



LOCAL SOCIAL ECONOMY PARTNERSHIP FUND



**REPORT ON ACTIVITIES UNDERTAKEN
BY THE
SOCIAL ENTERPRISE ALLIANCE MIDLOTHIAN**

AUGUST 2007 - MARCH 2008



The photographs on the previous page show:

1. The SEAM networking event
2. The Christmas Fayre
3. The Funding Event
4. Guthrie Handley from the Scottish Government at the funding event

LOCAL SOCIAL ECONOMY PARTNERSHIP FUND REPORT ON ACTIVITIES UNDERTAKEN BY THE SEAM AUGUST 2007 - MARCH 2008

1.0 PURPOSE OF THIS REPORT

The purpose of this document is to report on funding given by Communities Scotland to the Social Enterprise Alliance Midlothian (SEAM), the local social enterprise partnership, and to report on progress against the SEAM Action Plan.

2.0 BACKGROUND

2.1 *Activities funded by the grant*

In August 2007 Communities Scotland gave SEAM a grant of £15,500 to undertake the following work:

- A Strategy Review Event;
- Training;
- Sessional/ freelance/ consultancy work.

In January an additional grant of £3,500 was given to undertake the following activities:

- Networking Event;
- Promotion of SEAM;
- Midlothian Social Enterprise Newsletter (x 2);
- SEAM website upgrade.

A final grant was given in January to allow us to employ a *Graduates for Growth* graduate to undertake research about the new commuter economy in Midlothian.

2.2 *Consultancy*

The bulk of the initial grant was used to employ two consultants, who undertook the following tasks:

- To lead on raising the profile of social enterprise activities and developing new markets for social enterprises in Midlothian. This includes:
 - improving the SEAM website;
 - maximising opportunities for publicising the sector and its activities, including using the local press and community radio station;
 - enhancing the capacity of local social enterprises to market their own goods and services;
 - organising and publicising a direct-to-the-public selling event in November, targeted at social enterprises with goods to sell;
 - Identification and investigation of potential new markets for social enterprise, including opportunities identified by existing social enterprises and opportunities with the public sector locally;
 - Assisting with the organisation of events and publicity and representing SEAM to organisations and individuals;
 - To collate all the existing publications/resources available to social enterprises and create a directory on the website;

- Worker will develop partnerships with local FE/HE providers to scope the potential for educational/training placements and promote social enterprise to students as a career option. This is to promote and to attract new talent and innovation into the sector. This could also be done with private sector. Partnership scheme model to be identified and reported.

The brief for the consultants can be found in Appendix A.

2.3 Training

A training needs questionnaire was distributed to identify suitable training. On the basis of the responses the following training courses ran:

- Project Management
- Bookkeeping - Hands On
- Supporting Lone Workers
- First Aid Training
- Governance
- REHIS - Basic Food Hygiene

A funding event entitled 'Enterprise and Regeneration' was also organised in partnership with Midlothian Council.

2.4 Links to the SEAM Action Plan

The first task undertaken with the LSEP funding was to run a Strategy Review Day, which took place in September 2007. At the Strategy Day a new Action Plan was agreed for SEAM, with activities listed under the following headings:

- **Aim One:** Raising the profile and proving the value of social enterprise
- **Aim Two:** Opening up markets
- **Aim Three:** Improve the availability of information and understanding of the range of finance options available to social economy organisations
- **Aim Four:** Developing the trading capacity of social enterprises by providing better business support
- **Aim Five:** Our Partnership

The rest of this report examines activity against these headings.

3.0 Aim One: Raising the profile and proving the value of social enterprise

3.1 Publicising the Sector

Action: Maximising opportunities for publicising the sector and its activities, including using the local press and community radio station;

It was decided that SEAM should consider improving its own marketing by re-establishing its identity and making more focused contact with its target market. Activity undertaken to do this included the setting up of new email address info@seamidlothian.co.uk for use in all future correspondence, and the e-contact list for use with all SEAM correspondence was updated.

To tie in with Social Enterprise Day in November a social enterprise feature was created for the Dalkeith Advertiser. 12 social enterprises placed adverts and Richard Vivien of MARC commented '*The response to the ad was fantastic*'. It is hoped that with the marketing support being offered SEAM will be able to encourage more effective advertising for the sector. The adverts have now been added to the SEAM website.

Tentative discussions have also been held around a regular social enterprise feature appearing in the Dalkeith Advertiser but due to changes in personnel at the paper, and a new editor being recruited these discussions have been put on hold at present.

SEAM has discussed with Black Diamond FM, the local community radio station, a project to record six social enterprises about their services and products and the added value to the community they provide. These segments will be slotted into programmes throughout their schedule.

The Mid and East Lothian Chamber of Commerce has agreed to include a Social Enterprise Innovation Award in 2008. Further negotiations will take place to decide on criteria, etc. The Royal Bank of Scotland Community Division has been approached for sponsorship of this event by offering business financial support to the winner.

There has also been discussion around SEAM becoming a member of the Chamber and their members being allowed to attend Chamber events on a rotating basis. Midlothian Voluntary Action has now joined the Chamber on behalf of SEAM.

3.2 Representing SEAM

Action: Assisting with the organisation of events and publicity and representing SEAM to organisations and individuals.

One of the key tasks taken forward by one of the consultants was developing the Midlothian Social Enterprise Network, which had been in abeyance. SEAM have encouraged the re-emergence of the MidSEN. The consultant has facilitated two meetings, invited a speaker from Fife Social Enterprise Network to talk about how involvement in the network and linking with their LSEP has benefited her social enterprise and the other members of the network.

Through MidSEN SEAM has promoted several initiatives and two social enterprises have become involved with a mentoring programme organised by the Chambers of Commerce, one has accessed the Edinburgh Group for free consultancy support, and another has approached Pilotlight with a view to gaining a year long range of support for the social enterprise and their Board.

MidSEN are keen to take part in future SEAM activity, such as the SEAM meeting when a speaker from NHS Procurement will speak and the proposed SLA negotiation training.

Although there have only been two meetings to date several of the attendees have started to make connections with each other and are looking into creating partnerships to make joint bids and source services from each other.

MidSEN has agreed to hold their meeting bi-monthly on alternate months to the SEAM meetings and are very keen to strengthen their links with SEAM.

3.3 Partnerships with Further and Higher Education Providers

Action: Worker will develop partnerships with local FE/HE providers to scope the potential for educational/training placements and promote social enterprise to students as a career option. This is to promote and to attract new talent and innovation into the sector. This could also be done with private sector. Partnership scheme model to be identified and reported.

Graduates for Growth - After discussion with this organisation, Phase 1 of a 3 phase programme has been put in place. The Research part of the programme on the changing demographic of Midlothian has been completed. Phase 2 will consist of identifying gaps in the market that social enterprise can fill and Phase 3 will involve a graduate working with three or four social enterprises on marketing their services to the identified markets. (Phases 2 and 3 will be dependent on funding.)

The Edinburgh Group - This group of students from Edinburgh University have formed a *pro bono* consultancy offering support to the social enterprise sector. They have carried out research on behalf of Midlothian Befrienders, an emerging social enterprise, and have produced a report on how the organisation can go forward to become more sustainable. It is hoped that other Midlothian social enterprises will be able to take advantage of this initiative.

Queen Margaret University - SEAM has linked with QMU and is giving a presentation to second year business students with a view to raise their awareness, encourage placements, and become involved in practical projects which will further their studies and benefit the social enterprises. A presentation by MARC will also be made where they will promote their bike recycling operation with a view to increasing cyclers at QMU.

Jewel and Esk Valley College - Discussions have been held around how business students might become involved with local social enterprises. The curriculum is being looked at to look at how a partnership can be created. Ideas mentioned are presentations being made to the students by social enterprises and placements.

Newbattle Community High School - After discussion the High School are looking into inviting speakers from social enterprises into the school to talk to their students. It is hoped ultimately that social enterprise will become the focus of the enterprise projects that the school undertakes.

4.0 Aim Two: Opening up markets

4.1 Christmas Fayre

Action: Organising and publicising a direct-to-the-public selling event in November, targeted at social enterprises with goods to sell'. It was decided that this would be in the format of a Christmas Fayre.

The Christmas Fayre took place on Wednesday 28th November from 10.30 am to 2pm in Dalkeith Arts Centre.

Organisations who ran stalls

Bill Russell Woodburn Youth Group;
 British Heart Foundation;
 Cancer Research;
 CHAS;
 Gorebridge Community Development Trust;
 Help the Aged;
 Kidney Research;
 McFi;
 MARC;
 Marie Curie Hospice;
 Midlothian Voluntary Action;
 and Oxfam (pictured left).



Cost of event

Direct costs were kept to a minimum with the main expenditure being on hall hire (£99) and printing of promotional posters & flyers (£34). Our local Tesco, Lidl and Ford the Bakers supported us with goods in kind for the café.

Promotion of event

The event was advertised free of charge in the SEAM funded Social Enterprise Week advert in the Midlothian Advertiser. Posters were distributed by hand and post to many shops, offices and local community facilities in the area. The event was also promoted by email to all on the MVA and SEAM mailing lists and to all Midlothian Council staff. It was listed on the events page of Midlothian Council website and Edinburgh Guide website, and was promoted via Black Diamond community radio. Flyers were given out on the day and a large banner was displayed in the window of MVA and outside the Arts centre building.

Income Raised

The eleven organisations took a total of £1120, with £70 of that total being generous contributions for teas and coffees taken by volunteers from the Bill Russell Woodburn Youth Group.

Feedback

Feedback was varied with some groups being very happy with the day while the others were a little disappointed:

“ Very good - particularly early part of the day”

“Brilliant - more than a normal day’s takings”

“Next time we’d bring more fair trade products like tea and coffee as they were in demand and we had only Christmas goods with us.”

“Very good - would have liked more craft items perhaps from local groups”

“Our stall was so successful we had to bring in further supplies at midday.”

“Disappointing turnout, perhaps you could coincide it with ‘German Market’ day next year or at least consider having it on a Saturday”

“Needs to be promoted more in local shops as many people didn’t know about it”

Lessons Learned

Products that sold well on the day included local produce baskets, fair-trade goods, notelets, jewellery and handmade cards. It is worth considering this for future events and matching supply with demand.

It is important to begin organising the event earlier particularly in terms of contacting possible stallholders perhaps at the beginning of September.

Providing stallholders with promotional material to ensure they are distributing it to their sources and supporters.

4.2 New Markets

Action: Identification and investigation of potential new markets for social enterprise, including opportunities identified by existing social enterprises and opportunities with the public sector locally;

It is recognised by SEAM that the nature of Midlothian is changing, with an increasing amount of new housing being built to service a population that commutes into Edinburgh. However, while SEAM’s partner agencies are familiar with the data relating to deprivation in Midlothian there is not as yet a familiarity with market information.

Therefore, a brief for research into the ‘New Commuter Economy’ in Midlothian was drafted. The research is in three stages:

1. establish the extent of the new commuter economy in Midlothian;
2. identify the types of goods and services they are likely to require; and
3. work with 4/5 local social enterprises to investigate developing relevant goods and services.

Funding was obtained from Communities Scotland to employ a Graduate for Growth graduate to undertake research on the first stage of the project, namely:

This phase of the research will make use of existing sources of information (including Business Gateway's Enquiry Fulfilment and Research Service, and Midlothian Council's information about new house building). It will bring these together to draw up a picture of who is moving into Midlothian, namely:

- *Demographics (e.g. age and family structure);*
- *Income bracket;*
- *Location in Midlothian.*

1. The key findings from the research were that there are up to 8000 new houses planned to be built in Midlothian. Large Families with one or two parents working in Edinburgh and the surrounding areas (with a moderate to high disposable income)
2. New Families looking to expand with a moderate disposable income
3. Young commuting professionals looking to start a family (with a moderate to high disposable income)
4. Young commuting professionals looking to start a family (with a moderate to high disposable income)
5. Empty Nesters/elderly downsizing (with a moderate disposable income)

These home buyers are likely to be time poor, with higher stress levels, they are likely to have a moderate to high disposable income, and be seeking a better quality of life. A separate report has been produced detailing the findings of the research.

- 4.2 SEAM had a discussion with Melville Housing about new market ideas. Melville already heavily commit to the sector through their partnership working with McSence and although initially there did not seem to be any direct contracts available several ideas came forward. These ranged from concierge services, a shopping service, security lighting and peep-hole provision. These ideas would be passed on to the researcher and MidSEN.

5.0 Aim Three: Improve the availability of information and understanding of the range of finance options available to social economy organisations

The Scottish Government recently announced its spending plans for the next three years, which has a number of implications for funding sources available to local organisations. Therefore a funding event was arranged to update Midlothian organisations on the new developments in funding available through grants, loans and contracts.

In the morning there was a range of national funders in attendance:

- The **Scottish Government** spoke about their funding for social enterprises;
- The **Voluntary Action Fund** and the **Coalfields Regeneration Trust** spoke about their new criteria for funding, and the funding they have available;
- **Leader +** gave an overview of the funding available for rural areas;
- Workshops were provided on: Making a Good Application; Costing Your Application; Developing a Social Enterprise Application; and Funding for Rural Areas;
- A range of funders had stalls at the event including **WREN**, **Social Investment Scotland** and **Lloyds TSB Foundation for Scotland**.

In the afternoon there was a focus on local funding:

- There was a presentation on the new **Fairer Scotland Fund** - government funding that is ring-fenced for Midlothian and the outcomes that funding bids will have to meet;
- This was followed by workshops which will give local organisations a chance to say how they think this funding should be distributed in Midlothian.

64 people attended the event. Of those who returned evaluation forms 80% rated it 4 or 5 out of 5.

Just to say thanks for organising a really useful event – lots of info and valuable networking – well done.

6.0 Aim Four: Developing the trading capacity of social enterprises by providing better business support

6.1 Improving the SEAM website;

The website was created when SEAM was first established, and contained a lot of information that was no longer relevant. Therefore the site was comprehensively overhauled, and was simplified to make it more user-friendly.

The focus was two-fold i.e. the layout and visual aspects of the site and the content itself.

After discussion the targets were identified as 2 distinct segments - social enterprises and the general public with the website designed to meet their needs accordingly:

1. A one stop shop for social enterprises where they could locate useful information re current issues and business and support information.
2. A directory of local social enterprises listed both alphabetically and by product and service.
3. A third section of the website provides background information on Social Enterprise and SEAM's work past and present.

Feedback on the site was gained from the participants in the networking event. The site can be accessed at <http://www.seamidlothian.co.uk/>

6.2 Marketing for Social Enterprises

Action: Enhancing the capacity of local social enterprises to market their own goods and services;

It was identified that marketing is a key area where social enterprises lack knowledge and expertise. Local social enterprises were offered the opportunity for a one-to-one session with a marketing consultant. There have been three one to one marketing sessions with Loanhead Miner's, Nordoff Robbins and Loanhead Community Learning Centre and a workshop attended by 7 After School Clubs.

Common themes that emerged from the workshops were:

What is Marketing?

Due to shortness of time especially during the workshop we focused on target marketing and communicating about our product or service in a focused way.

Who are our customers?

In discussion often organisations were aware of who their customers are but haven't sat down to identify them. We worked on focusing the marketing message in website and all communication to the different potential targets, for example, appealing to service users and corporate users with different message.

Organising promotional activities

Enterprises would benefit from developing a marketing calendar to focus on making the most effective use of promotional effort.

Marketing knowledge

All organisations need to gather information about their marketing, for example, “How did you hear about us?”

The general consensus was that it was good to have someone to ‘bounce ideas around’ with.

Thank you very much for coming to Lasswade last week for the marketing session. I did find the session very useful, as the whole area of marketing is something which N-R Scotland has not given much time and attention to over the years.

Having the opportunity to discuss some ideas with you helped to make fairly ambiguous thoughts on the matter seem more concrete and achievable. I will certainly let you know how things go or get in touch if we have any more questions.

**Janet Halton
Nordoff Robbins**

6.3 Information Directory

Action: To collate all the existing publications/resources available to social enterprises and create a directory on the website.

Information on a wide range of resources and useful information is now on the SEAM website at www.seamidlothian.co.uk

6.4 Training

SEAM ran five training courses; full information on these is to be found in Appendix C. The numbers attending and their feedback is noted below:

Training course	Date	No's attending	No's rating 4 or 5 out of 5
Project Management	13/11/07	14	93%
Bookkeeping - Hands On	27/11/07	8	100%
Supporting Lone Workers	06/02/08	11	90%
First Aid Training	19/02/08	13	91%
REHIS - Basic Food Hygiene	19/03/08	14	100%

It was recognised that many social enterprises are growing fast, and that their Boards would benefit from some support. Therefore local social enterprises were offered governance training. Unfortunately only three Boards took up the offer.

7.0 Aim Five: Our Partnership

7.1 Strategy Day

The purpose of the strategy review day was to review the progress of SEAM to date towards its goals set out in the strategy document 'The Social Economy in Midlothian: A Framework for Development'. The SEAM partnership felt it was an appropriate time to review and update its strategic goals and to develop a clear action plan for the partnership's future work. The Scottish Executive launched the national strategy for social enterprise 'Better Business' in March 07, therefore, the evolving policy context was another reason for updating the local strategy. The Scottish Government has adopted 'Better Business', and the Social Enterprise Unit, part of the Public Sector Reform Directorate, has this as part of their remit.

The event took place on Thursday 11th September at Melville Housing Association, Dalkeith. 10 partner representatives attended the day.

The purpose of this event was to:

- Review progress of 'The Social Economy in Midlothian : A Framework for Development';
- Review the policy context and impact of having a new political administration;
- Get input from SEAM partners about the future strategic direction of the partnership;
- To develop an action plan for future SEAM work.

The focus of the day was on the partner's ideas, to bring the broad range of experience of the SEAM partners' expertise and knowledge to inform future strategic direction. The focus was on the ideas and the activities to deliver these ideas, rather than the detail and practicalities of taking the ideas forward, this would be done at a later stage.

In light of the launch of 'Better Business', SEAM adopted the 4 national headline objectives to structure the workshops and to examine if SEAM wanted to adopt the national objectives at the local level for the revised strategy. SEAM would also examine if there were any additional objectives that fit the local context. It was recognised that both 'top down' and 'bottom up' influences must be considered when developing the strategy. 'Better Business' explicitly differentiates between social enterprises and the wider social economy, the national strategy focuses on the former. SEAM do not make this distinction at this time, due to the nature of the sector locally they view the local strategy as relevant to any social economy organisation that wishes to increase its sustainability through trading.

A copy of the updated Action Plan, based on the discussions at the Strategy Day is in Appendix B.

7.2 Networking Event

A follow up event was held to get additional feedback on the Strategy.

This took place on Tuesday 22 January (pictured), and seven organisations participated.



Several additional activities were added into the action plan as a result of the networking event.

8.0 EXIT STRATEGY FROM LSEP FUNDING

Toward the end of the project the two consultants met with Lesley Kelly (Midlothian Voluntary Action) and Gary Fraser (Midlothian Council) to discuss continuing the work that has been started.

It was agreed that SEAM needs a differentiated marketing strategy, which recognises that social enterprises have different marketing needs, and that different markets in Midlothian need to be targeted in different ways. Key issues for the Strategy are:

Information and Training for Social Enterprises

It would be useful to continue to produce a SEAM e-newsletter, but that it would be useful to present it in a HTML format. The cost of having a template created would be in the region of £300.

Organisations continue to need training and individual support on marketing, on all aspects from the production of appropriate flyers, to developing their own marketing strategies. As a first step some basics of marketing will be included in the next SEAM newsletter.

Using the Local Press

The local press is of benefit to social enterprises that are seeking to sell to the general public, and targets a market of older, longer term residents in Midlothian.

Some social enterprises in Midlothian would benefit from regular advertising in the local paper, The Advertiser. The current costs of the adverts are:

¼ page mono	£140
¼ page colour	£170
½ page mono	£285
½ page colour	£335
Full page mono	£570
Full page colour	£670

Some of these costs could be recharged to the social enterprises themselves, but coordination would need to be undertaken by SEAM.

Similarly, SEAM needs to coordinate the use of editorial space in The Advertiser by developing a relationship with the Editor and staff. The editor's post is currently vacant, but an early meeting should be sought with the new editor to discuss raising the profile of social enterprises, for example, through a column.

Selling to Commuters

It was noted that commuters are less likely to read The Advertiser, and may benefit from targeted marketing through their door. The cost of producing a booklet of social enterprises with services to sell start from around £1000 for 5000 (based on 8 page, 100gm Recycled A5 booklet, £913 from printing.com)

It was agreed to hold an early meeting with the social enterprises that might have

goods and services to sell to commuters, in order to develop some potential projects that could apply for Scottish Government funding.

Selling to Businesses

The issue was raised that many social enterprises have goods and services to sell that may be of interest to both other social enterprises, and to local businesses. This is not an area that has been developed yet.

Marketing

While members of SEAM will endeavour to support social enterprises to undertake marketing activities, it was noted that the amount of support needed really require a dedicated worker and budget. The key tasks for a Projects and Marketing Officer for SEAM would be:

- Working with SEAM to improve the quality of marketing through the Advertiser;
- Working with SEAM and local social enterprises to develop marketing targeted at commuters (possibly through a booklet);
- Working with four local social enterprises to develop services responding to the needs of local commuters.

Resources

The consultants did a lot of work with education institutions, and identified that it would be of use to publicise the availability of students looking for placements that could be undertaken with social enterprises.

Appendices:

- A Consultant's Brief
- B Updated Action Plan
- C Training Programmes

Brief for consultant to undertake specified tasks to deliver the Social Enterprise Alliance Midlothian (SEAM) strategy

These brief sets out the terms for tenders to deliver specified tasks within the Midlothian social economy strategy.

1. Background

SEAM is a cross sector partnership of agencies and stakeholders that works to promote the social economy sector in Midlothian. SEAM is the Local Social Economy Partnership (LSEP) for the Midlothian area and has accessed resources through the Local Social Economy Partnership Support Fund administered by Communities Scotland. This tender will specifically focus on social enterprises as distinct from wider social economy organisations.

2. Purpose of the contract

SEAM wishes to commission a consultant/freelance worker to undertake specified, time limited tasks. These tasks are linked to activities that will assist SEAM in achieving its goals set out in the Framework for Development - this document can be downloaded from www.seamidlothian.co.uk. The activities are linked to the broad outcome of raising the profile of social enterprises in Midlothian and opening up markets to social enterprises. Key activities are identified within this, these are detailed below;

3. What is required of the consultant?

- To lead on raising the profile of social enterprise activities and developing new markets for social enterprises in Midlothian. This includes:
 - improving the SEAM website;
 - maximising opportunities for publicising the sector and its activities, including using the local press and community radio station;
 - enhancing the capacity of local social enterprises to market their own goods and services;
 - organising and publicising a direct-to-the-public selling event in November, targeted at social enterprises with goods to sell;
 - Identification and investigation of potential new markets for social enterprise, including opportunities identified by existing social enterprises and opportunities with the public sector locally;
 - Assisting with the organisation of events and publicity and representing SEAM to organisations and individuals. To collate all the existing publications/resources available to social enterprises and create a directory on the website.
 - Worker will develop partnerships with local FE/HE providers to scope the potential for educational/training placements and promote social enterprise to students as a career option. This is to promote and to attract new talent and innovation into the sector. This could also be done with private sector. Partnership scheme model to be identified and reported.

4. Consultants are invited to respond to the brief with the following information:

- How they would address points above and how they would report on their findings.
 - Who they are, what their relevant experience is, and who would be working on the project (i.e. just them or a team of people);
 - A work programme for how they would undertake the work plan,
 - How many days they would spend on the project, and the cost;
 - A timetable for undertaking the work with key milestones identified - due to the nature of the funding the consultant must be available to complete this work by end March 08.
-
- Rationale of fit with legislation, policy and partner activity

All work must fit with the objectives of SEAM and local and national policy and partner activity.

Management

Management of the contract will be undertaken by Midlothian Voluntary Action (MVA) on behalf of SEAM.



Timing

Tenders for the contract to be received by 7th September 2007. The contract will be awarded on the 17th September 2007.

Contract Budget

The budget for the contract is £10, 000 including all costs and VAT. It is for the consultant to advise how best to deliver the requirements of the proposed work within budget and to provide an outline of how the work will be undertaken. The contract will be awarded on the basis of best value.

Payment

Payment will be made in two stages on submission of an appropriate invoice.
50% at the half way stage following review of progress;
50% following receipt of final report.

Tendering

This appointment will be subject to equal opportunities legislation. Tenders must be submitted by email to lesley.kelly@mvacvs.org.uk by Friday 7th September 2007.



SEAM ACTION PLAN

SEPTEMBER 2007 - MARCH 2010

SEAM’s Vision: ‘To support and promote the development of social enterprise in Midlothian.’

- Short: Next three months
- Medium: Three months to one year
- Long: Over one year

Aim One: Raising the profile and proving the value of social enterprise

What we want to achieve	How we will achieve it	What success will look like	Progress March 08
The social enterprise sector in Midlothian maintains a high profile.	<ul style="list-style-type: none"> • A Marketing Strategy will be developed for SEAM. • The achievements of the social enterprise sector in Midlothian will be highlighted through the local and regional newspapers/radio/media. 	<p>Strategy is produced and adopted by SEAM.</p> <p>6 positive stories about social enterprise in local media per annum</p>	<p>No progress.</p> <p>Currently negotiating with Black Diamond FM to record 6 social enterprises talking about their services, to be played on rotation. Also negotiating to run Social Enterprise Award with the Chamber of Commerce.</p>
Social enterprises in Midlothian successfully market their services.	<ul style="list-style-type: none"> • Social enterprises will be offered 1-2-1 support to promote their services. • The SEAM website will provide a directory of social enterprises and advertising space for social enterprises. 	<p>6 social enterprises per annum accessing marketing support</p> <p>Directory of 20 social enterprises and ten adverts on site</p>	<p>3 local social enterprises plus 8 ASC</p> <p>41 social enterprises on website Directory and 10 adverts on site</p>
	<ul style="list-style-type: none"> • SEAM will develop professional marketing materials in ‘ Plain English’. 		No progress
Midlothian social enterprises, and the wider	<ul style="list-style-type: none"> • A broad range of social enterprises will be promoted through events, e-bulletins, newsletters 	6 examples of good practice promoted per annum	No progress.

SEAM ACTION PLAN



What we want to achieve	How we will achieve it	What success will look like	Progress March 08
community, are aware of good practice in the sector.	and the website. <ul style="list-style-type: none"> Case studies and learning profiles of Midlothian enterprises will be written and used to illustrate local good practice. 	3 case studies developed and circulated	No progress.
SEAM has good relationships with other organisations, and is in a position to influence policy.	<p>National</p> <ul style="list-style-type: none"> We will build relationships with the Scottish Government, and the successor to Communities Scotland. We will co-ordinate and publicise national initiatives of benefit to social enterprises at a local level (e.g. Determined to Succeed in partnership with schools, Graduates for Growth). We will build relationships with national agencies including Development Trust Association Scotland, Community Recycling Network Scotland, Senscot, and the Scottish Social Enterprise Coalition. <p>Local Statutory Sector</p> <ul style="list-style-type: none"> We will utilise the Community Planning Partnership structure to build influence locally. <p>Private sector</p> <ul style="list-style-type: none"> We will work with the Chamber of Commerce to develop links between the private sector and the social enterprise sector, and to develop Corporate Social Responsibility activity. We will promote mentoring between private and social enterprise sector. 	<p>Scottish Government/CS successor invited to appropriate SEAM events and informed of progress</p> <p>Information on website and in newsletter</p> <p>Agencies invited to appropriate SEAM events and informed of progress. SEAM represented at their events as appropriate.</p> <p>SEAM continues to be represented in the community planning structures</p> <p>Chamber invited to appropriate SEAM events and informed of progress. SEAM represented at their events as appropriate.</p> <p>Information on website and in newsletter.</p>	Scottish Government attended and ran workshop at 'Regeneration and Enterprise' event

SEAM ACTION PLAN



What we want to achieve	How we will achieve it	What success will look like	Progress March 08
	<ul style="list-style-type: none"> • We will encourage private sector professionals, such as lawyers and accountants, to contribute to the development of SEAM. <p>Education sector</p> <ul style="list-style-type: none"> • We will build links with schools, further education and higher education institutions to raise awareness of social enterprise and encourage it to be considered as a career. 	<p>Sources of private sector support publicised to social enterprises</p> <p>Pupils, students and graduates informed about social enterprise</p>	<p>Presentation to Queen Margaret University College students with MARC (in April), Graduate for Growth graduate employed, social enterprise referred to The Edinburgh Group, contact made with Jewel and Esk Valley College and Newbattle High School.</p>
<p>The Midlothian Social Enterprise Sector can prove its worth.</p>	<ul style="list-style-type: none"> • We will promote measurement tools including SMART targets, social accounting, and quality standards. 	<p>Information on tools on the website</p>	

Aim Two: Opening up markets

What we want to achieve	How we will achieve it	What success will look like	Progress March 08
Social enterprises in Midlothian are able to tender successfully for contracts.	<ul style="list-style-type: none"> • We will develop a Midlothian Council guide for the social economy to procuring with Council, based on the Borders example. • We will provide training and support with tendering, including workshops with Midlothian Council Procurement Officer. • The SEAM website will link to relevant Council information on contracting and other contracting opportunities and links to contract opportunities will be advertised on SEAM website. • We will hold a 'Meet the Buyer' event. 	<p>Guide developed and distributed to local social enterprises.</p> <p>Workshop offered.</p> <p>Website links in place.</p> <p>Meet the Buyer event held 2009/10</p>	<p>No progress.</p> <p>Workshop on SLAs planned for April</p> <p>Website links in place.</p> <p>No progress.</p>
Social enterprises are able to sell their goods and services directly to the public.	<ul style="list-style-type: none"> • We will develop opportunities for direct selling, including events and advertising. 	<p>1 direct selling event and 2 advertising campaign per annum</p>	<p>Christmas Fayre ran in November 2007.</p>
Social enterprises are able to sell to their peers.	<ul style="list-style-type: none"> • We will promote trading between social enterprises, including raising awareness of products available. 	<p>1 networking event</p>	<p>Being done informally through MidSEN. Guest speaker from Fife MOBUS community transport, talking about their network.</p>
Social enterprises develop new ways of working	<ul style="list-style-type: none"> • We will support and promote new ways of working, including: <ul style="list-style-type: none"> • Consortia working to get larger council contracts; • 'Enterprise rehearsal' initiatives; • Public Social Partnership; • Other models as appropriate. 	<p>Two new initiatives piloted</p>	

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What we want to achieve	How we will achieve it	What success will look like	Progress March 08
	<ul style="list-style-type: none"><li data-bbox="504 331 1046 438">• We will provide information and support to ensure that social enterprises understand the different business models and legal structures available to them.	Briefing developed and on website	

Aim Three: Improve the availability of information and understanding of the range of finance options available to social economy organisations

What we want to achieve	How we will achieve it	What success will look like	Progress March 2008
Social enterprises are able to implement Full Cost Recovery in grant applications and contracts.	<ul style="list-style-type: none"> We will provide training and support on Full Cost Recovery We will provide support to social enterprises to develop business plans. 	<p>1 training course on FCR and 3 organisations requesting support on FCR issues</p> <p>6 social enterprises receiving support in year one</p>	SLA training planned for April. Workshop on ‘Costing your Application’ at funding event.
Social enterprises are aware of sources of grant and loan funding and are able to access them.	<ul style="list-style-type: none"> We will hold an annual funding conference. We will provide funding information on the SEAM website. We will promote alternatives to grants, including options to utilise assets, loans, equity Social Investment Scotland, Business Angel, and venture capitalists. 	<p>Funding conference takes place: 30 people and 4 funders in attendance</p> <p>Information provided on 20 funders, updated quarterly</p> <p>Website links to other sources of funding, information provided at funding conference</p>	<p>‘Regeneration and Enterprise’ funding event in March 2008</p> <p>Website links to providers of loan funding and Social Investment Scotland attended funding event.</p>
Social enterprises have well developed links with funders and are able to influence policy.	<ul style="list-style-type: none"> We will respond to Scottish Government and other funder consultations. We will develop relationships with funders and seek to influence the funders’ priorities. 	<p>Consultations responded to.</p> <p>Funders invited to appropriate SEAM events and informed of progress. SEAM represented at their events as appropriate.</p>	<p>No progress.</p> <p>Funders at event.</p>

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What we want to achieve	How we will achieve it	What success will look like	Progress March 2008
	<ul style="list-style-type: none"> We will work with the successor to Communities Scotland to ensure that the role of Local Social Enterprise Partnership continues to be recognised. 	CS successor invited to appropriate SEAM events and informed of progress. SEAM represented at their events as appropriate.	No progress.

Aim Four: Developing the trading capacity of social enterprises by providing better business support

What we want to achieve	How we will achieve it	What success will look like	Progress March 2008
Social enterprises in Midlothian have the skills and knowledge they need to successfully operate their businesses.	<ul style="list-style-type: none"> • We will provide an annual training programme that is responsive to the needs of social enterprises. • We will promote other providers of training on the SEAM website. • We will encourage social enterprises to share their skills. 	<p>Training needs analysis undertaken for sector and 10 training courses provided per annum.</p> <p>SEAM website links to MVA's calendar of training events.</p>	<p>3 training courses ran: Supporting Lone Workers, First Aid Training, REHIS - Basic Food Hygiene.</p> <p>Being done informally through MidSEN.</p>
Social enterprises have access to the support and advice they need to successfully operate their businesses.	<ul style="list-style-type: none"> • SEAM will act as the first point of contact for social enterprises, in a streamlined referral process. • We will provide 1-2-1 business support to social enterprises. • We will facilitate access to appropriate accountancy and bookkeeping support. • We will facilitate access to appropriate HR support. 	<p>20 enquiries dealt with per year.</p> <p>10 social enterprises receiving 1-2-1 business support in year one</p> <p>10 organisations signposted to appropriate organisations</p> <p>10 social enterprises attending HR training and/or receiving 1-2-1 HR guidance in year one</p>	<p>Referrals from MidSEN to Pilotlight, Edinburgh Group and Business mentors.</p>
Social enterprises have the assets they require to successfully operate their businesses.	<ul style="list-style-type: none"> • We will continue to seek a site and funding for a Social Enterprise Hub. 	<p>Site identified and funding secured</p>	<p>No progress.</p>
The Boards of social enterprises have the	<ul style="list-style-type: none"> • We will provide training to social enterprises on governance and HR. 	<p>6 Boards to benefit from governance training in year</p>	<p>3 organisations benefitted from governance training.</p>

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What we want to achieve	How we will achieve it	What success will look like	Progress March 2008
skills, knowledge and confidence they require to develop their organisations.	<ul style="list-style-type: none"><li data-bbox="508 411 1046 464">• We will work to bring additional capacity onto committees/boards.	one Additional capacity sourced.	

Aim Five: Our Partnership

What we want to achieve	How we will achieve it	What success will look like	Progress March 2008
SEAM is a strong and responsive partnership.	<ul style="list-style-type: none"> We will expand membership of SEAM to include new members, private sector representation and increased social enterprises attendance. We will develop the input of social enterprises into SEAM through: <ul style="list-style-type: none"> Developing a social enterprise network; Holding open meetings of SEAM; Consulting on our activity. 	<p>Private sector and additional social enterprise representation in place</p> <p>10 additional social enterprises involved in the development of SEAM activity</p>	<p>Links developed with Midlothian Chamber of Commerce.</p> <p>Social Enterprise Network established and has met twice. SEAM has had two open meetings - one to discuss the Strategy and one with a guest speaker from NHS Lothian procurement.</p>
SEAM will act as a one stop shop for social enterprises seeking support in Midlothian.	<ul style="list-style-type: none"> We will review our referral protocols on an annual basis, to take account of developments in social enterprise. 	Updated protocols drafted and agreed	No progress.
SEAM has the resources and information it requires to support local social enterprises.	<ul style="list-style-type: none"> We will maximise the in-kind and existing resources that can be used for the benefit of SEAM. We will seek external funding to develop the work of SEAM as appropriate. We will undertake research required to develop social enterprise in Midlothian. 	<p>In-kind and existing resources identified.</p> <p>Appropriate funding identified and accessed.</p> <p>Appropriate research undertaken and disseminated</p>	
SEAM supports Corporate Social Responsibility in Midlothian.	<ul style="list-style-type: none"> SEAM will support local and national businesses implementing CSR initiatives in Midlothian. SEAM will advertise and support national organisations promoting CSR. 	<p>Appropriate support offered</p> <p>Appropriate support offered</p>	
SEAM supports Fair Trade	<ul style="list-style-type: none"> SEAM will advertise and support Fair Trade 	Appropriate support offered	

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What we want to achieve	How we will achieve it	What success will look like	Progress March 2008
in Midlothian.	initiatives in Midlothian.		