

SOCIAL ENTERPRISE WORKS STRATEGIC PLAN 2007 – 2009

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1. Executive Summary

This document has been produced at the end of nine months of internal deliberation. Social Enterprise Works has undertaken a self-assessment process and identified the areas of its work that it needs to address to deliver an excellent service to the social enterprise sector.

It has also looked closely at the learning of the last two years that has been gained through the EQUAL C3 programme and the ChangeUp programmes and has projected the impact of the changes in funding streams that are starting to impact on the sector.

The result of this deliberation has been the refining of the vision, mission and aims of Social Enterprise Works and, fundamentally its rebranding. This was completed by the organisation's AGM in December 2006 and the organisation from that time will be called Social Enterprise Works.

Through the redefining of its products, increasing its own capacity to develop a trading income, we will position ourselves as a sustainable organisation able to continue to support the sector into the next decade.

2. SOCIAL ENTERPRISE WORK'S VISION, MISSION AND AIMS

VISION

Social enterprises help create prosperous, diverse and inclusive communities.

MISSION

We will support, develop and promote the social economy by maximising the positive benefits of enterprise. We will do this by being an effective, sustainable, independent social enterprise.

AIMS

1. As an effective organisation, we will

- Provide specialist support for social enterprises to start up and grow
- Deliver a range of business support services that meet and anticipate the needs of customers and stakeholders
- Be a catalyst for developments that support and/or promote the sector
- Understand and measure the impact of the social enterprise sector
- Promote and network, thus enabling the sharing of good practice, benchmarking and business to business opportunities
- Ensure all services are delivered to high quality, professional standards.

2. As a sustainable organisation, we will

- Develop a strong resource, in use of information and intelligence as well as human and physical assets
- Develop a variety of sources of income
- Understand and minimise our negative impact on the natural environment.
- Ensure our business addresses ethical considerations in its decision making
- Continuously improve our services
- Be creative and innovative

3. As an independent organisation, we will

- Be self-determining
- Be credible – rooted in our direct work with social enterprise.
- Be a route for the views of the sector to be heard
- Be challenging and engaged in public debate.
- Establish strategic links locally, regionally and nationally.
- Not be compromised by funding relationships
- Be committed to strong partnership working

3. Values

- **Empowerment**

To encourage and support local people to take control of the development of their own communities, organisations and enterprises.

- **Sustainability**

To recognise that the results of social economic developments must be enduring and to encourage self-sufficiency and independence in social enterprises.

- **Accountability**

To operate within a democratic, collaborative, organisational structure.

- **Equality**

To promote equality, access and opportunity for all.

4. Introduction and Background

Social Enterprise Works (known as BACEN to 2006) has been providing business advice and support to the social economy in the Bristol area for over ten years. We provide guidance and practical business development assistance to prospective, newly formed and established not-for-private profit social enterprises during critical periods of their start up and development. Observing appropriate professional and commercial standards, we help convert the untapped potential of individuals and community groups into successful social enterprises that improve the lives and environment of communities.

We provide a dynamic combination of business development and community regeneration expertise. We recognise that developing economic ownership in communities, which have a history of social exclusion, can make a difference to the long-term viability of these communities. We draw on the life experience, local support and commitment found across the city and work in partnership with the range of social economy infrastructure organisations working in Bristol and specialist and generic enterprise agencies working across the West of England.

Members

Social Enterprise Works is a membership organisation. As a Company Limited by Guarantee we are owned and accountable to our members. We currently have over 300 members. There are three categories of membership:

Full membership is open to existing and developing social enterprises in Bristol, which include community business, development trusts, credit unions and other social economy organisations with a mix of trading and community activity.

Associate membership is for advisory and support organisations with a direct interest in supporting social enterprise.

Individual membership is for anyone who supports the aims and principles of social enterprise.

Clients

According to the Department of Trade and industry social enterprises are businesses with primarily social objectives whose surpluses are principally reinvested for that purpose in the business or in the community, rather than being driven by the need to maximise profit for shareholders and owners" (Social enterprise: a strategy for Success – Dti 2001)

We subscribe to the Dti definition of social enterprise with the inclusion of some forms of social ownership. We support the development of not for private profit trading activities owned by identifiable communities. These can be geographical communities or communities of interest. The main criteria we look for in our clients are:

- Not for private profit
- Clear social objectives
- Social ownership
- Trading activity or intention to trade

We work with charities if they are also Companies Limited by Guarantee or they require advice and support in setting up as CLG or CIC. We do not support activities of a political or exclusively religious nature. Organisations need to have an inclusive broader social benefit than spreading a particular faith or set of beliefs.

We have three broad categories of clients:

- Social Enterprises – owned and run by local people, community organisations or similar. They are designed to bring both economic and a clearly defined social benefit to a community. They provide local value for money goods and important community services, widening the circle of regeneration within the community.
- Examples in Bristol: BABECO Nappy Company, Childrens Scrapstore and Bristol Community Transport
- Credit Unions – owned and run by their members, they offer financial services, including savings and low cost loans, with dividends for members. Members come from all walks of life, including those excluded from mainstream banking services. The five community based Credit Unions that have served Bristol are going through major change with the creation of Bristol Credit Union which will serve a common bond area larger than the city boundaries of Bristol.
- Development Trusts – independent local organisations, working for sustainable community regeneration, through a combination of economic, environmental, social and cultural initiatives, involving local people.
- Examples in Bristol: - St Werburghs Community Association, Windmill Hill City Farm.

Working in Partnership

Bristol Partnerships:

Enterprising People

This partnership grew out of the BMB (Bristol Means Business) Partnership which was EU funded Obj 1 programme running from 2002 – Sept 2005. The Enterprising People programme is also EU Obj 1 funded from Oct 2005 – Sept 2006, with Business West as accountable body. Other partners are Social Enterprise Works, Avon CDA, BRAVE and BEST. The partnership has also negotiated to support the co-ordination of the enterprise element of the Central and East Bristol Neighbourhood Renewal IEEI (Integrates Employment and Enterprise Initiative) which runs from 2006 – 2008. It has further agreed to continue to meet even where there is no direct funding or service delivery being delivery by the partnership.

Bristol ChangeUp VCSES (Voluntary, Community and Social Enterprise Sector) Infrastructure Consortium

This Consortium was set up as a response to the Home Office ChangeUp programme. We are an active member of the Bristol Consortium. In 2005/6, the first ChangeUp round, together with partners, Black Development Agency and VOSCUR, we delivered on the Funding and Financing the Sector theme. We led on the ChangeUp Performance Improvement theme and supported the infrastructure organisations in the Bristol Consortium to embed performance improvement in their organisations.

The future funding for Consortium activity is likely to be financed through Capacity Builders and other funding streams including Big Lottery. A strategic plan is in place for Bristol ChangeUp Consortium running 2006:2010 with supporting action plans.

Regional and Sub Regional

RISE – Regional Infrastructure for Social Enterprise

The Director of Social Enterprise Works has been a board member of RISE since its incorporation in 2003. RISE is delivering a range of objectives; ensuring high quality business advice is available to social enterprises, facilitating the delivery of business advice across the region, sharing good practice and lobbying on behalf of social enterprises and support agencies. RISE is playing an important role feeding into the strategic changes in delivery of business support prompted by the move of SBS from the Dti to the RDAs and how this is specifically affecting social enterprise support. RISE is funded by SWRDA.

WESEG – West of England Social Enterprise Group

This group consists of representatives of enterprise delivery agencies across the West of England, representatives of the economic development departments of the local authorities across the sub-region and a sub-regional representative of SWRDA. It is a sub-group of the Regional Renaissance Board for the sub-region with responsibility for the Social Enterprise Theme. In 2004, RISE funded a piece of consultancy work through WESEG to map the social enterprise support available in the sub-region and to draw up a delivery plan for the future, this is developing into a model know as the Hub and Spoke.

C3 EQUAL Development Partnership – Building a Credible, Competitive and Confident Social Economy.

This is a sub-regional (West of England) partnership including BCC (accountable body), Social Enterprise Works, Avon CDA, VOSCUR, Business West, Black Development Agency, Community Action, Bath & North East Somerset, North Somerset and South Glos Councils.

This is a major programme with three strategic objectives:

To embed performance improvement in the West of England social economy by developing, testing and raising awareness of EFQM based diagnostic tools and impact measurement tools.

To design and operate a new social economy support infrastructure across the West of England promoting performance improvement

To develop a 'Trade Association' for the social economy sector promoting its values, sense of identity and achievements.

This programme has three phases of action – Action one being research which took place in 2004/5. As part of this, we contributed to the delivery of an updated Social Economy Audit for Bristol City Council. Action two runs from July 2005 to June 2007 and is the main delivery phase with action 3 being the mainstreaming phase running until Dec 2007.

5. Strategic Aims

5.1 Social Enterprise Works as an effective organisation will

5.1.1 Provide specialist support for social enterprises to start up and grow

Our SFEDI accredited business advisers will deliver advice to pre-start, new start and existing social enterprises, including social economy organisations who are developing their service and trading income.

We will use the tools developed for the SW Regional Social Enterprise Business Support Service as the basis for the additional support services funded sub-regionally and locally to deliver developmental support to social enterprises.

5.1.2 Deliver a range of business support services that meet and anticipate the needs of customers and stakeholders

We will be pro-active in its relationship with clients and members – regularly contacting them and helping them to determine their future needs. We aim to provide a range of skills and tools that will assist them to continuously improve their performance. We will also identify key stakeholders and ensure we have mechanisms in place to engage in a regular dialogue with them.

5.1.3 Be a catalyst for developments that support and/or promote the sector

We will work with stakeholders and peer agencies and practitioners to identify developmental opportunities for the sector. We will be proactive in taking forward opportunities that build the capacity,

5.1.4 Understand and measure the impact of the social enterprise sector

We will ensure that we remain at the forefront of national research and developing understanding of methodology and tools for measuring impact as a means for explaining the value of social enterprise to communities.

5.1.5 Promote and network, thus enabling the sharing of good practice, benchmarking and business to business opportunities

As a membership organisation, we will ensure that our communication strategy with our members disseminated good practice and engages the membership and clients in a range of appropriate opportunities that enable them to understand and learn from their performance in relation to comparable social enterprises. We will also encourage inter-business relationships within the sector and to use our marketing functions to support economic growth of the sector.

5.1.6 Ensure all services are delivered to high quality, professional standards.

We will ensure that all staff have access to professional development opportunities. Staff will be encouraged to gain appropriate occupational qualifications and all business advisers will be expected to achieve SFEDI accreditation.

Financial management of the organisation will conform to professional standards and the management of the organisation will be continuously assessed against improvement targets.

5.2 Social Enterprise Works as a sustainable organisation will

5.2.1 Develop a strong resource, in use of information and intelligence as well as human and physical assets

We will support the professional development of our staff as set out in 5.1.6 and will endeavour to provide career development opportunities for staff within the organisation. In the medium to long-term we aim to develop a physical asset base, either on our own, or in partnership, which will secure our own organisational base and provide revenue generation to support the organisation's services. We will strive to develop our intelligence and information gathering and management capacity in a form that assists sector development and which is cost efficient and utilises latest developments in this field.

5.2.2 Develop a variety of sources of income

We will develop a clear range of products and services - from publicly funded services to consultancy services and products. The variety of income sources and customers will ensure that the organisation is protected from the impact of changes in public funding streams. As set out in 5.2.1 this may also include the management of physical workspace.

5.2.3 Understand and minimise our negative impact on the natural environment

We will regularly update our environmental policy in light of specialist advice from environmental agencies. We will implement the measures set out in our own policy and will advise clients to implement similar measures within their organisations as a matter of good practice.

5.2.4 Ensure our business addresses ethical considerations in its decision making

We will ensure that our organisational purchasing reflects ethical decision making. In particular, we will purchase where possible from social enterprises. We will not purchase from organisations who are known to be exploitative in their activities.

5.2.5 Continuously improve our services

In 2005/6 we undertook a self assessment using the EFQM Business Excellence model. We will continue to build on that assessment to work through identified areas of improvement involving customers and other stakeholders. While maintaining the cycle of continuous improvement, we will identify and implement appropriate quality assessments leading to accreditation to prove our commitment to quality.

5.2.6 Be creative and innovative

We will continuously look to learn from and implement changes in technology which support our service delivery. We will also actively look to identify new partners and opportunities to engage with clients and members in innovative ways.

5.3. Social Enterprise Works as an independent organisation will

5.3.1 Be self-determining

As set out in 5.2.2, we will develop a range of sources of income, which will ensure that while we have a understanding of the strategic needs of key stakeholders, in particular to those of funders, we will also have the independence that diversity of income source offers.

5.3.2 Be credible – rooted in our direct work with social enterprise.

We will remain a membership organisation, with our Board representative of the sector and of key organisations that support the sector. We will ensure that the membership and Board are involved in the organisation's strategic development and that this development is informed by the needs of the sector as expressed by our members and clients.

5.3.3 Be a route for the views of the sector to be heard

Through our partnership working and our voice on regional and sub-regional bodies, we have the opportunity to represent the views and expressed needs of the social enterprise sector. We will ensure that we have mechanisms, inside and outside our Board structure, to test and clarify the message that it is conveying.

5.3.4 Be challenging and engaged in public debate.

The ability to be challenging is a function of being self-determining and independent and through clear routes of intelligence gathering both through our membership and through our networking and partnership activities.

5.3.5 Establish strategic links locally, regionally and nationally.

Effective networking at all levels will enable us to develop our intelligence base, to identify opportunities for service development that benefit the sector and to share intelligence, opportunities and learning gathered through these strategic links with our membership and clients.

5.3.6 Not be compromised by funding relationships

We wish to have excellent, co-operative relationships with our funders and other investors. It is a function of risk assessment that we should work to minimise the reliance on individual funders and should therefore be in a position to make a clear judgement on our work programme based on our understanding of the needs of the sector.

5.3.7 Be committed to strong partnership working

We will bring our core values to our relationships with partners. We will work to empower the social enterprise sector through our relationship with partners. We will ensure that we are accountable to our members and that we consistently works to ensure that equalities issues are embedded in our partnership working.

We will be innovative in the development of partnership working, both to meet the needs of clusters of sector organisations and generic partnerships.

6. Service Development

6.1 South West Social Enterprise Service

We working with Co-active and other partners in the design and testing of a South West Social Enterprise Service. If the pilot is successful and the service is commissioned by SWRDA, we would wish to contract for the delivery of the service in Bristol and the West

of England. This service would provide a consistent, quality assured information and initial diagnostic service for new and existing social enterprises. We would ensure that all staff engaged on this programme would have appropriate SFEDI accreditation.

6.2 Business start-up service

For pre-start and new start clients, we would provide the initial information and diagnostic stage through SWSES as set out in 6.1. The action plan which is the outcome of that service will form the basis for an in-depth service for Bristol groups (currently funded by Bristol City Council) which will cover governance issues, taking the client into the appropriate legal structure, in depth organisational development (using the C3 PERform tool) and supporting the development of their business plan. It is expected that this in-depth service will not exceed 40 hours of adviser time, both in direct contact with the client and through desk research.

6.3 Support for established social enterprises

6.3.1 Health check and quality assurance

We will support an annual organisational health check service for established groups. This will again be based on the C3 PERform tool but will also be linked into an analysis of the appropriate quality accreditation for the organisation and with support to achieve this. Funding will be sought to deliver this service after the end of the EQUAL C3 project in June 2007.

6.3.2 Mutual learning

We will offer a programme of mutual learning and benchmarking activities for existing social enterprises. These will focus on improving performance and peer support, building on learning through the C3 programme and other initiatives such as the Beacon programme. This programme will support and link with any developing Trade Association for Social Enterprise, whether locally or regionally based. Funding will be sought to deliver this service after the end of the EQUAL C3 project in June 2007.

6.3.3 Knowledge sessions and other training opportunities

We will continue to develop a programme of informative sessions around issues of good practice and key factors that influence the development of the sector.

Through the ChangeUp Consortium, we will work closely with other organisations providing training for the sector and will contribute the expertise of our staff members to those programmes.

6.3.4 Access to pro-bono professional support

We will continue to work with Burges Salmon to deliver pro-bono legal support to the sector. We will look for opportunities to extend the range of pro-bono support available to social enterprises.

6.3.5 Social Enterprise Works Consultancy Services

We will provide tailored packages of support to individual organisations to meet their organisational needs. Each piece of work will be designed with clear outcomes and a clear charging structure.

We will continue to develop our expertise in the fields of social impact assessment and will offer this service on a consultancy basis to organisations who, while not being traditional social enterprises, are concerned to achieve positive social impact.

6.4 Members' information service

We will use our website and other information tools to keep our membership informed of policy development that impacts on the sector and of opportunities for involvement in the development of that policy. We will also act to develop services and opportunities that develop the markets for its membership, building on the Directory of Social Businesses as an interactive structure.

6.5 Asset Development

We will seek to identify and acquire a substantial building, which will be suitable for its co-location with other agencies. The building would also provide workspace for other organisations, which would provide an income stream for us in the medium to long term.

Timescale for service development:

Service Area	Programme 06/07	Programme 07/08	Programme 08/09
6.1 South West Social Enterprise Service	Participate in development/ Pilot phase	Contract for delivery In Bristol/WoE	Contract for delivery In Bristol/WoE
6.2 Business start-up service	Deliver BCC core inv target. Deliver C@H community business support programme Support IEEI Central & East targets	Provide Brokerage level service to support BCC investment Support LEGI targets through Enterprise Agencies Consortium Support IEEI Central & East targets Secure funding to deliver service in West of England area.	Provide Brokerage level service to support BCC investment Support LEGI targets through Enterprise Agencies Consortium Secure funding to deliver service in West of England area.
6.3 Support for established social enterprises 6.3.1 Health check and quality assurance	Deliver BCC core inv target Deliver C3 performance improvement targets Deliver C@H community business support programme Support IEEI Central & East targets	Provide Brokerage level service to support BCC investment Deliver C3 performance improvement targets Support IEEI Central & East targets Support LEGI targets through Enterprise Agencies Consortium Identify funding to deliver QA	Provide Brokerage level service to support BCC investment Support LEGI targets through Enterprise Agencies Consortium Identify funding to deliver QA programme Secure funding to deliver service in West of England area.

		programme Secure funding to deliver service in West of England area.	
6.3.2 Mutual learning	Participate in Performance Hub Benchmarking programme Deliver C3 mutual learning programme	Deliver C3 mutual learning programme Link with regional Trade Association activities Identify funding to continue benchmarking/mutual learning activities for social enterprise networks	Link with regional Trade Association activities Identify funding to continue benchmarking/mutual learning activities for social enterprise networks
6.3.3 Knowledge sessions and other training opportunities	Deliver BCC investment targets Deliver C3 training programme Support ChangeUp programme – link with VCS training programme providers Link with regional training provision	Deliver BCC investment targets Deliver C3 training programme Support ChangeUp programme – link with VCS training programme providers. Support LEGI targets through Enterprise Agencies Consortium Link with regional training provision	Deliver BCC investment targets Support ChangeUp programme – link with VCS training programme providers. Support LEGI targets through Enterprise Agencies Consortium Link with regional training provision
6.3.4 Access to pro-bono professional support	Maintain relationship with Burges Salmon	Work with BiTC and other VCSES infrastructure orgs to identify and build relationships with other specialists <ul style="list-style-type: none"> - financial management - property - HR 	Work with BiTC and other VCSES infrastructure orgs to identify and build relationships with other specialists <ul style="list-style-type: none"> - financial management - property - HR
6.3.5 Consultancy services	Deliver on SWSES contract. Deliver on BEES contract	Identify funding for business development manager to lead	Develop consultancy packages. Increase consultancy income from 30%

	<p>Deliver on St Pauls UnLtd contract.</p> <p>Delivr on Global Development programme</p> <p>Develop partnership working</p> <p>Identify 2-3 large consultancy opportunities for 07/08 delivery</p>	<p>consultancy development.</p> <p>Develop consultancy packages.</p> <p>Increase consultancy income from 10% turnover in 06/07 to 30% in 07/08</p>	<p>turnover in 07/08 to 40% in 08/09</p>
6.4 Members' information service	<p>Product Directory of Social Businesses</p> <p>Complete rebranding of BACEN – to Social Enterprise Works by AGM.</p> <p>Launch Soc Ent Works website early Jan 2007</p> <p>Support C3 website and marketing role.</p> <p>Support DESE toolkit development</p>	<p>Participate in legacy for C3 website and toolkit.</p> <p>Maintain interactive elements of website.</p> <p>Produce Directory of Social Businesses</p>	<p>Maintain interactive elements of website.</p> <p>Produce Directory of Social Businesses</p>
6.5 Asset Development	<p>Delivery of BEES contract as initial investigation.</p>	<p>Support LEGI Enterprising Spaces outcome</p> <p>Scoping studies with VCSES partners and Enterprise Agency Consortium partners.</p> <p>Build business case</p> <p>Identify potential site/s</p>	<p>Support LEGI Enterprising Spaces outcome</p> <p>Building acquisition and development</p>

7. Marketing and communications strategy

The marketing and communications strategy will underpin our service development.

There will be close working with local, sub-regional and regional partners to ensure a consistent and co-ordinated delivery of information to sector organisations.

The interactive elements of our website will provide a resource for business-to-business interaction within the sector, as well as dissemination of appropriate policy developments, good practice developments and case studies.

We will continue to promote the sector in local, national and trade press and will promote both Social Enterprise Works and the sector at appropriate generic and specialist events and conferences.

8. Review and performance improvement

8.1 Internal performance management

Social Enterprise Works undertook its first internal self-assessment and action plan development in early 2006. This action plan will be monitored by the staff team and regularly reported to the Board throughout 2006/7. This self-assessment process will be repeated in an annual cycle and we will identify the key quality assurance standards that we need to attain and build these into our workplans.

There will be robust project management structures in place to ensure the delivery of both publicly funded and contractual streams of work, with effective data management to ensure ease of reporting.

Financial systems will be equally robust, to the highest professional standards and job costing and forecasting systems will be in place to support the delivery of our programmes. There will be quarterly reporting to the Board bringing together both activity and financial reporting.

We will benchmark itself against other enterprise agencies and learn from those comparisons.

8.2 Maintaining customer satisfaction

We will carefully monitor and evaluate our impact on the sector in a range of ways. We will ensure that there is a clear system for maintaining a regular contact with clients, which is appropriate to their stage of development. We will use benchmarking and surveys to test the growth and confidence of the sector.