# An Experiential Field Study in Social Entrepreneurship

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**Abstract.** Research has shown social entrepreneurs are less likely to abandon their efforts when they develop skills to operate in situations where both social and economic demands must be balanced. However, students may have difficulty grasping the process by which such skills are acquired. They may also have only a vague understanding of how these skills are applied during both the creation and operation of new social ventures. This paper presents a theoretical and practical approach to teaching new venture creation and stakeholder management vis-à-vis the specific actions and behaviors undertaken by social entrepreneurs. During a 10-day, experiential field study, students personally engage social entrepreneurs to understand how they manage the oft-conflicting demands of financial, organizational, community, and environmental stakeholders. The objective is for students to discover the process of new venture creation and management. The field study itself is a process of self-directed, interactive discovery whereby students develop and administer an interview protocol, observe an entrepreneur operating his or her venture, and write a case study addressing a particular challenge in the area of stakeholder management and social entrepreneurship. After reviewing the literature on education in social entrepreneurship and experiential learning, this paper describes how to implement the exercise. Learning outcomes from student interviews and the case study are discussed.

**Keywords**: experiential education, field study, social entrepreneurship, stakeholder management, entrepreneurial behavior.

## 1. Introduction

Entrepreneurship education is traditionally about opportunity seeking, learning to take calculated risks with limited resources and without a safety net, and the tenacity to see it all through (Kuratko 2005). These skills transcend organizational form and prepare students for work within organizations that are public or private, small or large, and business or non-business related. Entrepreneurship education, therefore, has widespread implications for management education as managers must also seek opportunities, take risks, and demonstrate resolve as they manage organizations.

However, some educators worry universities define entrepreneurial success too narrowly, thereby limiting the field's potential to improve students' skills

across curricula. By defining entrepreneurship only as a world of startups and venture capital rather than life enhancement, students who identify as designers, engineers, or artists may be less likely to take entrepreneurship courses (Torrance *et al.* 2013). This can lead to entrepreneurship programs populated largely by students without a sense for devising products or services that solve real problems for real people. In this paper, we argue entrepreneurship educators should aim for a broader definition of entrepreneurship extending beyond the pursuit of profits. We invite educators to develop courses encouraging students to pursue opportunities according to each studentís particular purpose, which may include serving a variety of stakeholders such as investors, customers, communities, employees, and the environment.

Social entrepreneurship education is on the rise at colleges and universities around the world. This mirrors interest in social entrepreneurship in society at large (Brock & Kim 2008, Moss & Gras 2012, Tracey & Phillips 2007). Much of the pedagogical focus is on how emerging social entrepreneurs can develop skills to operate in situations where social and economic demands have to be balanced simultaneously (Kickul, Terjesen, Bacq, & Griffiths 2012, Pache & Chowdhury 2012, Smith, Besharov, Wessels, & Chertok 2012). While this skillset is critical to the social entrepreneur's success and merits a central place in entrepreneurship pedagogy, relatively little attention has been paid to how students with limited social entrepreneurship experience might be inducted into the field. Prior pedagogical work has addressed this by proposing course assignments combining social interactions in a business setting with decision-making models balancing ethics of the employee, customer, environment, and community (Fernando 2011). Other studies have proposed interactive, research-driven assessments of the social dimensions of a business (Rendtorff 2015).

The present study extends prior work on balancing the needs of various stakeholders by proposing an experiential field study in the context of venture creation and opportunity identification. Social entrepreneurship pedagogy can be greatly enhanced by having students identify and personally engage with social entrepreneurs. This provides an opportunity to develop a foundation for deeper engagement with the field. The proposed approach combines advances in social entrepreneurship education with developments in experiential education (Kayes 2002, Kolb & Kolb 2005, Vince 1998). It also adopts a student-centered, constructivist learning approach to teach an entrepreneurial mindset as a means for developing awareness of the skillset employed by successful social entrepreneurs (Krueger 2009). As such, the exercise culminates in a written case study focusing on issues related to the process of creating and operating new social ventures. Students present a puzzle which, in essence, allows the reader to experience the same process of investigation and discovery. This means students must reflect on their own learning process and present their own journey and findings in an instructive and compelling way. Further, our approach differs from the study of other forms of entrepreneurship (Gundlach & Zivnuska 2010,

Rendtorff 2015) in that students learn how social entrepreneurs navigate opposing social and economic institutional logics. They learn this through the study of the actions entrepreneurs take to meet varying stakeholder needs.

This exercise offers students a learning opportunity that not only enhances their awareness of the social side of business, but also helps them to develop skills which can be applied in range of managerial and leadership roles outside of the classroom. Additionally, by personally interacting with social entrepreneurs that act to increase collective wellbeing, students are exposed to models of doing business to help them overcome preconceptions of profit as the moral purpose of venture creation (Michaelson 2009, Hockerts 2015). Finally, data collection for the written case assignment is student-centered. Students co-create course content, conduct field interviews and observe social entrepreneurs in action before writing a case study addressing (1) real issues a social entrepreneur is facing, and (2) the process by which these issues are being resolved. The next section describes the theoretical foundations of the exercise before providing instructions for its implementation. Learning outcomes and suggestions for further pedagogical research are discussed at the end of this article.

## 2. Theoretical Background

The two key elements of the exercise, conducting fieldwork and writing a case study, are grounded in the student-led design and application of an interview protocol used to gather information from social entrepreneurs. The interview questions address the opportunity pursued by the social entrepreneur, the process by which he or she identified it, how the opportunity was transformed it into a business, and how social and economic demands were balanced throughout the process. Asking the right questions is critical as the information collected provides the data that students will later analyze to write their case studies. Instructors must therefore help students understand and apply the theories underlying entrepreneurial behavior (Gartner 1988) and stakeholder management (Donaldson & Preston 1995). In addition, it is important instructors understand the role of experiential learning in this process, as student discovery and understanding will stem from engagement with social entrepreneurs in the field setting.

### 2.1. Entrepreneurial Behavior: Social Entrepreneurship as Action

Entrepreneurial behavior entails the actions and motivations of individuals in the process of creating a new venture. The goal of researching these behaviors is to help entrepreneurs make decisions resulting in positive outcomes for firm stakeholders (Bird & Schjoedt 2009). Research into entrepreneurial behavior is

beneficial to students because it reinforces that, at the end of the day, entrepreneurs *perform actions to create new firms*.

This is a key definition of entrepreneurship and acts as a foundational assumption for other research streams in the field. For much of the history of entrepreneurship research, scholars were concerned with what differentiates entrepreneurs from managers and the general population. The field eventually shifted from psychological explanations to a focus on action. A baseball metaphor illustrates the importance that this shift had on entrepreneurship theory and practice. Very little practical information can be gleaned by asking how baseball players think differently from others. Baseball players play baseball, and they have developed a set of skills and abilities to do so (Gartner 1988). By analogy, more insight into the phenomenon of social entrepreneurship can be gained by studying the actions social entrepreneurs take to start new ventures.

This epistemological shift from psychology to action informs the interview and fieldwork portion of the experiential exercise. Although cognition is important for understanding motivations in social entrepreneurship, it is individual and group behaviors which result in the creation of an organization, as well as the strategies and structures necessary to achieve organizational goals (Gartner, Carter, & Reynolds 2010, Chowdhury 2016). Furthermore, social entrepreneurs' ethical principles are manifested through their actions, and through these actions stakeholders judge their integrity. In this sense, social entrepreneurs have to sell their ideas. Managers, employees, customers, suppliers, and communities want reassurance that the business is operated in an ethical fashion (Gordon 2007).


## 2.2.  Stakeholder Management: Balancing Social and Economic Demands

A number of scholars discuss how teaching social entrepreneurship to university students poses a particular set of challenges not met by traditional management education methods. Traditional methods tend to focus on the profit-maximizing objectives of companies (Collins & Kearins 2010, Rusinko 2010, Shrivastava 2010). Such purely economic conceptions of a firmís responsibilities tend to focus on the fiduciary duties of the firm and its managers towards shareholders to the exclusion of its responsibilities to other important constituent groups (Friedman 1970). In contrast, social conceptions of firm behavior tend to emphasize pressures for firms to meet the needs and interests of various firm stakeholders in addition to shareholders such as employees, suppliers, customers, and the community at large (Hannan & Freeman 1984). This stakeholder conception has been one of the most influential theories used to broaden our understanding of the firm as a purely economic entity to one that is socially embedded, with exchanges and responsibility towards a wide range of constituents. As noted by Donaldson and Preston (1995), stakeholder theory has descriptive, normative, and instrumental components. Whereas descriptive stakeholder theory relates to work

that seeks to explain the behavior of firms and describes the characteristics their management, the normative version considers managers responsible and accountable towards all stakeholders, rather than shareholders only as a purely normative expectation. In this sense, the normative version has the function of providing moral guidelines for the operation and management of corporations. Instrumental stakeholder theory claims that attending to the concerns and wellbeing of all stakeholders is in the best commercial interests of a company. Consequently, the demand for responsible behavior towards stakeholders also serves as a business imperative: "doing ìgood" for employees, suppliers, the broader community, and other stakeholders leads to doing well, financially, for the company.

The present study combines a descriptive and normative approach to better understand firm and managerial behavior, and how firms are managed in terms of a social entrepreneur trying to balance the various stakeholder groups that he or she has to deal with, including, but not limited to, financial stakeholders (e.g., investors and banks); internal stakeholders (e.g., employees); product market stakeholders (e.g., customers and the broader communities within which they are situated); and the environment. Ultimately, students should understand both the actions social entrepreneurs undertake, and the philosophical guidelines social entrepreneurs create for themselves (or have borrowed from elsewhere, or were taught) for operating their social ventures. In this sense, the field study, interviews, and case writing components are complimentary elements of the exercise. Each requires students to develop an understanding of what a social ventureís stakeholder groups are and how they are constituted (Barnett 2007). In addition, by asking social entrepreneurs about how they balance the competing demands of each group, students begin to conceptualize how they might perform these actions themselves in the future. Finally, when students are able to identify stakeholder conflict, an inevitability when conflicting logics are at play (Pache & Santos 2013), they will be well-positioned to ask the social entrepreneur they are working with to tell a story about how he or she has attempted or will attempt to resolve the issue. This constitutes a valuable source of learning for studentsí future careers, whether they choose to enter the social enterprise sector or not.

2.3.   Experiential Learning: Entrepreneurial Mindset and Creating Expert Entrepreneurs

The third theoretical framework underlying the field study experience is the experiential learning cycle. This framework assumes learning occurs during the interplay between the acquisition and transformation of knowledge (Kayes 2002, Kolb 1984). As it relates to the exercise presented in this paper, experiential learning focuses on student-centered discovery and personal involvement with social entrepreneurs in the field. The outcomes from the process are unique to

each student and emerge from the concrete experience of interviewing and observing social entrepreneurs.

A number of scholars have expounded the importance of applying experiential learning to entrepreneurship pedagogy. It allows instructors to simulate processes in which entrepreneurs learn (e.g., venture creation) and it creates opportunities for experiencing the feelings and actions entrepreneurs themselves experience (Pittaway & Cope 2007). This is especially important for social entrepreneurship pedagogy, as many social entrepreneurs are deeply passionate about their work. Experiential learning exposes students to this passion and may help them develop it for themselves (Gundlach & Zivnuska 2010).

More broadly, the goal of entrepreneurship pedagogy is to develop more individuals with an entrepreneurial mindset, and this means taking beginner entrepreneurs and teaching them to think like experts (Krueger 2009). As Krueger points out, even though experts know certain facts and have adopted certain skills, what truly differentiates them is how they structure their knowledge. One way to get students to develop an expert, entrepreneurial mindset is to have them design and implement real-world projects involving data collection, analysis, and the creation of a final productóall the while having to confront challenges and situations that entrepreneurs face themselves (Krueger 2009).

To this end, this study incorporates theory on entrepreneurial behavior and stakeholder management to develop a field study exercise on social entrepreneurs. The objective is to provide students real-time access to social entrepreneurs to discover the thoughts and actions that underlie the difficult task of balancing social and economic demands while operating a social venture.

## 3.  Preparation and Overview of the Exercise

In order to prepare students to write and administer the interview protocols, observe social entrepreneurs in the field, and write their case studies, it is helpful to introduce students to the core concepts outlined above through assigned readings and instructor lectures. This lays the foundation for the class sessions on social entrepreneurship, entrepreneurial behavior, and stakeholder management.

Figure 1 depicts how the field study is structured according to the experiential learning cycle. This is the overarching pedagogical framework used to develop the project. Students begin the cycle through abstract conceptualization of core concepts and data collection methods (Step 1). They then move to active experimentation with the interview protocols and field observation (Step 2). After reviewing results from the trial data collection period and revising the interviews, students begin the field study itself (Step 3). Finally, students reflect on the process and the data they collected by writing the final case study (Step 4).

*Figure 1:* Social Entrepreneurship Field Study and the Experiential Learning Cycle (adapted from Kolb & Kolb 2005)
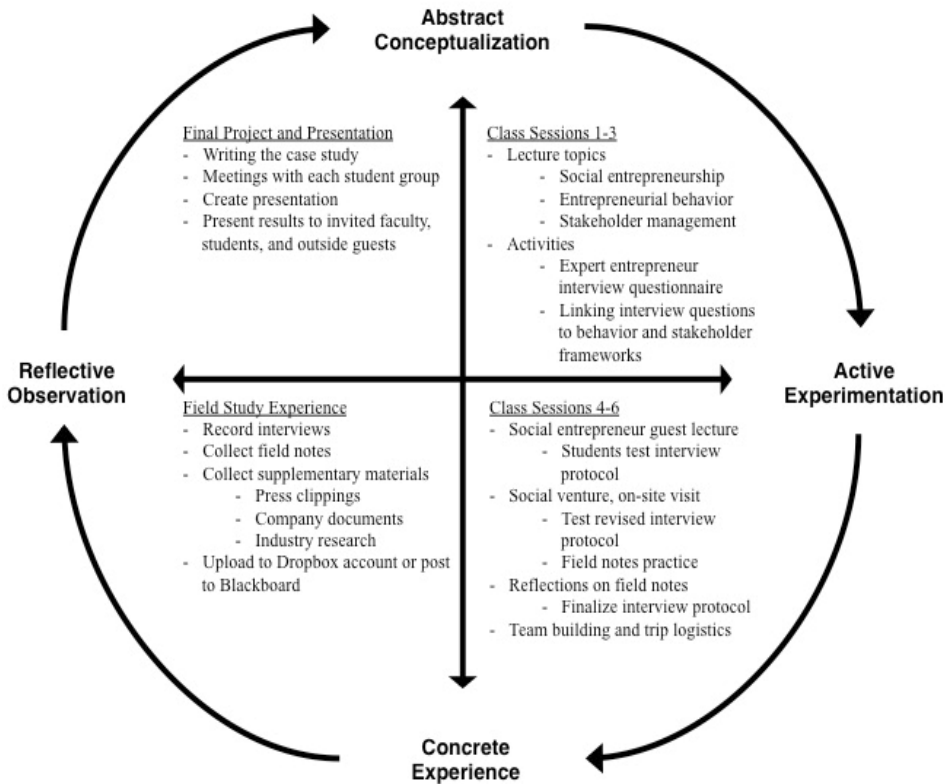


    The exercise described in this paper involves a group of 24 undergraduate students from a university in the Untied States. The students, along with two faculty members, traveled to Brazil in the spring of 2015 as part of an international field study course. It is important to note that while the exercise was conducted as part of a study abroad course, it is easily implemented in a local setting. In fact, running the program locally may be preferable given the added logistics involved in organizing a study abroad course.[1] The focus here is not on the setting (i.e., local vs. international) but rather on using the experiential learning cycle to develop an interactive exercise where students can develop first-hand knowledge of the entrepreneurial process and social entrepreneurs' methods of stakeholder management.

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1.  Perhaps the greatest difference in conducting this field study internationally versus locally is the financial element. At our institution, students sign up for the field study as a regularly scheduled, 3-credit elective. Students pay an additional $3,500 which covers airfare, lodging, and two, formal dinners in Brazil.

Appendix A depicts a short list of additional materials we provided to students.

## Step 1: Abstract Conceptualization

This course takes place in the spring semester; with the field study itself occurring during spring break over a nine-day period. Prior to actual fieldwork there are six, three-hour course meetings scheduled. These weekly sessions serve to develop content knowledge through readings and lectures. Students are required to compose written reflections on core concepts. In addition, they conduct exploratory research on the entrepreneurs they later interview in the field.

**Pre-planning.** The instructors identified six social entrepreneurs willing to participate in the exercise. Each entrepreneur made the following time commitments: one 30-minute briefing with the instructors (via phone or Skype); one 60-90 minute interactive lecture / question and answer session with students; and one 60-90 minute field interview with a group of up to four students. The entrepreneurs also agreed to allow the smaller group of students to observe their business operations. These observation sessions ranged from a few hours to half-a-day in length.

**Class Session 1: Social Entrepreneurship.** In the first class meeting, instructors provide details on the context of the field study (i.e., locations, trip logistics, learning objectives, student testimony from prior trips if available, and the social entrepreneurs to be interviewed). Students will likely have many questions and class time should be structured to allow for this.

The first core concept introduced is social entrepreneurship. The lecture is based on readings that highlight the definition provided by Santos (2012), which states the social entrepreneur works to develop and implement sustainable solutions to neglected problems with positive externalities. Instructors modified this definition by adding that the social entrepreneur takes specific actions to simultaneously maximize and balance the demands of multiple stakeholders in the pursuit of developing these solutions.

Instructors also provide students with the list of social entrepreneurs who agreed to participate in the field study. In this example class of 24 students, instructors made arrangements with six social entrepreneurs and assigned one to each group of four students. The homework assignment in this session should consist of a short writing assignment of 1-2 pages asking students to research their assigned social entrepreneur and link concepts from the lecture on social entrepreneurship.

**Class Session 2: Entrepreneurial Action.** An underlying premise of this field study exercise is that entrepreneurs *act* to create new ventures (Gartner 1988). As

such, the second core conceptualization is entrepreneurial behavior in the context of both creating and managing new ventures. As a starting point, instructors draw on an "expert entrepreneur interview" assignment developed by Gartner (2006). The purpose of the interview is to explore, in detail, how an entrepreneur accomplishes three tasks: opportunity recognition, opportunity feasibility (am I able to pursue this?), and development of the opportunity into a business. According to Gartner (2006), "Talking to the founder of a business provides students with a level of detail about the process of entrepreneurship that can be discerned in no other way."

The following questions serve as a starting point for students' development of what will eventually become the final interview protocol combining concepts from social entrepreneurship, entrepreneurial action, and stakeholder management. These initial questions draw on three principals of educating entrepreneurial leaders' cognitive ambidexterity (i.e., creating through action and experimentation); navigation of social, environmental, and economic value creation; and self and social awareness (McKone-Sweet, Greenberg, & Wilson 2011):

1. Describe the opportunity that the entrepreneur decided to pursue, his or her background, and the process used to evaluate the opportunity— What is the opportunity? What influenced the entrepreneur to identify and pursue the opportunity? How did the entrepreneur evaluate the opportunity? What criteria did the entrepreneur use to determine whether to pursue the opportunity? What were the perceived risks of this opportunity and how did the entrepreneur expect to manage them?

2. What did the entrepreneur do to turn the opportunity into a business? Identify specific activities the entrepreneur undertook to develop the opportunity into a business. Identify when the entrepreneur did these activities (Provide dates: month and year). Identify important contacts and individuals who were helpful during the startup process. What major problems were encountered along the way? How were these problems solved?

3. Have the entrepreneur talk about how he or she interacts with and balances demands from different groups that have a stake in the venture. For example: investors; the community; customers; employees; and the environment may have conflicting demands. Can he/she give examples of this? Has he/she tried creating synergies among these groups?

4. What advice would the entrepreneur give to someone thinking about pursuing an opportunity?

5. Why was this entrepreneur successful at starting this business? Provide an analysis of how the factors identified in (1), (2), (3), + (4) affected this entrepreneurís success.

In class, instructors work with each student group to develop an interview protocol specific to each social entrepreneur, based on what they discovered about the entrepreneur assigned to them in the previous class. Homework for this class session should include a draft of the interview protocol tailored to their assigned social entrepreneur.

**Class Session 3: Linking Social Entrepreneurship and Action: Stakeholder Management.** In this session, students link the core concepts of social entrepreneurship and entrepreneurial behavior with the process of operating a social venture. Instructors present the stakeholder managerial framework as a means of understanding and interpreting the behaviors of social entrepreneurs, focusing on the descriptive and normative versions of this theory as discussed above (Donaldson & Preston 1995). Descriptive stakeholder theory explains how firms are managed in terms of the social entrepreneur trying to balance the various groups (i.e., financial stakeholders, internal stakeholders, product market stakeholders, and the environment). With a normative perspective, instructors help students access the behavioral guidelines that social entrepreneurs have created for themselves or were otherwise taught for operating their social ventures.

The key to this session is to take the existing draft of the interview protocol and to specify further questions that need to be addressed when dealing with social entrepreneurs. Questions should inquire about specific behaviors undertaken by the entrepreneur related to each stakeholder group. It is also important that a timeline of these actions be developed, so students should ask when the social entrepreneur enacted these behaviors (e.g., during the startupís gestation, or after it was up-and-running). Specific names of individuals and companies within each stakeholder group should be provided where possible. For example, a group of students might be interested in ascertaining how a social entrepreneur who provides computers and internet access to rural communities might distribute and install the necessary equipment for their operations. In this case, questions would be developed that address which stakeholders were involved in this process, whether there were challenges in balancing conflicting demands, and how these challenges were met.

At this point instructors ask that students further refine the first draft of their interview protocol as homework for the next class. They should link entrepreneurial behavior and stakeholder management to questions about the launch and operation of the venture. Students should address only two or three possible issues to keep the interview focused. If possible, different groups should develop questions in different stakeholder group categories.

**Step 2: Active Experimentation: On-Site Visit with Local Social Entrepreneur**

This phase encompasses class sessions 4, 5, and 6 of the pre-trip preparation. Students should now be familiar with core conceptualizations in the course, and they should have a working draft of the interview protocol. Now, they begin active experimentation where they conduct a sample interview and observe a social entrepreneur in action.

**Supplementary research.** Using university databases, students collect a variety of data including articles from academic and business journals, newspapers, and industry reports. Students also find and report information from websites and videos about their assigned social entrepreneur. This can be assigned as homework after class session 3, or as part of class session 4, below.

**Class Session 4: Social Entrepreneur Guest Lecture and On-Site Visit.** The instructors have previously arranged an interview and site visit with a local, social entrepreneur who produces and bottles a popular Brazilian beverage. Students spent the day listening to a presentation on how he started his business, and they toured the facilities.

Prior to the site visit, instructors advised this entrepreneur to first speak freely about his background, how he started, and his core philosophy as it relates to his work. This is similar to the initial, open-ended questioning that precedes field interviews. During the actual site visit, students asked questions from the interview protocol while the instructor made an audio recording of the interaction. Students took notes of their own during the presentation, and made field notes during a tour of the facilities. Students were instructed to take notes on employee behaviors and interactions, processes, and any other information that stood out to them. The instructorís recording, and all notes were uploaded to Dropbox so all students could have access.

**Class Session 5: Reflection on, and Modification of, Interview Protocol.** In this class students reflect on the site visit, the interview questions, and the field notes. They discuss which questions work, which do not, and why. Students then compare the notes that were uploaded to Dropbox. Everyone discusses what types of notes and observations should be taken and why. Finally, the interview protocol is refined into what will be the final version administered during the field study.

**Class Session 6: Team Building and Trip Logistics.** The focus of this class is team building, as well as reminders of trip logistics. In this example class, instructors arranged for a dinner at a local restaurant. In this informal setting, students and faculty discussed the upcoming trip and what we hoped to learn.

**Step 3: Concrete Experience: Observing Social Entrepreneurs in Action**

The class visited each of the social entrepreneurs to learn about their mission, values, governance, organizational structure, funding plans and operations. Students observed each site and the daily operations of the social ventures. First, the social entrepreneur gave a presentation followed by open-ended questions from the class. Following the tour of the organization, the student team assigned to that particular social entrepreneur engaged in one-on-one discussions and in-depth interviews. They also recorded videos to be incorporated into the final case study. Each student on the team wrote a personal reflection about each interview. All of the data was uploaded to the Dropbox to share for the writing of the final specific case study. Interview data and videos were added to the websites, links, articles and reports about the specific social entrepreneur, which provided a rich data source for the case study article and presentation.

**Step 4: Reflective Observation: Writing and Presenting Case Studies**

The final stage of the experiential learning cycle is reflective observation. Students have returned from the trip with their observational notes and interview data, as well as supplementary materials provided by the social entrepreneurs. Students will also draw on supplementary materials collected at the start of the semester (i.e., the industry reports and newspaper articles from university databases). A written case study is employed as the method of reflective observation because it requires students to reflect not only on core concepts, but also on their own data and observations. It also requires them to reflect on their own learning process. A case study is essentially meant to give the reader a sense of the process of investigation and discovery that the writer experienced.

The case study preparation draws on instructions from the University of Texas at Austin Learning Sciences (https://learningsciences.utexas.edu/teaching/learning/critical-thinking/new-contexts/case-studies/student-created).    Students should first organize their interview notes, field notes, and supplementary materials. Individually, students should attempt to identify one or two key issues related to the entrepreneurial process and stakeholder management (i.e., balancing social and economic demands). Then, as a group, students can determine what will serve as the core problem(s) to be addressed. No more than one or two problems are recommended, and the instructors should again revisit the differences between stakeholder groups.

The structure of the case study should read like a mystery: the problem that the reader will solve should be described immediately in narrative form. Students should be afforded great flexibility here, since many will enjoy writing a creative, compelling narrative. Students should also draw on quotes, and primary and supplementary data to write this section. The remaining sections should cover (1) background on the location (photographs are encouraged); (2) who frequents the

location; (3) government policy; (4) business opportunities related to the social venture, key competitors, and suppliers; (5) customers and potential employees; and (6) environmental considerations.

Finally, students present their cases, as well as other interesting findings from their interviews, to the class. This can be scheduled as the final class session in the semester, with a time limit of 5-8 minutes per presentation. This forces students to focus on the most salient issues and findings, and gives more class time for discussing similarities and differences among the social entrepreneurs.

## 4. Learning Outcomes

As a result of the exercise described in this article, students will have an opportunity to extend their knowledge of social entrepreneurs and the tradeoffs they must make to operate their social ventures. Appendix B shows the grading rubric we use to evaluate the case studies. The following criteria are used to evaluate the case studies: identification of the main problems/issues; analysis of the problems/issues; proposal of effective solutions/strategies; and incorporation of course readings and additional research.

*Table 1:* Pedagogical Objectives and Learning Outcomes

| Objective | Pre-Trip Outcomes | During Trip Outcomes | Post-Trip Outcomes |
|---|---|---|---|
| Developing Research Competence | • Digital literacy (internet & library searches) to gather archival information for case<br>• Developing interview protocols<br>• Developing case structure | • Overcoming cross-cultural communication barriers<br>• Refining interview protocols in the field based on interaction with social entrepreneurs | • Presenting case study findings to peers<br>• Post-interview follow up with entrepreneurs<br>• Completing case study for final submission |
| Understanding Social Enterprise Processes | • Interacting with social entrepreneur guest speakers<br>• Reading and discussing case studies on social enterprise development | • Learning how social enterprises cover costs while serving local communities<br>• How social enterprises integrate social media and outreach efforts | • Transcribing interviews<br>• Writing description of social enterprise development |
| Understanding Stakeholder Management | • Interacting with social entrepreneur guest speakers<br>• Reading case studies of social enterprises that balance multiple stakeholder demands | • How social entrepreneurs integrate local politics into enterprise planning<br>• How a social entrepreneur embedded herself in a community for two years prior to starting her org. | • Identifying key issues from interviews on balancing social and economic demands<br>• Clarifying needs of stakeholder groups and how to address them |
| Developing Leadership Skills | • Practicing interview skills with guest speakers<br>• Researching a case study as a team | • Applying interview skills in the field<br>• Learning how to work as a team in the field | • Comparison of student case studies to develop own insights into social entrepreneurship process<br>• Presenting findings to audience of peers |

Student learning is enhanced in four areas as a result of the field study and case writing: (1) developing research competence; (2) understanding the operation of social enterprises and other entrepreneurial ventures; (3) understanding the management of diverse stakeholder demands; and (4)

developing leadership skills. Table 1 explores each of these learning areas in detail over time, from pre-trip activities through post-trip reflection, and provides specific examples of student learning drawn from our implementation of this exercise via a field trip to Brazil.

Students enhance their research competence in diverse ways through this exercise. By actively experimenting with interview protocols of their own design, supplemented by classroom-based worked, students are prepared to better understand and interact with social entrepreneurs in a field-based setting. These research techniques are refined and applied in the field, where students are able to directly discuss founder expectations and demands related to marketing, accounting, fund raising, hiring, and other aspects of the venture creation process. The process of writing a case study allows students to reflect on their experiences, and on their own learning process. It also allows students to develop their skills in integrating primary data they have collected with secondary data based on pre- and post-fieldwork research. Learning outcomes related to entrepreneurial actions that are critical to new venture creation stem directly from the shared insights and experiences of expert social entrepreneurs (Pittaway & Cope 2007). For example, one student group learned through their interview that many critical success factors prior to launch run counter to what is taught in the classroom. The goal of the social venture in this example is to improve the quality of life in cities by integrating informal communities (favelas, in this case) with formal communities. The students assumed critical first steps involved a formal business plan or some other "top-down", planned process. In truth, the founder of this venture spent much of the first two years embedding herself in the local informal communities. In her own words she was, "just present", and open to listening to issues on the residentsí terms. It was in this way that she was able to build the personal relationships necessary to begin the process of creating the social venture. Through this social entrepreneurís example, students also learned how to build loyalty with members of various stakeholder groups, even when goals among them conflict (Gordon 2007).

In another instance, students in one group encountered various communication issues stemming from their inability to speak in the language of their interviewees, Portuguese. Nevertheless, they were able to successfully complete their interview and get the information they needed on the operation of the social enterprise in question by using a mix of "English, broken Spanish, and hand gestures" as one student termed it. This ability to navigate language and other communication barriers through adaptive behaviors is a fundamental success factor for field researchers. The importance of these shared insights in identifying critical entrepreneurial behaviors also reflects emerging trends in social entrepreneurship pedagogy that seek to move students away from the classroom, and into day-to-day experience (Coff & Hatifield 2003, Litzky, Godshalk, & Walton-Bongers 2010). This can help fill a research gap between what is taught in business schools and the reality of entrepreneurs' daily lives

(Edelman, Manolova, & Brush 2008, Tyler, Anderson, & Tyler 2009, Gartner, Frid, & Alexander 2012).

One outcome reflecting student understanding of social enterprise processes involved ways in which social ventures can discover and exploit new opportunities "on the fly", especially under conditions of significant resource constraints. One team of students reported how a social entrepreneur discovered a way to both cut costs and aid rural communities while filming a documentary on Brazilian truck drivers. The truck the film crew was using was also transporting construction materials from one site to another across the Brazilian countryside. Over time, a number of large clay pots had accumulated because none of the sites had a use for them. The extra weight added to fuel costs. They realized they could clean the pots and distribute them to communities where potable water was scarce because the clay used acts as a natural water filter. This significantly reduced fuel costs while assisting communities across rural Brazil.

Students are also able to identify various stakeholders surrounding the social entrepreneur. For instance, student learning outcomes specific to cases written in a recent iteration of this field study (situated in Brazil in this instance) include: (a) the empowerment of women through the production and sale of hand-crafted, artisanal goods; (b) the social legitimization of favela residents through community-driven social initiatives; (c) the education of indigent Brazilians via the development of computer literacy; and (d) the methods by which individuals can address institutional-level injustices such as large scale pollution, the lack of clean water, and the lack of adequate sewage removal. Learning outcomes related to balancing stakeholder demands also included the following student comment reflecting how community, business, and environmental stakeholders were affected:

> We met with the project representative of [name of social venture removed] and learned about the favela community in Salguiero. I had the notion that favelas were dangerous slums of Brazil, however, I was exposed to a different perspective through this course. I was impressed and inspired to meet the entrepreneurs who are making a difference in their community by providing access to internet resources via an internet cafè, providing food from a community garden and providing a meeting place for residents in a local bakery that supports community projects and initiatives.

Whereas this finding contributes to student understanding of the descriptive aspect of stakeholder theory (Donaldson & Preston 1995), students are also able to explore the normative dimension through the behavioral guidelines that social entrepreneurs create for themselves as they operate their ventures. According to another student in our course:

> I was shocked at the videos and photographs of the polluted waters around and in the city of Rio. With the upcoming Olympics, I would have thought that the environment and health of the city and it citizens would be a priority. It was amazing to meet and talk with [name removed], a renowned environmentalist,

and to see that he has dedicated his life to trying to increase awareness and take positive steps to address environmental degradation in and around Rio.

This entrepreneur spent most of his lecture and interview describing his personal mission to uncover institutional level corruption related to the environmental degradation of the city, and how the pursuit of this mission resulted in threats made to himself and his family. In this way, students not only learned how this individual was empowered to shape his social and environmental landscape in the face of adversity (Mckone-Sweet, Greenberg, & Wilson 2011), but they were able to experience it first-hand.

Another group of students interviewed an entrepreneur who developed a smartphone app which is officially sponsored by the 2016 Rio de Janeiro Olympic Games. The app provides accurate menu translations of local, member restaurants for tourists who do not speak Portuguese. The woman who developed the app needed R$2.5 million to grow her venture and she described her fundraising process as attending large conventions with the express purpose of meeting investors. The students had been unaware of the existence of such opportunities. The experiential learning at the core of our exercise also exposed students to entrepreneurial passion (Gundlach & Zivnuska 2010) and the pursuit of personally meaningful work (Michaelson 2009). For instance, some students find traditional business careers can be combined with careers in social entrepreneurship, and that it is possible for these careers to follow in succession:

> My social entrepreneurship assignment was [name of social venture removed] and I can say that I was extremely inspired with meeting [name removed]. His passion and dedication was compelling. What was most interesting to me is that he started out in the business world and was successful, but not happy. He knew that he needed to return to his passion- helping people through technology and education.

As noted by Sroufe and colleagues, responsible leadership competencies may be developed through targeted experiential exercises, in particular those which focus on field immersion experiences for students in international settings (Sroufe, Sivasubramaniam, Ramos, & Saiia 2015). By situating the exercise described in this article internationally, as we have, instructors may help students to develop additional leadership competencies that are becoming increasingly important in a globalized business world. Some of these competencies include: becoming culturally self-aware; developing cultural consciousness; working in multicultural teams; negotiating across cultures; and identifying and supporting environmental sustainable practices in communities, businesses, and development. While this is not an exhaustive list, we believe that adding an international dimension, if at all feasible, may greatly enhance the impact of this exercise for students.

We note that one gap in our strategy for teaching research competency emerged during student teamsí case study presentations. Only one team was able

to find information on-line about one of the social entrepreneurs we met in Brazil. When we asked the other teams why they did not find any information their response was, "We just couldn't find anything". We had taken for granted studentsí digital literacy, especially as it relates to information literacy. Information literacy encompasses critical thinking skills and the ability to search for, locate, and evaluate online information (Ng 2012a, 2012b). In other classes we have successfully taught information literacy in a business research context by having one of the university's librarians lead a class session on how to conduct various types of online searches. We plan on adding this component to future field studies.

## 5. Conclusion

The goal of this exercise is to provide students a richer educational experience through personal engagement with experts and leaders operating as social entrepreneurs. This field study addresses what we view as a gap in social entrepreneurship pedagogy—hands-on, experiential education in social entrepreneurship and the challenges and opportunities social entrepreneurs must confront as they act to balance the needs of multiple stakeholder groups.

We feel having students develop their own research agenda, collect and analyze the data, and then write a case study, is an approach that is well suited to the experiential learning cycle. The act of writing a case study compels students to create something allowing anyone to experience the process of investigation and discovery the students themselves experienced. To do so, students must reflect on their own learning process and present the information in an instructive and interesting way. This is an essential outcome of experiential learning.

We also feel any class, in any location, can implement this exercise. It is often assumed that social entrepreneurship is only about international problems in developing countries. But the reality is that there are individuals everywhere working to address inequities and injustices, and often in our own backyards.

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## Appendix A

Additional Materials Provided to Students

The following list describes tools and materials we provide students before and during the field study.

1.  Links to websites for each social entrepreneur.

    a. Note we only provide one or two online resources as our aim is for students to conduct independent research on each entrepreneur.

2.  Initial interview protocol.

    a. Note this is refined before, and during the field study.

3.  Articles on core concepts used in the course (Social Entrepreneurship; Stakeholder Theory)

    a. http://sehub.stanford.edu/explorer-1 (social entrepreneurship)
    b. http://www.villanovau.com/resources/project-managementstakeholder-management/#.VzPLsWOZhsM (stakeholder theory)

4.  How to write a case study:

    a. https://learningsciences.utexas.edu/teaching/learning/critical-thinking new-contexts/case-studies/student-created

5.  Matching t-shirts. Students wear these when conducting field interviews. If budget allows we recommend more formal polo shirts.

# Appendix B

## Grading Rubric for Case Study Evaluation

Section # / Team /  Total Grade: _____ / _____ / _____

| | **10 points each box** | **5 points each box** | **5 points each box** | **5 points each box** |
|---|---|---|---|---|
| **Identification of Main Problems** | Main problem(s) related to key course concepts (behavior and stakeholder theory) | Narrative used to introduce the problem (setting, characters, plot). | Problem is apparent within the first few paragraphs. | Grammar, spelling, clarity. |
| **Analysis of Problems** | How does the problem affect each stakeholder group? Be specific, focusing on people and firms. investors, stockholders community, consumers employees and managers natural environment | How does the problem relate to entrepreneurial actions for either (or both): recognition of initial opportunity; creation phase of the social venture operating the venture | How do actions and balancing stakeholder needs interact in this case? | Grammar, spelling, clarity. |
| **Effective Solutions Proposed** | What actions were taken to implement the solution? | How were stakeholders needs addressed (or not)? | What might be another solution? | Grammar, spelling, clarity. |
| **Links to Readings and Research** | ▲                    ▲                    ▲                    ▲<br><br>Excellent research into each box above, with clearly documented links to readings and supplementary materials **(25 points!)** | | | |