaged areas** - social enterprises in remote rural areas, neighbourhood development/rehabilitation schemes in urban areas, development aid and development cooperation with third countries;
- **Other** - including recycling, environmental protection, sports, arts, culture or historical preservation, science, research and innovation, consumer protection and amateur sports.

There is a possibility your monastery shop might well fit into one of the above-mentioned types for a social enterprise.

Have a look how the [Bildhausen Monastery](#), a former Cistercian monastery, is managed according to the principles of a social enterprise, described in Good practice 1 "[Bildhausen Monastery, Germany](#)".

■ A monastery shop organized as an association

Associations are another type of social economy enterprise in Europe. Associations typically promote the trade or professional interests of their members. Organising your shop as an association might be a good way to include public and private stakeholders.

The main characteristics of associations that might fit into your shop concept:

- Voluntary and open membership;
- Equal voting rights - resolutions carried by majority;
- Membership fees - no capital contribution;
- Autonomy and independence;
- Service providers, voluntary work, and advocacy/representation.

Take a look at the Good practice 3 [“The International Trappist Association - International network to protect brand and values”](#) to gain more of an impression about this kind of organization.

■ A monastery shop as a cooperative

A co-operative is an autonomous association of persons united to meet common economic, social, and cultural goals. They achieve their objectives through a jointly-owned and democratically-controlled enterprise. Co-operatives have several defining characteristics:

- an open and voluntary association;
- a democratic structure with each member having one vote;
- an equitable and fair distribution of economic results according to the volume of operations made through the cooperative;
- co-operatives are enterprises that serve the needs of their members who contribute to their capital.

Co-operatives have become more relevant during the last years as a kind of rediscovery for the organisation of social tasks. In some European countries there have been legal changes in order to encourage co-operatives to be founded. Check what is offered in your country, your local Chamber of Commerce can advise you!

Look at Santa Caterina Nuns' Bakery from Palermo/Italy as a good practice for this type of organization. (Good practice 21 [“I segreti del chiostro - Monastic Products of Monastero Santa Caterina d'Alessandria Palermo, Italy”](#)).

■ A monastery shop with products from different monasteries

You might sell in your shop only products of your own making. But you might also consider including in your range of goods, products of other monasteries for complementing your own range. Many Orders already do that with products of other monasteries of their Order.

This means that you need a network of contributors to your range of products and in this case, you will regard our Module 7 “Value Adding Through Networks” as a valuable source of information. Agree with your network partners on a sales concept on

- Mutual acceptance of products
- Profit margins
- Acceptance or return guarantees within defined periods of time
- Type of presentation
- Joint promotional activities (e.g. a joint prospectus)
- Joint training of employees and volunteers.

Have a look how Bronnbach monastery in the Tauber valley region in Germany that offers the products of different producers and has also a cooperation with a retailer of monastic products. (Good practice 2 “[Bronnbach Monastery Shop, Germany](#)”).

2.3. Aspects of the sustainability roadmap

The sustainability roadmap for monastic products presents the main steps that have to be taken, which will help the product sales to endure and develop into value-adding services that contribute to better collaboration of the monastery with its stakeholders and society as a whole. It builds the horizontal organization.

The sustainability roadmap has five main steps: 1/ commitment, 2/ confirm the key product portfolio for future exploitation, 3/ confirm the benefits and the stakeholders, 4/ business model development, and 5/ value creation and improvement (Figure 1 below):

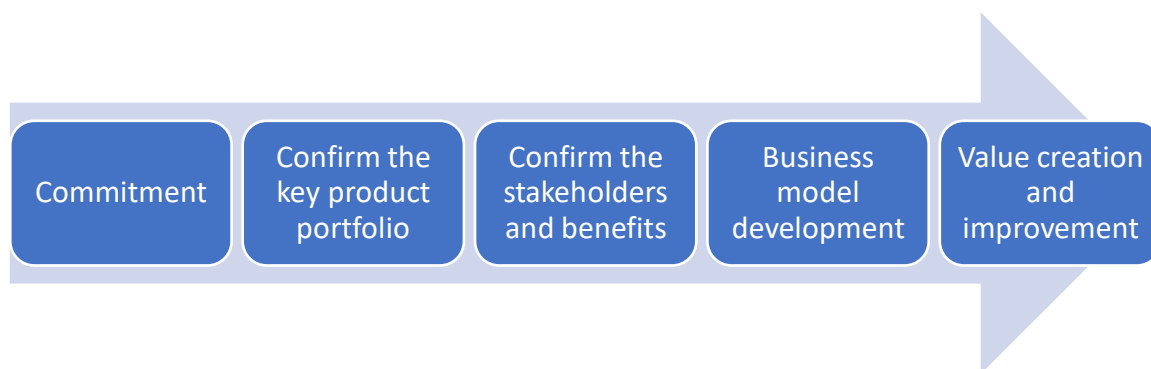


Figure 1. Horizontal sustainability roadmap

■ Step 1: Commitment

The sustainability roadmap starts with a commitment expressed by the main stakeholders involved from three directions: 1/ management commitment; 2/ staff commitment; 3/ commitment from interested partners to exploit and to continue the development of products.

Cleverly organised partnerships and access to strong networks are successful factors, as you already learned in Module 7 “Value Adding Through Networks”. In this unit it is now a question of how to set up these co-operations and networks sustainably for your monastery shop in order not only to build up a buyer community through continuity, but above all also to create trust for your monastery brand and your work (compare Module 8 „Creating a Strong Brand“).

Partnerships with producers will enable you to guarantee sustainable manufacturing of monastic products by achieving continuity in product design, product layout and by achieving quality assurance. In co-operating with local producers you might want to think about steering your product portfolio towards local or regional branding work (compare Module 8 „Creating a Strong Brand“), thus contributing to name and brand recognition.

Also, **partnerships with suppliers** contribute to achieving continuity in product design, product layout and product quality. Once you have established reliable partnerships with suppliers, tendering procedures might be simplified and related administrative effort might be reduced. In addition, partnerships with suppliers contribute to name and brand recognition.

With the involvement of experienced stakeholders and partners as resellers and distributors and under their guidance, the business and product delivery models can be further developed and enhanced.

If you have already completed your market analysis; your customer analysis; product portfolio decision by a value-generation chain analysis; a description of the market entry strategies with elements of the so-called marketing mix (compare Module 2 “Marketing Strategies”); then you might understand that it will be a good idea to also think about **partnerships with other monasteries and other value-adding partners** in your region. For instance, partnerships with monasteries can be established to share equipment for production and storage of food, for creating societies for collaborative purchasing of supplying goods and towards achieving collaborative sales efforts. This also supports achieving so-called “economies of scale” or “economies of scope”, and establishing brands (compare Module 8: “Creating a Strong Brand”), thus contributing to name and brand recognition.

■ Step 2: Confirm the key product portfolio

From the results of an internal survey and market analysis tasks (compare Unit 6: „How to sell monastic products authentically “), conducted in co-operation with the main partner identified, the product portfolio has to be confirmed as a next step towards sustainability. Once this is accomplished for one product group of the entire portfolio, it can be easily transferred to other product groups and/or product categories and is replicable for any kind of product portfolio decision activities (compare Module 3 “Monastic Products”).

There are already specific products on the market, which can be used as best practice examples in future product development and exploitation activities, or can be modified for individual re-use. Therefore, any decision made about the product portfolio can be updated and be re-confirmed as the product portfolio according to the sustainability needs of the monastery.

■ Step 3: Confirm the stakeholders and benefits

After the product portfolio is re-confirmed or updated in step 2 of the sustainability road map, the decision makers should pursue in steps 3 a strategy of step-by-step involvement of the stakeholders in the target groups to be addressed. This can be planned and established in a format as sketched in the table below:

Stakeholders	Description	Benefits
e.g. distribution and sales partners	The distribution and sales partners are early adopters of the monastic products and their main goal is generating profits with those products in their own sales efforts.	Application of innovative training practices and collaborative methods that will bring competitive advantage in the area.

Table 1. Stakeholder involvement planning

As the decisions on the key products for sustainable sales are already available, they will be ranked with respect to their relevance for specific stakeholders. The stakeholders as target audience will be addressed first through awareness raising and dissemination initiatives and finally, through provision of a complete set of sales and dissemination information that will contribute to ensuring sustainability.

Now is time to accomplish Exercise 3: The stakeholder involvement plan.

■ Step 4: Business model development

In this step, the Business Model Canvas (BMC) format will be explained as one possible business modelling tool for sustainable operation of product development and sales. It is selected, because it is useful for both organizations with existing and organisations with new product portfolios and it can be applied without huge effort and training needs (see Figure 2 below).

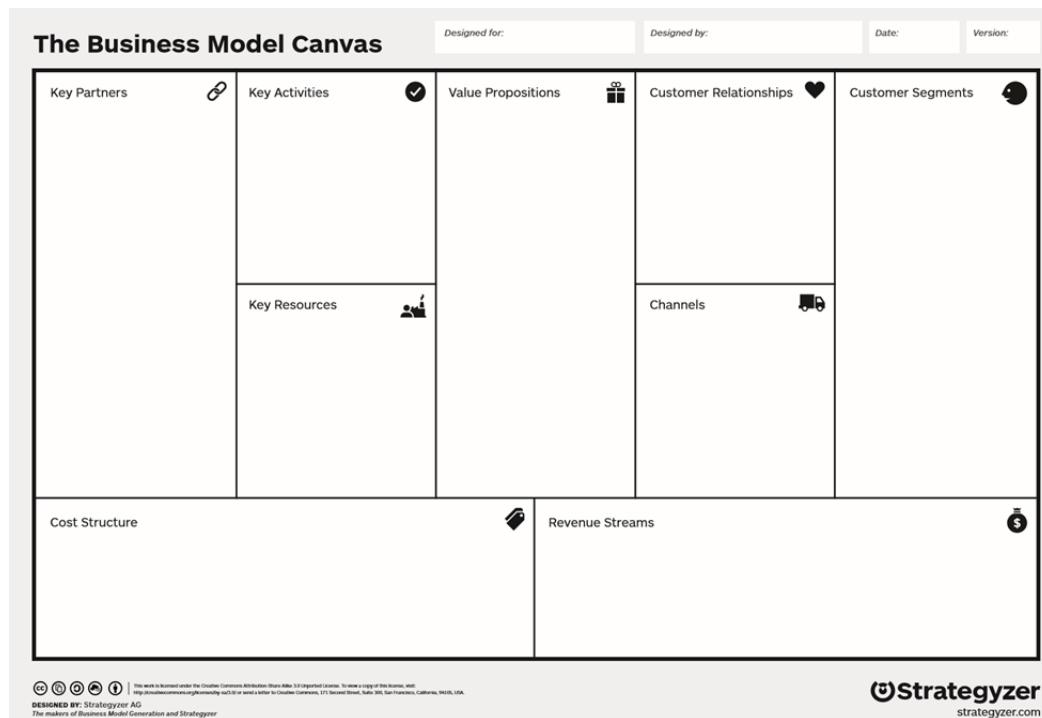


Figure 2: Business Model Canvas, Source: Strategyzer.com

Existing organizations can develop new initiatives and identify opportunities while becoming more efficient by illustrating potential trade-offs and aligning activities. New product businesses, on the other hand, can use it to plan and work out how to make their offering real. The usage of this canvas leads to insights about the type of the customers, value propositions, distribution channels, and financing.

Therefore, the business model canvas has nine elements:

- **Customer Segment**

In order to build an effective business model, a monastery must identify which customers it tries to serve. Various sets of customers can be segmented based on their different needs and attributes to ensure appropriate implementation of the product strategy, which would meet the characteristics of the selected customer groups. Key questions: Who are the customers? What do they think? See? Feel? Do?

You should check Exercise 1 of this module, as well as Exercise 1 in Module 8 “Creating a Strong Brand” and Exercise 2 in Module 6 “Social Media and Communication”.

■ Value Propositions

Value Propositions is the collection of products and services offered in order to meet the needs of its customers. Value propositions have a key role in communication and dissemination. They are the bases for constructing communication messages to the target groups. According to the target groups that have to be reached, different single value proposition elements can apply as a key message.

Check Exercise 4 in Module 6 “Social Media and Communication” for further inspiration on key messages.

■ Channels

Channels include entities you use to communicate the value proposition to the target segments, as well as entities through which future sales will be organized. Different delivery channels can be used but effective channels distribute the value proposition in ways that are fast, efficient and cost-effective. Each of the channel partners can reach their clients through their own channels, partner channels (as major distributors), or a combination of both.

■ Customer Relationships

To ensure the continuity and sustainability of the value-added products, the decision makers will identify the type of relationship they want to create with their customer segments.

■ Revenue Streams

The section will describe how the monastery will make income. What kind of revenues the monastery can generate depends on the type of value-added products they develop and sell.

■ Key Activities

These are crucial actions needed to make the rest of the business work. E.g., if selling through third parties is part of the model, then your activity around channel management is quite important. For a product-driven business, this probably includes ongoing learning about users and new techniques to build better products.

- Key Resources

Key resources are the strategic assets needed in place such as human, financial, intellectual and infrastructural resources.

- Key Partnerships

In order to optimize operations and reduce risks to a business model, monastic products' decision makers will cultivate buyer-supplier relationships so that they can focus on their core activities.

- Cost Structure

The cost structure describes the most important monetary consequences while operating under different business models. It should focus on a value-driven model by creating value for the users and customers ("willingness to pay").

Create your own business model in Exercise 4 at the end of this module. It is recommended to do that as a group exercise in order to involve as much knowledge and expertise as possible.

- Step 5: Value creation and improvement

The defined and confirmed product portfolio and sales activities can lead to new values added for the market and can create new values in the monastic sales processes. Therefore, in the long term, product innovation will be achieved as a most valuable result. The goal of this last step is to ensure that the products developed and offered are accessible to a wider range of customers and users. Possibilities for future value-added product development are recognized.

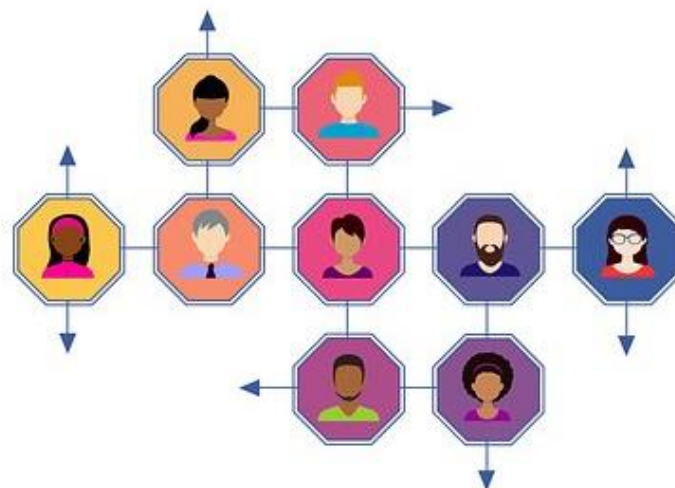
Take a look at Good practice 19 "[Route of Delights Wertheim, Germany](#)". Here you can recognize a clear added value by networking activities of single entities.

Tags for Unit 2:

Monastery shop, sustainability, business model canvas, value-adding partnerships, stakeholder analysis, sustainability road map, stakeholder benefits

Unit 3: Analysis and measurement of success in social media marketing

Every successful entrepreneur will confirm to you how immensely important good, satisfied and committed personnel is and that the selection of reliable suppliers is equally important. The same is with the inclusion of volunteers. What does this mean for you as the operator of a monastery shop? Which standards are decisive for your work? The following learning unit tries to help you with respective decisions.



3.1. Choice of staff for the monastery shop

The successful development of the activities of your monastery shop depends on the ability to hire and train people who work for you as employees or volunteers. You cannot be there all the time, therefore, there are several good-to-follow steps for you:

- **Hire people that share the values of the monastery.**

Every monastery maintains values that are a core part for all its activities. The employees and volunteers should also share those values because they are the representatives for the visitors to the monastery shop. They are the people that talk with the visitors, answer questions and promote the monastery. Therefore, be sure that from the very beginning the new staff members fit into the entire vision of your monastery. Let them learn about the monastery, its life and rules, about its history. Inspire them!

■ Describe what your staffing requirements will be.

In order to be sure that the employees and volunteers understand your expectations and their roles, describe them by days of the week, peak times throughout the day, and any seasonal peaks that may be relevant such as holidays. It is always a good idea to provide them in writing to your staff.

■ Guide and educate your employees regularly.

The regular and effective communication between the monks or nuns, responsible for the shop, and the employees is helpful in building quality in their work. Try to describe from the very beginning what your training process looks like. Have in mind that your staff members should know all products in the shop and be able to present openly their benefits to the customers. Therefore, they need to have good communication skills and positive and helpful attitudes in their work. Customers need to rely on their information and recommendations.

■ Be a great place to work and keep the best people.

Good employees and volunteers are precious for the entire success of the monastery shop. Therefore, be sure that along with all responsibilities they also receive awards for their good work. Involve them in the monastic life whenever it is possible.

Following all these recommendations, gradually, you will build an **authentic sales staff** which presents the monastery in the best way and will operate in the monastery shop, attracting more customers and growing the business activities.

3.2. Choice of contractors and partners

Decide if you want an independent contractor or employees in your monastery shop. Distinguishing between employees and independent contractors can impact your activities in production and in the monastery shop. An independent contractor operates under a separate agreement or distinct from the monastery and the monastery shop.

For example, there is the practice of having the monastery shop management carried out by an outside organization instead of having an in-house employee. In this case, monasteries outsource this activity to contractors – an organization or a person who manages the monastery shop and execute all necessary activities.

In other cases, the monastery outsources only certain activities connected with the monastery shop: human resource management, facilities management, supply chain management, accounting, customer support and service, marketing activities, brand design, research, content writing, engineering, diagnostic services, and legal documentation.

There are many reasons why a monastery may choose to outsource certain business functions to contractors outside of the monastery, including:

■ **Business activities reduction for the monastery**

Monasteries avoid carrying out business activities; they are not necessarily in harmony with their values and dedication. In some monasteries, special monks or nuns are the only ones that are connected with the outside world and are engaged with some business activities of the monastery shops. In other monasteries, monks are producing certain goods to satisfy their own needs and the remainder is sold in their shops. In many monasteries, monks and nuns avoid the word “sales” and even “production”.

On the other hand, financially sustainable monasteries are those who have their own production and sales, who work with retailers and who even have their own brands. Therefore, finding professionals as contractors for some or all business activities is very often a good decision creating a “win-win” situation.

■ **Access to more talent**

Contracting people from the local community gives the monastery access to talents which can contribute to the work of the monastery shop or to the production activity of the monks. Professionals in different areas, crafts people, small shops can be involved as contractors. In this case, the monastery provides good opportunities for increasing the employment and development of the local community.

■ **Time and cost saving**

Monks and nuns have different obligations in the monasteries and often do not have enough time for supervising the monastery shop, to think about marketing strategies or website development. At the same time, most of the monasteries are operating within tight budgets. Contracting people outside of the monastery to take care of activities, which are not inherently part of monastic spiritual life, saves time and even costs for the monasteries.

Recommendations about how to work contractors:

- Maintain close communication and good relationship with your contractors.
- Follow closely the quality of the work and its development.
- Be sure that the contractor shares your core values and views about the monastery shop and monastic production activity.
- Be sure the contractor has enough knowledge about the monastic products, and their benefits for the customers.

3.3. Successful inclusion of volunteers

The involvement of volunteers in your monastery shop depends first and foremost on your legal form: If your monastery shop is organised as an association or social enterprise, you will certainly be working with volunteers. Their commitment is an important contribution that deserves just as much appreciation as you would give to paid employees.

Working with volunteers can be a very valuable and satisfying part of your strategy, but it is different from working with employees. First of all, volunteers have very different motivations for getting involved in a monastery shop, which do not necessarily have to be synonymous with your strategy. The motivation and expectations of volunteers have changed in recent years. The classical motives "helping" and "sense of duty" are extended by the motives "creative will" and "self-design". The demands on voluntary activity have grown.

Volunteers of today mostly want to:

- Have fun and joy with their commitment.
- Do something meaningful for the community with their commitment.
- Bring their competencies into the engagement, assume responsibility, design tasks themselves, get involved and actively participate in the development of the monastery.
- Have opportunities for project-related and entertaining engagements.
- Not immediately want to give a lifelong commitment to the monastery.

Whoever works voluntarily, whoever volunteers (charitable) work, whoever gets involved in civic activities, takes on tasks, responsibilities and practical activities in the interest of the common good and recognised ideal purposes. Such activities do not constitute an employment relationship in the legal sense. Voluntary work is therefore not subject to the provisions of labour law (e.g. protection against dismissal). Voluntary work as a relatively freely agreed (verbally or in writing) contractual relationship arises predominantly from idealistic motives on the part of the volunteers and the "culture of recognition" of the monastery.

However, you should be aware of these:

- Volunteers are not necessarily professionals in the fields in which they are deployed, and co-operation requires tact and often more time for induction. Even if volunteers are not paid or only receive a small expense allowance, they still expect recognition and often understanding for special life situations.
- The basic prerequisite for successful co-operation is the precise definition of the volunteers' tasks and areas of competence. An exact job description protects both sides

from misunderstandings, from work stresses and strains, and counteracts a lack of clarity about one's own tasks. The job description may change over time. It is important that you discuss this with the volunteers and agree on changes together.

- For many volunteers, it is important that their volunteer work does not involve any costs for them. Make sure that any costs incurred (material, travel, postage, telephone, etc.) are covered by your monastery. In order to protect your monastery and the volunteers, please take out liability and accident insurance.

Recommendations about how to deal with volunteers:

- The management and staff of your monastery will make a basic decision to work with volunteers.
- They create structures for co-operation with volunteers and provide the necessary personnel, space and financial resources.
- Volunteers are given a task that suits them. Personal wishes, interests, knowledge and skills are to be taken into account.
- The placement is open to suggestions from volunteers in the context of their commitment.
- You have a clear idea of the task(s) for which you are looking for volunteers. Content and time are appropriate for a voluntary activity.
- There is a permanent contact person for volunteers in your monastery.

There are guidelines and information on volunteering in your country that provide organisational and legal information. Since these are different in the European countries, we can only refer to them here. And here, too, you should trust your networks and monastic associations, which have already gained experience in this field. An exchange of experiences among colleagues may bring more here than many Internet searches!

Tags:

Value chain, volunteers, personnel, understanding, commitment, consideration of competences,

Unit 4. Financial sustainability

There are many ways to finance your monastery shop - from self-financing to loans and public subsidies. You have learned about that in Module 9 “Financing Strategies” already. First determine your financing needs in this unit and then select the best type of financing.



Successful financing of product development and sales will hereinafter be referred to as Business Financing. It goes to the heart of modern-day profitability and sustainability management and enables all organizations and their stakeholders to pursue their operating goals continuously. Without such financial products as equity financing and debt financing, the global marketplace would experience reduced productivity, and monasteries would find it harder to fund their commercial product activities.

Anyhow, in order to grow your monastic business, you need access to sources of finance. Consequently, you have to understand the basics of internal financing, debt financing and equity financing, which will be briefly summarised in the following sub-chapters.

4.1. What do you have to finance?

In the global marketplace, the business finance debate often revolves around the best option one can use to fund activities. As you found in the units above, setting up a product portfolio, establishing sales channels and value-adding partnerships as well as building your product brand, the organisational brand or even contributing to local or regional brands requires significant resources. Those resources have to be funded. But external sources of financing —

sponsors, donators, lenders or investors — are often sceptical or reluctant, especially in the case of small businesses or new product developments. This can leave you to rely on internal sources of finance for investing in your business. Accordingly, please see the overview on business financing instruments below:

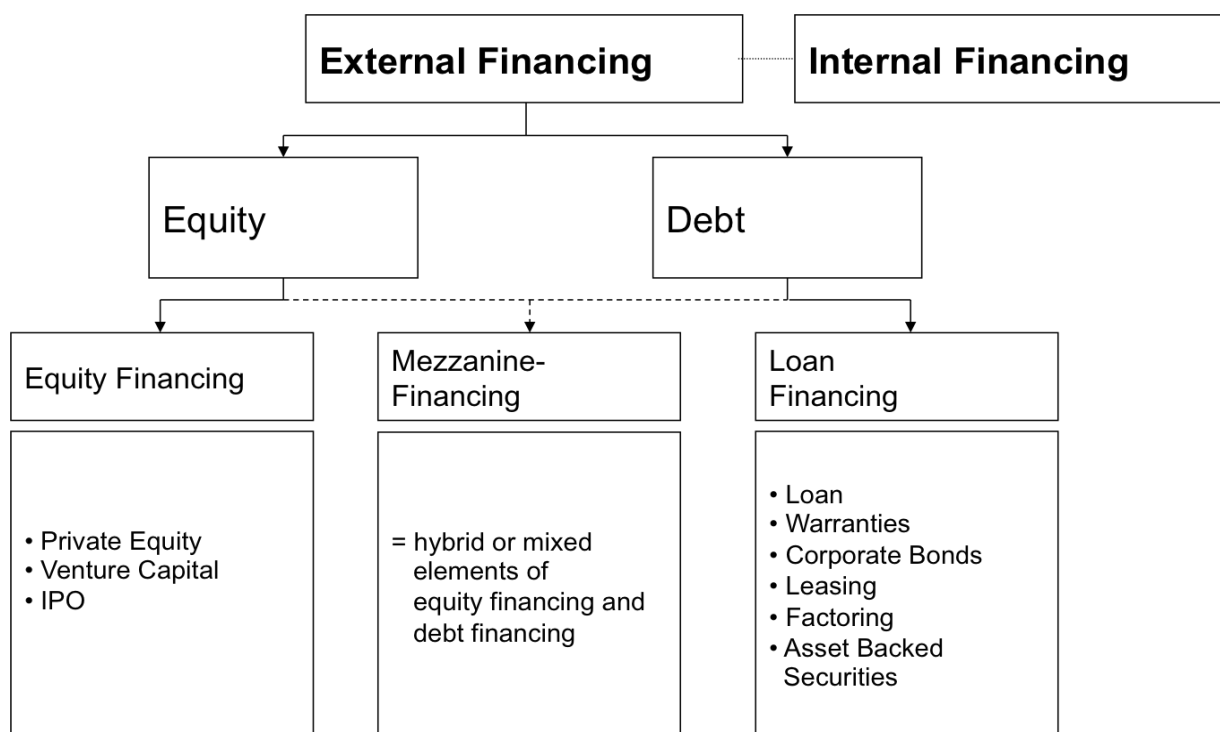


Figure 3: Overview on Business Financing Instruments

This overview above gives you an idea of possible business financing instruments. In the following chapters of the unit we will discuss these options as chances for your monastic business.

However, you should be aware that there are other financing instruments as well which might not be specifically business orientated but offer other financing opportunities. They will be shown in Unit 4.3.

4.2. Self-financing versus debt and equity financing-

When you use the mechanism of internal financing, you fund the development of new products with liquidity, so-called cash flow, which is already available within your organisation's assets: this may be personal savings or money available in your bank accounts or even money that may be available in a very short term through a so-called liquidation of assets. However, selling assets decreases the value of your monastery as a company and can trigger transaction costs, as well as taxes. Internal funding keeps all assets in the monastery and incurs no additional expenses beyond the cost of the project itself.

Applying these mechanisms of internal financing prevents you from paying interest to a bank or sharing ownership, profits and dividends with an equity investor. Using internal funding offers the advantage of keeping control in the hands of the monastery. You also do not have to go through an application process for public grants. Especially, in the cultural and spiritual sector, your monastery as a business may qualify for governmental grants under certain circumstances. However, the application process can be lengthy and expensive. The preparation of the grant documentation can be very time consuming and even cost consuming, especially if you have to hire and pay external expertise. You have to win the approval of the agency giving the grant, and this can involve many individuals and committees.

With **internal funding** available, you can start on your product development project immediately, with no approval required other than that of your management. In Module 9 “Financing Strategies” are some options for internal funding in Unit 1 of this module explained.

Debt financing is a strategy that involves borrowing money from a lender or investor with the understanding that the full amount will be repaid in within a specified future, usually with interest. In contrast, equity financing, in which investors receive partial ownership in a company in exchange for their funds, does not have to be repaid. In most cases, debt financing does not include any provision for ownership of the organisation (although some types of debt are convertible to stock). Instead, small organisations that employ debt financing accept a direct obligation to repay the funds within a certain period of time.

The interest rate charged on the borrowed funds reflects the level of risk that the lender undertakes by providing the money. For example, a lender might charge a start-up activity a higher interest rate than it would an organisation of public interest that had shown financial sustainability for several years. Since lenders are paid off before owners in the event of business liquidation, debt financing entails less risk than equity financing and thus usually commands a lower return.

In Module 9 “Financing Strategies “, you will find more detailed analysis of advantages and disadvantages of debt financing in Unit 2 of this module.

Equity financing is a strategy for obtaining capital that involves selling a partial interest in the organisation to investors. The equity, or ownership position, that investors receive in exchange for their funds usually takes the form of stock in the company. In contrast to debt financing, which includes loans and other forms of credit, equity financing does not involve a direct obligation to repay the funds. Instead, equity investors become part-owners and partners in the business, and thus are able to exercise some degree of control over how it is run.

Since creditors are usually paid before owners in the event of business failure, equity investors accept more risk than debt financiers do. As a result, they also expect to earn a higher return on their investment. However, because the only way for equity investors to recover their investment is to sell the stock at a higher value later, they are generally committed to furthering the long-term success and profitability of the company. In fact, many equity investors in start-up ventures and very young companies also provide managerial assistance to the organisation's owners and managers.

In Module 9 "Financing Strategies" you will find more detailed analysis of advantages and disadvantage of equity financing in Unit 3 of this module.

Tags:

Capital Structure, Internal Financing, External Financing, Debt Financing, Equity Financing, Business Financing, Financing Risks

4.3. Other options for financing

In Unit 4.1 and Unit 4.2, you learned about two ways of business-orientated financing of your monastery shop. These ways of financing offer long-term sustainability for the producers as well as for customers and finance providers. However, there are many other ways of financing: short-term opportunities, public funding, public-private partnerships, crowd funding, and donations. Many of them you will find described in detail in our training Module 9 "Financing Strategies" about financing opportunities.

As far as long-term financing is concerned, we recommend that you seek advice. There are an infinite number of financing instruments that should be carefully weighed up and adapted to your situation. You receive advice and support from the owner of your monastery, i.e. from your Order, from the public authorities and from private people who are interested in maintaining your monastery. If you have a circle of friends in your monastery, invite financing specialists such as bankers and tax advisors whose knowledge you can access.

You are also welcome to contact the partners of the SKIVRE consortium with your questions. All partners have years of experience in preserving the religious heritage and can thus arrange contacts and provide support.

Successful finalization of SKIVRE training modules

Let's end this training module with a few words to the learners: The training programme ends with this unit. The **SKIVRE** team congratulates you on having worked your way through the training units. We are sure that you will benefit from this in your future work. If you are of the same opinion, we would be pleased if you could recommend the training to your colleagues at your monastery or at other monasteries – thanks for being a multiplier!

If you have any suggestions or comments, we thank you for your feedback on www.skivre.eu or our Facebook page www.facebook.com/skivre .

The **SKIVRE** team regards these learning units as a contribution to the preservation of our European monasteries, which are part of our European Christian culture. We regard training as a core issue for their preservation and thank all participants in this training for their interest and dedication in reaching this goal.

Good Practice

There are several good practice examples referred to in this module:

- Good practice 2. Bronnbach Monastery Shop, Germany
Download link: <https://training.skivre.eu/gp.php/GP2-EN>
- Good practice 4. Manufactum – Good Things from Monasteries
Download link: <https://training.skivre.eu/gp.php/GP4-EN>
- Good practice 5. Tturnogorski Monastery – Authentic Monastic Products with a Strong Brand
Download link: <https://training.skivre.eu/gp.php/GP5-EN>
- Good practice 8. EUCOSMIA e-shop
Download link: <https://training.skivre.eu/gp.php/GP8-EN>
- Good practice 10. Kremikovtsi Monastery "St. George the Victorious" – Successful Sales with a Strong Brand
Download link: <https://training.skivre.eu/gp.php/GP10-EN>
- Good practice 19. Route of Delights Wertheim, Germany
Download link: <https://training.skivre.eu/gp.php/GP19-EN>
- Good practice 21. I segreti del chiostro - Monastic Products of Monastero Santa Caterina d'Alessandria Palermo / Italy
Download link: <https://training.skivre.eu/gp.php/GP21-EN>
- Good practice 22. Products of Santa Maria Novella, Florence/Italy
Download link: <https://training.skivre.eu/gp.php/GP22-EN>
- Good practice 26. Monastiriaka.gr
Download link: <https://training.skivre.eu/gp.php/GP26-EN>

Check your Knowledge

Exercises

Exercise 10.1. - Barriers in the environment to overcome

Please list the barriers that shape the environment in and around your monastery. Then, explain how you will overcome them.

Barrier	How to overcome

Exercise 10.2. - Check your knowledge about your customers










In all previous modules, you find numerous references to target groups and customers. Check the modules and their exercises again and reflect what you already know about your customers.


Exercise 10.3. - The stakeholder involvement plan

Please prepare a stakeholder involvement plan for two different products in your selected portfolio!


Exercise 10.4. - Business model canvas

Please prepare a business model canvas for two different products in your selected portfolio!

The Business Model Canvas					Designed for:	Designed by:	Date:	Version:
Key Partners 	Key Activities 	Value Propositions 	Customer Relationships 	Customer Segments 				
	Key Resources 		Channels 					
Cost Structure 			Revenue Streams 					


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DESIGNED BY: Strategyzer AG
 The makers of Business Model Generation and Strategyzer



 strategyzer.com

Exercise 10.5. - Barriers for achieving sustainability in product sales

Please list the barriers that shape the entrepreneurial environment in and around your monastery, and explain how you will overcome them! First, choose a monastic product and consider answers to the following questions:

1. Do you have financial limitations in the procurement of raw materials for the production of this monastery product? What are they?
2. Can you maintain the same price of the monastery product for a period of two or three years?
3. Does the price at which you sell the monastery product fully cover the costs incurred for production?
4. Can you maintain production regularly - for a season or for a certain period?

Please answer these questions about every monastic product you produce.

References

There is a wealth of literature and study material on the subject of "sustainability of business activities" though not linked to the preconditions in a monastery. Therefore, the authors of this module refrain from recommending referenced literature. The most important contents can be found in these 10 **SKIVRE** training modules, adapted to the situation and initial conditions of monasteries.

If you would like further information, we recommend that you talk to the experts in your Order, the regional chambers of industry and commerce or the economic experts of the municipality.

The **SKIVRE** team has chosen for all learners of the modules so called "good practices". They highlight good examples that the **SKIVRE** team regards as a valuable source for information. Do not hesitate to get in touch with them directly! They all have either a strong link to a monastery or know about the monastic situation and are happy to share their knowledge with you.

The SKIVRE Partnership: Empowering monasteries to harvest the potential of monastic products

SKIVRE is an Erasmus+ project aimed at empowering management, staff, monks, and nuns at monasteries with a most interactive training approach in gaining relevant skills for raising revenues for the preservation of religious heritage sites:

The **SKIVRE** homepage www.skivre.eu (including access to many social media tools) provides you with an inspiring multi lingual blog on monastic products, data and analyses, training material and training events in seven European countries.

The partnership comprises a multidisciplinary European team, which represents the target groups and expertise needed for training development:

media k GmbH | GERMANY (coordinator)

media k GmbH offers long-year expertise in religious heritage preservation and in the management of heritage preservation projects.

www.media-k.eu

Future for Religious Heritage | BELGIUM

Future for Religious Heritage is a non-faith organisation open to all. It brings together those working to protect religious heritage all over Europe.

www.frh-europe.org

GUNET | GREECE

GUNET is a Greek specialist in creating online learning platforms, which offer different kind of learning experiences adapted to different topics.

www.gunet.gr

INI-Novation Bulgaria OOD | BULGARIA

INI-Novation is an education provider specialised in generating economic effects from cultural heritage.

www.ini-novation.com

Bronnbach Monastery | GERMANY

Bronnbach monastery is a former Cistercian monastery now operated by a public authority in the German Tauber valley. The monastery started to develop monastic products based on the history of the site.

www.kloster-bronnbach.de

Wissenschaftsinitiative Niederösterreich | AUSTRIA

Wissenschaftsinititative is an education provider with longstanding experiences in developing learning platforms and learning material for heritage preservation.

www.wissenschaftsinitiative.at

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