



BUSINESS PLAN 2022 – 2024

December 2021

Contents

1. Executive Summary.....	4
2. Introduction.....	8
3. Strategy.....	11
4. Strategic Priorities.....	12
5. Policy Priorities.....	13
6. Our Activities.....	15
a. Representation, communications and engagement.....	15
b. Research and Policy Development.....	16
c. Growing Markets and Working with Others.....	16
d. Good Governance.....	17
e. Financial and Environmental Sustainability.....	17
7. Transition Planning.....	19
8. Staffing, Structure and Performance Management.....	19
a. Personnel Resource.....	19
b. Performance Management.....	21
c. Governance.....	21
d. TUPE considerations.....	24
e. Financial Management.....	25
f. Marketing and Communications.....	26
g. Risk Management.....	26
9. Financial Forecast.....	Error! Bookmark not defined.
10. How we will Fund our Activities.....	26
a. Background.....	26
b. Breakdown of SES income 2021 – 24.....	Error! Bookmark not defined.
c. Membership.....	26
d. Events.....	26
e. Publications/Products.....	27
f. Contracts for Social Enterprise Related Services.....	27
g. Other Sponsorship.....	27
11. Our Commitment.....	28
12. Appendix 1 – Social Enterprise Scotland Strategy 2022-2026.....	29

13.	Appendix 2 - Transition Plan	30
14.	Appendix 3 – SES Consultation Summary 2021	32
15.	Appendix 4 – Our Activities.....	33
	a. Representation, Communications and Engagement.....	33
	b. Research and Policy Development	41
	c. Growing markets and working with others.....	48
	d. Good governance (See section 8c).....	52
	e. Financial and Environmental sustainability.....	53
16.	Appendix 5 – Social Enterprise Scotland, Articles of Association	61
17.	Appendix 6 - Social Enterprise Scotland – Marketing and Communications & Digital Engagement Outline	62
18.	Appendix 7 - Risk Register	Error! Bookmark not defined.
19.	Appendix 8 – Financial Projections 2021-2024	Error! Bookmark not defined.
20.	Appendix 9 – Membership Fees Analysis.....	Error! Bookmark not defined.

1. Executive Summary

Social enterprise in 2022: the world we find ourselves in

Social enterprise as a world-wide movement finds itself at a critical juncture. It has been buffeted by the Covid-19 pandemic, which has caused many social enterprises to adapt their business models as they sought to survive an unprecedented shift in economic circumstances. This has shown **their agility, imagination and resilience**. As the economy recovers, we are confident that social enterprises are well positioned to take advantage of new markets and new opportunities, especially those which focus on wellbeing, equality, fairness, and sustainability, rather than just 'economic growth'.

Context

The Scottish Government's (SG) Social Enterprise Action Plan 2021 – 24 (SEAP) sets out the ambition to ensure that social enterprise plays a greater role in civic society and in Scotland. Social Enterprise Scotland (SES) is committed and driven to enable this to be achieved by working collaboratively with partners to deliver the priorities outlined in the SEAP. We understand SG are looking for a strategic partner to support the broad-church of social enterprise, acknowledging the diversity within the social enterprise movement. SES are the only intermediary with a proven track record of delivering for organisations across the diverse spectrum of business models and legal structures.

Our Strategy

The strategy for SES, see appendix 1, has been shaped and informed by our engagement with the social enterprise movement in Scotland and experience of best practice models across the world. SES has developed capacity that meets the needs of a diverse and inclusive social enterprise ecosystem in Scotland. We have, in recent years, strategically grown our membership and developed our financial resilience which has ensured that SES has remained credible and relevant to our members, community and our collaborative partners.

Our Vision

Our vision is that social enterprises are, and have proven to be, crucial to forging an agile Scotland and are a **valued and vibrant part of the Scottish economy**, making a significant contribution to a sustainable and vibrant net zero economy and increasing wellbeing, diversity and reducing inequality in Scotland.

Our Mission

Our mission is to **ensure SES amplifies the voices of social enterprises in Scotland**. We are the organisation where social enterprises come to be represented and supported and where public, private and third sector organisations go to engage with social enterprises, to create opportunities for partnership, and investment.

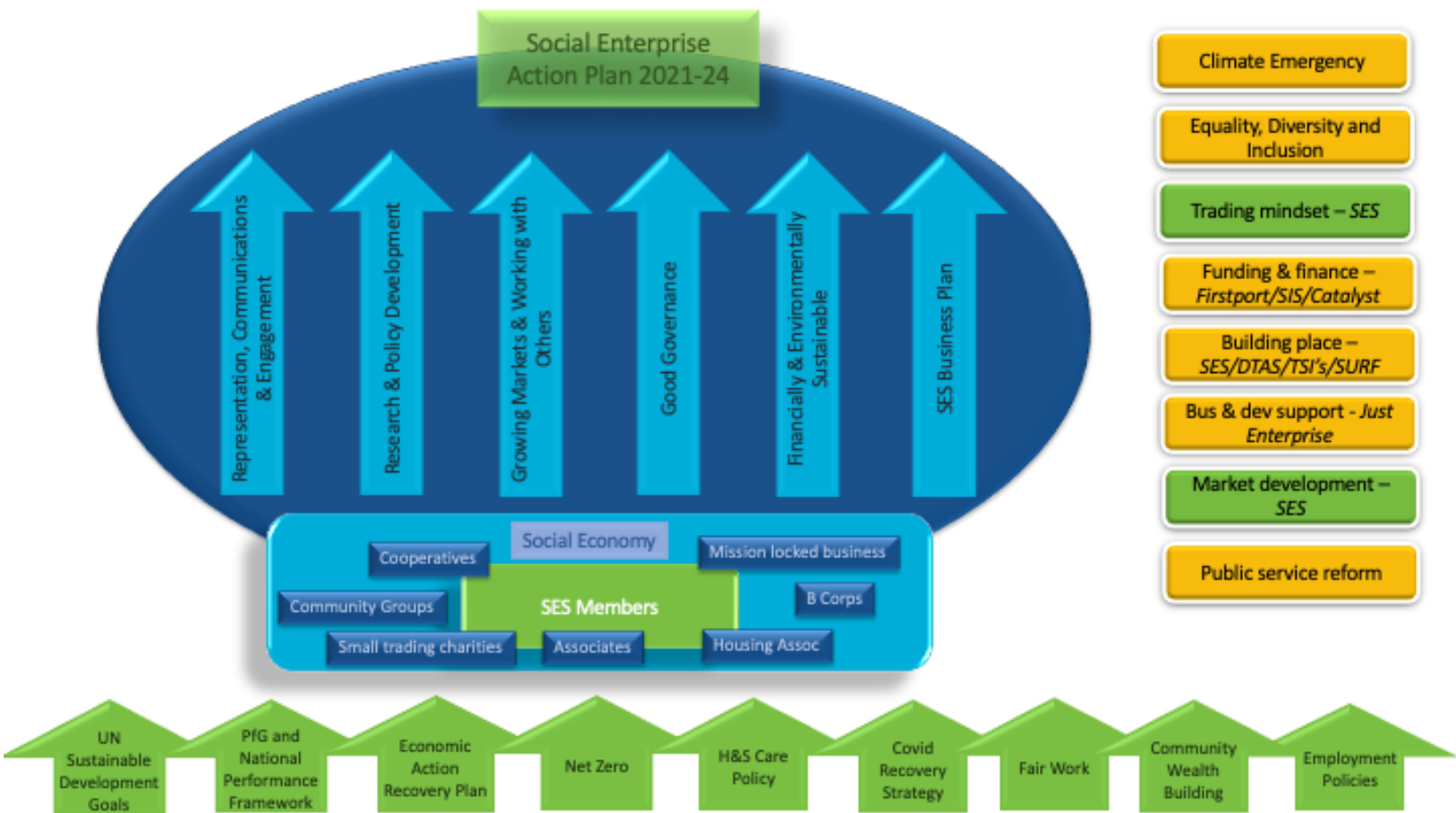
Our Business Plan

SES have prepared this detailed business plan, which demonstrates financial resilience and an income growth plan to detail how we deliver our operations from the launch (operational start) of the new single intermediary in July 2022 onwards for the following two years.

This business plan is framed in our overarching organisational strategy for 2022 – 2026. To deliver on our objectives, we focus on our mission to amplify the voice of social enterprise in its diversity, develop our policy and campaigning work to influence government, its agencies and the private sector, realise climate change ambitions and identify a just transition path to net zero; develop markets and place a greater emphasis on co-design and developing a credible evidence base to support the movement's key messages.

Our approach is to be innovative and agile, an inclusive single intermediary body that collaborates across partnerships. This ensures that the diversity of the social enterprise movement can flourish and create impact.

The single intermediary model as outlined to meet the criteria in the SG application pack is illustrated by SES below. Our diagram of the operating, financial and policy environment, with key stakeholders and partners, is captured in the diagram produced and set out in this picture.



The First 100 Days

SES understand there may not be full acceptance within the whole movement of a single intermediary, and we want social enterprises to be assured we will work, positively and respectfully, with the existing ecosystem to support a smooth transition to a single intermediary. We see this as an opportunity for Scotland to reclaim the title of one of the world's most coveted ecosystems that represents the diversity of Scottish social enterprises and into the international arena. We understand that there will be a transition period from the point of the panel's decision in early 2022 to July 1st, 2022, however we want to set out how we will approach the first three months as the single intermediary. See appendix 2 for more details.

We will democratise the voice of social enterprise, ensuring we capture the diversity of the movement and ensure social enterprises have an equal voice. We understand the nuance of voices and acknowledge that we will never get everyone to agree on everything all the time.

However, we will lead pragmatically, working with social enterprises to understand the broad direction of travel; informing policy levers and building markets to ensure the

landscape is conducive to empowering social enterprises to thrive. SES will identify a key contact within the single intermediary to act as an interface to the Enterprise Agencies, TSIs and SENs, building on the local networks, where appropriate and ensuring they are agile, effective, and fit for purpose for the modern, social enterprise landscape. We will provide quarterly joint Continuing Professional Development opportunities to understand social enterprises' needs and contextualise them for the local areas. Early engagement has demonstrated that the current ecosystem partners will work constructively and collaboratively with whichever partner organisation that is chosen.

SES will help social enterprises to reach their full potential and support networking and national level influence with five high level guiding principles to deliver the outcomes and business plan. These are:

- Having a high profile with social enterprises, government and its agencies and the private sector;
- Achieving sustainable financial interdependence in the long-term;
- Developing and using a robust evidence base;
- Building existing markets for social enterprises such as housing and health and social care and developing new market areas such as the green economy; and
- Building positive and collaborative relationships with other intermediaries and not competing with our members and supporters.

Our business plan includes a detailed process which we will undertake following the award of funding which will ensure a proactive and rigorous transition plan. We will embed fair and transparent recruitment processes; positive and engaging partnership development and all activities will be carried out in a spirit of good-will to ensure the social enterprise ecosystem's interests are recognised, first and foremost.

SES will build on our strong financial basis and grow our existing capacity to meet the demands of the very diverse social enterprise movement and to capitalise on the opportunities presented in the current environment. This includes both our staff resources and Board members. We will also build our membership to ensure we are inclusive, and remain credible to the movement and external stakeholders. SES will build bridges, and develop in a realistic and sustainable way so that we are able to deliver our long-term goals.

We will consult widely and evolve our governance structure to ensure we are effectively able to balance accountability with inclusion and diversity of the social enterprise movement, our members, and funders.

Our model is premised on:

- building on ensuring the continuation of existing service offers across the social economy;

- consulting with stakeholders across the ecosystem to understand their needs, building on research already undertaken;
- enhancing the partnership collaboration across the movement through a co-design approach to service delivery; and
- recognising the delivery elements currently provided by SENScot and identifying areas for transition where appropriate.

SES will continue to focus on what it does really well, demonstrating to the movement and other stakeholders that we can make a positive impact for them and build our financial sustainability through creating a diverse income base.

This business plan sets out a flexible, agile, and responsive approach to how we will make progress in the key areas, recognising the significant economic uncertainties that still prevail. It provides the rationale for the development of SES's annual work programmes.

With that context in mind, the senior leadership team, in conjunction with the Board, will spend the first 100 days working to focus by:

- Investing in our culture, systems, knowledge, and skills to better meet the needs of social enterprises; and
- Make more data-driven decisions and building appropriate digital tools.

Moving forward, over the next 6 months we will unite these priorities by producing a comprehensive digital transformation strategy that looks at what we need to do to develop our own digital capacity and in turn better support the needs of social enterprises.

- We will explore how SES can further develop its systems, knowledge, and skills to better meet the needs of our users, including:
 - People and culture: Identifying and addressing skills gaps and embedding a culture of enterprise;
 - Data and insights: Identifying a roadmap towards data maturity.

2. Introduction

This business plan outlines our operational activity for years 2022/23 and 2023/24 to deliver our strategy for SES. It informs our response to the process put in place by SG to identify a single intermediary to support social enterprises in Scotland over the next two years from July 2022.

The business plan deals with our overall programme for this period, which includes funding through the potential grant of £417,000 from SG and in addition to that, from other, self-generated, revenue sources. We have identified the specific activities that will be funded through SG funds in the relevant sections of the business plan and in the financial section.

The business plan is informed and influenced by recent SG research into social enterprise (and, in particular, the review of social enterprise intermediaries in November 2021), our own on-going research and 360-degree review carried out by SES in 2021, which included over 30 deep-dive consultations with members and stakeholders as well as all staff, the SES Board and social enterprises themselves. See appendix 3 for more details.

The business plan outlines how we will achieve the objectives set out by SG, over the next two years and our own path to sustainability as an organisation. It shows how SES can support social enterprises and be representative of the whole movement in all its diversity and make an impact in tackling inequalities across Scotland.

Social enterprises have undoubtedly been disproportionately affected by the impact of the Covid-19 pandemic. Many social enterprises, who relied on trading income, lost this overnight. It is testament to the resilience, embedded within their DNA, that we saw social enterprises adapt their business models as they sought to survive an unprecedented shift in economic circumstances. This has encouraged many social enterprises to show agility and resilience. As the economy starts to recover it gives us confidence that social enterprises are well positioned to take advantage of new markets and opportunities as well as contributing to SG objectives and targets.

All of this reflects the fact that social enterprise has always been a broad-church with many different business models and that we need to reflect, encourage and lead this diversity rather than seeking to constrain it. For example, our 2021 consultation has shown that many younger social entrepreneurs see themselves running businesses that meet both *needs and markets*, with less emphasis on structures and definitions. See appendix 3.

This business plan is based on **optimism** about the prospects for social enterprise and **realism** about the practical steps we can take to extend the scope and reach of individual social enterprises as they drive to meet their own aspirations as businesses.

In the future we have a vision for a movement that is ***diverse, resilient, more sustainable and has a significant impact in tackling inequalities***. One that has a different economic shape to reflect the business opportunities, where the social enterprise business model has a competitive advantage over more traditional approaches such as in housing, social care and financial services to those on low incomes. This will enable the social enterprise movement in Scotland to remain at the forefront of international developments.

What do we mean by a social enterprise?

Social enterprise is a ***mission driven movement*** underpinned by a business model which has a number of characteristics. We identify with the commentary provided by the Social

Enterprise World Forum (SEWF)¹. Using the standards outlined by the SEWF we understand a social enterprise to be driven by six principal characteristics:

- Mission driven;
- Surplus is invested in the mission;
- Ownership is tied to the mission;
- Trading generated income;
- Transparency and ethical behaviour; and
- A lock on assets to ensure residual assets are used to further the organisation's mission on dissolution.

We see this as a ***practical, working definition*** which reflects the broad consensus within social enterprises and potential social enterprises.

¹ <https://sewfonline.com/about/about-social-enterprise>

3. Strategy

Our strategy for SES is underpinned by our Theory of Change model.

Theory of Change

This framework, illustrated below, demonstrates how we will meet the requirements identified by SG to serve the social enterprise movement by providing the functions of a successful, single intermediary, this process enables us to:

- Identify our long-term goals;
- Through backwards mapping and connecting outcomes, identify the immediate actions required;
- Create an outcomes framework to describe and quantify this;
- Identify our assumptions in delivering this;
- Developing indicators to measure our progress; and
- Identify the interventions we need to make (and the resources we need to deploy).



4. Strategic Priorities

Our role as a single intermediary is to build on our strong operational and financial position in supporting social enterprises:

1. To represent the growing social enterprise movement and articulate its diverse needs and the impact it makes;
2. To make the case for supporting social enterprise to investors in both the public and private sectors;
3. To influence policy and create a supportive environment for social enterprise;
4. To develop new markets (both consumer and B2B) where social enterprises can create and sustain a competitive advantage;
5. To support individual social enterprises and contribute to their success through:
 - a. Creating and supporting open connections;
 - b. Facilitating investment opportunities;
 - c. Sharing best practice;
 - d. Signposting social enterprises to the most effective support for their business needs;
6. To create an evidence-base to demonstrate the value of social enterprise; and
7. To position social enterprise as the business model of choice for those seeking to reduce inequality and create a fairer Scotland.

All of these priorities sit within the umbrella of SG policy priorities and we are fully aware of the need to engage social enterprises with how their business model can drive change on social inclusion, inequality, poverty, diversity and environmental sustainability.

5. Policy Priorities

This business plan outlines the activities which will support the delivery of the current policy drivers for the social economy in Scotland. Social enterprises in every community, across both urban and rural Scotland, are working to achieve, sometimes inadvertently, the goals within The Scottish Government's National Performance Framework (NPF). SES works with social enterprises to both align with and influence the NPF; including raising the profile of the NPF, what it is and does, how it fits within the social enterprise movement and opportunities for social enterprises to get involved.

We recognise and understand that there is an ongoing challenge involving social enterprise and third sector voices within mainstream economic strategies and policies. Therefore, in addition to the Social Enterprise Strategy 2016 – 2026 and associated action plans we influenced all the recent major wider policy frameworks and will continue to do so, including the Scottish National Investment Bank, The 10-year National Strategy for Economic Transformation and the Social Renewal Advisory Board process.

We will continue to engage with other wider policy frameworks, in particular moving towards building a wellbeing economy and community wealth building, both policy initiatives that should directly involve the social enterprise community.

Social enterprise is a broad movement that covers many sectors of the economy, including health and social care; early years provision; housing; criminal justice; economic regeneration and other significant aspects of our economy. All aspects of the NPF are relevant to social enterprises we support and we are committed to ensuring they influence these various policy agendas now and in the future. The key ones we have identified are:

- **Children and Young People - We grow up loved, safe and respected so that we realise our full potential.** According to the Social Enterprise Census 2019 (Census 2019), 26% of social enterprises had "Supporting children in their early years" as a main objective, driving their profits to this kind of support;
- **Communities – We live in communities that are inclusive, empowered, resilient and safe.** Most social enterprises would subscribe to this objective as part of their core purpose, focussing their efforts on community regeneration and supporting people, from mental health to social care, housing and more;
- **Culture – We are creative and our vibrant and diverse cultures are expressed and enjoyed widely.** 816 social enterprises, 14% of the total, work specifically in arts and the creative industries, according to Census 2019 and we are committed to engaging with them and assisting their development;
- **Economy – We have a globally competitive, entrepreneurial, inclusive, and sustainable economy.** Building inclusive and sustainable local economies is a core purpose of all social enterprises, through ethical trading, innovation and supporting

- excluded groups of people. This is directly related to the NPF objective of Poverty; we tackle poverty by sharing opportunities, wealth, and power more equally;
- **Environment – We value, enjoy, protect, and enhance our environment. The main purpose of social enterprise is to bring about social and environmental change.** As the climate emergency takes hold many social enterprises exist as green social enterprises. 28% have “Protecting or improving the environment” as a core objective, according to Census 2019. SES understand the gravity of this challenge and we will lead the movement in greatly improving the understanding and environmental impact of all enterprises;
 - **Fair Work and Business – We have thriving and innovative businesses, with quality jobs and fair work for everyone.** SES are increasingly and actively involved in this agenda, ensuring that all social enterprises are fair work employers and indeed are the leaders in this agenda. 75% of all social enterprises pay at least the real living wage, according to Census 2019; and
 - **International – We are open, connected and make a positive contribution internationally.** Scotland is a world leader in social enterprise development and the ecosystem has a very positive international representation thanks to the foundation of the Social Enterprise World Forum and Scotland’s International Social Enterprise Observatory. We are committed to building even stronger connections with SEWF and ISEO and to empower more social enterprises to trade and influence internationally.

The SG SEAP has three central themes, which are aligned with achieving these policies:

- Stimulating social enterprise;
- Developing stronger organisations; and
- Realising market opportunities.

More directly there are specific deliverables that we, as a single intermediary will undertake to align with the SEAP; namely:

- Create the conditions where place-based social enterprise activity and communities can flourish, through enhanced promotion, developing capacity, and funding. Make sure social enterprises have the tools, knowledge, and pathways to connect into wider SG policy around Community Wealth Building and Thriving Place;
- Continue to support social enterprise networks as well as other forms of business mentoring, coaching, and peer-to-peer learning; and
- Increase the number of enterprises that use digital tools to support learning and development.

6. Our Activities

This business plan outlines the activities outlined in the application criteria:

- Representation, Communications and Engagement;
- Research and Policy Development;
- Growing Markets and Working with Others;
- Good Governance; and
- Financially and environmentally sustainable.

SES has identified in detail for each key criteria identified by SG for the single intermediary, the following:

- Objectives;
- Where we are starting from;
- What we do already;
- What we will do;
- Route map of how we intend to get there; and
- Goals and Targets for Years 1 and 2.

Full details are in appendix 4.

The business plan also ensures Equality, Diversity & Inclusion (EDI) and Climate Sustainability as cross cutting themes throughout SES activities. SES ensures diverse and inclusive approaches, and the business plan shows how SES will support the ecosystem to demonstrate its impact on tackling inequalities. These cross-cutting themes:

- Will be considered across all of SES's internal and external work and processes;
- Will always seek to articulate the good story social enterprises have to tell in both areas more prominently;
- Will always seek to raise the bar across the social enterprise movement to continue to be the best of business in both areas.

a. Representation, communications and engagement

Objectives

- Support connections and collaboration between social enterprises and key statutory bodies;
- Create meaningful relationships with the private sector at the national and local level;

- Represent the social enterprise movement at a national level and influence policymaking on its behalf;
- Build on existing local and thematic networks, ensuring they are inclusive and strengthening links across all geographical areas;
- Promote and give space to the multitude of differing voices and opinions in the movement without seeking to develop a single “representative voice”;
- Build bridges across the diversity of the movement in all its range of legal forms;
- Work positively and collaboratively with other SG supported intermediaries both locally, nationally and internationally.

b. Research and Policy Development

Objectives

- Support all Scottish social enterprises by promoting best practice and demonstrating social impact, support research and evaluation, and provide information and advice, signposting, when relevant to partner organisations;
- Provide data and hard evidence on the movement based on quality research, analysis and engagement to enable deeper understanding of its needs and potential;
- Create a high quality, dedicated research function in partnership with respected external organisations such as Glasgow Caledonian University (GCU) and the Fraser of Allander Institute (FAI).

c. Growing Markets and Working with Others

Objectives

- To support social enterprises to access current market opportunities, provided by both public sector procurement and through private sector supply chains in order to grow their businesses and make them more sustainable;
- To support social enterprises to access new and future market opportunities such as the green economy and changes to health/ social care provision;
- To support new ways of investing in social enterprises to empower them to scale;
- To find practical ways to partner and collaborate with those who share our values and aspirations for social enterprise and who want to invest in it;
- To develop new partnerships where they are needed;
- To develop better ways of working with the private sector and its intermediaries such as the Federation of Small Businesses (FSB).

d. Good Governance

Objectives

- Social Enterprise Scotland leads as an exemplar of best practice with governance that is democratic, inclusive, transparent, diverse and equitable;
- We will democratise the voice of social enterprises, ensuring one enterprise has one voice;
- We will develop a Board that represents the social enterprise movement at the national and local level, making sure that all voices can be heard, especially those of smaller organisations;
- We will develop a Board that is professionally competent and has the appropriate skillset to manage the organisation and offers both leadership and challenge to the movement;
- We will lock the core purposes of the organisation into our Articles ensuring that the movement is inclusive and remains a broad-church.

e. Financial and Environmental Sustainability

Financial Resilience

Objectives

- SES is clearer than ever on its ability to both be good at business itself, with improving quality across the board, and to broker business opportunities for Scottish social enterprises, without having to compete with its own members;
- SES will set an example as a social enterprise raising trading income to match fund the SG grant ensuring that additional resources are maximised for the benefit of the movement;
- To ensure we are sustainable, membership fees need to form a greater proportion of SES's overall income. The SG Intermediary Survey told us that 85% of social enterprises were willing to pay a nominal cost to join an intermediary that advocated for them at a national level. We will introduce a £100 flat fee for all social enterprises, generating additional income for the year 2022/23 and 2023/24 onwards;
- In addition to fees raised from social enterprise members, we know that many private sector businesses want to support the social enterprise movement and we will engage with them to do so;
- We want to both build and diversify our funding base through events, corporate sponsorship, contracts and building on Buy Social;
- We want to shift our income mix from one centred around a core government grant to a more diverse mix of earned income, contracts, consultancy work, corporate partnerships and membership.

The pending financial crisis facing the country, due to the pandemic, may affect SES in a variety of ways: it may further increase the need to diversify our own finances and become more enterprising; it may require us to be more creative in how we support social enterprises; and it may affect demand, and flow, for our service delivery and support.

We must evolve to better meet diverse social enterprise needs and adapt to a smarter future of work featuring primarily digital service delivery. Through the period of Covid-19, we have listened to and amplified the voices of social enterprises. We will continue to use our knowledge, learning, experience, and position to influence the wider support infrastructure as well as government, and its agencies, on the needs and opportunities.

Environmental Sustainability

Objectives

- As an organisation SES seeks to be a leader on sustainability and to embed the principles of working towards Net Zero in what it does and in the support and advice it offers to social enterprises.

We will quantify SES' carbon footprint (baseline) for the key carbon emissions that arise from energy use at the organisation's offices in Edinburgh, business travel throughout the UK and international destinations, and other emissions where SES has indirect control, such as employee commuting.

Using this carbon baseline, the aim is to then identify realistic carbon reduction actions to 2030 for those emissions quantified, to build a Net Zero roadmap. Developing a Net Zero strategy and roadmap is an iterative process that reflects changes in the organisation, working practices, technology and stakeholder needs over time. Therefore, it is essential to ensure the initial roadmap focuses on the areas with the greatest impact while working within realistic timescales and the resources available at present.

Importantly, as a values-led organisation, SES wants its Net Zero strategy to connect to its stakeholders and social enterprises by aligning to its core values of acting in a sustainable and responsible way that transforms communities and embraces diversity and inclusion.

7. Transition Planning

SES recognises that the award of grant funding to only one of the existing intermediary organisations will potentially have a considerable impact on the other.

Our aim from the immediate point of announcement to both parties will be to ensure that at all times we engage directly with the SENScot team, both Board and staff, in an open, transparent and constructive manner.

We have identified a phased activity programme, Transition Plan, see appendix 2, which summarises the key actions we will undertake. This Transition Plan has three phases, phase 1 from date of award to 1st July 2022, phase 2 the First 100 Days, and phase 3 on going delivery and final review July 2024.

In developing our staff team to deliver the expanded service we sought legal counsel and are fully apprised of any potential TUPE considerations. We will ensure that our recruitment process is clearly articulated and in accordance with our recruitment policy. This ensures our recruitment reflects diversity in all its elements and will be open, fair and transparent. It is assumed in our financial forecasting that TUPE will not apply to the award of this grant from SG however we commit to ensuring that we will assess any, and all, necessary obligations on behalf of SES in delivering this business plan. Key to our approach to developing our resource team will be to work together with SENScot to ensure we deliver in “good spirit”, for the good of the ecosystem and staff. We fully commit to the principles of SG’s Fair Work First approach and adopting the approaches outlined.

8. Staffing, Structure and Performance Management

SES is committed to delivering on the Fair Work First principles to the maximum extent possible as touched upon below.

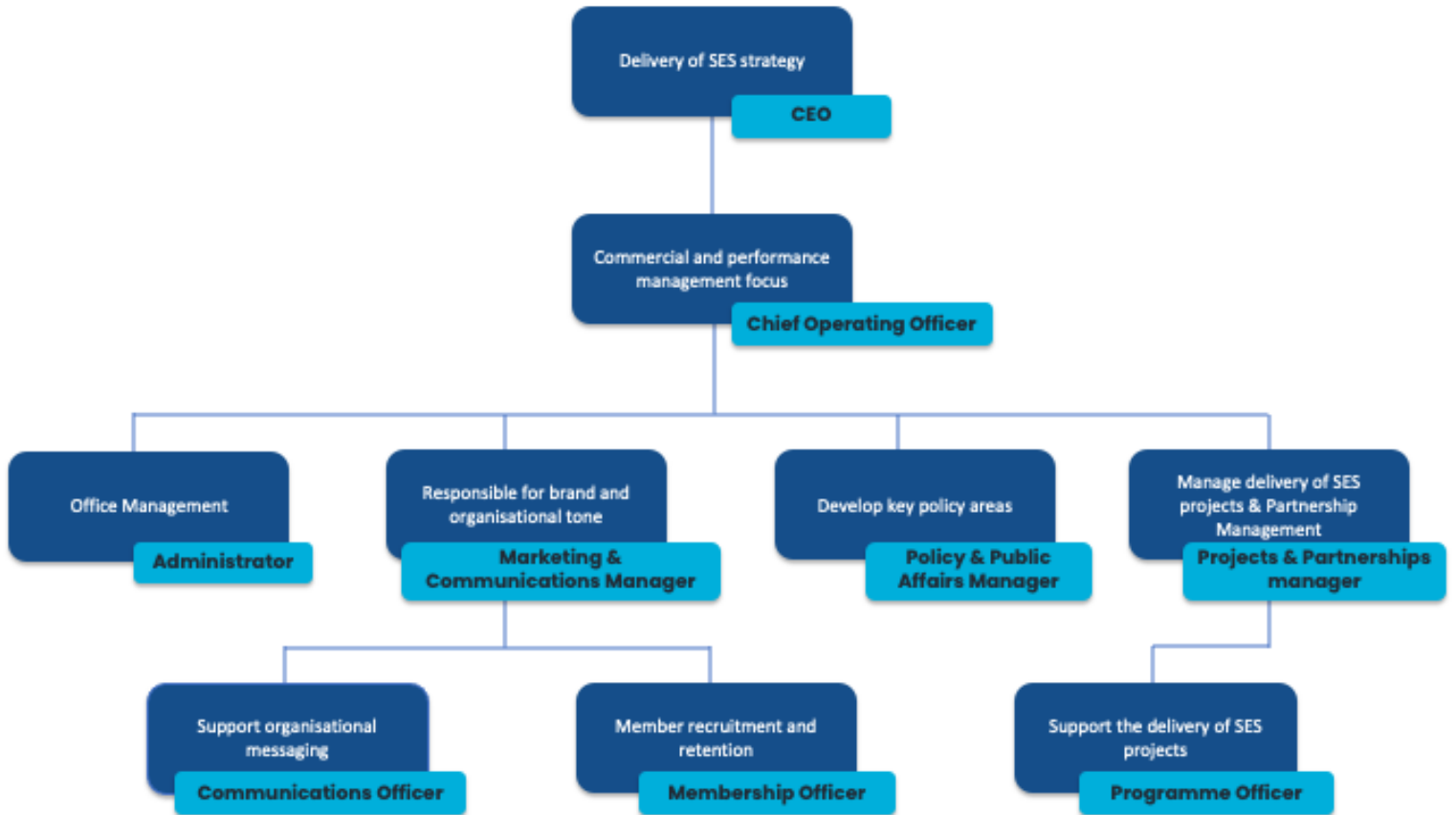
a. Personnel Resource

SES has an experienced staff team and has defined a logical team structure geared towards delivering on our objectives. This is illustrated below and is the basis of our budget projections.

SES is committed to there being no inappropriate use of zero-hour contracts and oppose the use of fire and rehire practices and confirm we have not relied on such contracts in the past.

Our current staffing structure comprises 4.5 full time equivalent (FTE) posts. The structure is fit for purpose from a governance perspective currently. We are in the process of recruiting

an Interim Chief Operating Officer in early 2022 to be ready to support the delivery of the transition phase following award of the grant funding. Our CEO will focus on the overall long-term aspects of running SES, delivery of SES strategy and stakeholder management while the COO's focus will be on the current operations and financial status of the organisation as well as performance management of the team. During this period, we will be recruiting a further 3.5 FTE and, with existing support from external staff, will ensure SES has the capacity to deliver the outputs set out.



In terms of investment in workforce development we currently support the continuous improvement of an effective team with an organisational culture that follows our core values and operating principles. SES will invest in developing what it has to offer staff (both financial and developmental, including well-being) and in ways of working that harness the knowledge, skills and commitment of the team. This will require investment of time and resources in staff development alongside the use of appropriate working practices. We are in the process of finalising our refined HR policies and processes ahead of a 2022/23 launch with a view to not only identifying action to tackle the gender pay gap and create a more diverse and inclusive workplace but also offering flexible and family friendly working for all workers from day one. Practical examples of this include implementing a Work from

Anywhere policy which enabled staff to see loved ones, when restrictions allowed, and not have to lose annual leave. All policies were developed following extensive consultation with our staff team, providing an appropriate channel for an effective staff voice and identification of good practice in organisations both within and out with the social enterprise movement seeking to harness some of the positive lessons we learnt whilst adapting to the Covid-19 pandemic.

b. Performance Management

The ToC approach will be embedded in the organisation and will be used to drive the output measurements and subsequent assessments of outcomes. This will enable us to cascade performance measurement throughout our team in addition to sharing with our external stakeholders including funders and investors.

We will monitor our performance frequently at individual, team, Senior Leadership Team, and Board level. We will use our identified key performance indicators as the basis for all of our reporting. We will develop appropriate reporting formats which present our performance fairly and with clarity so that all staff and Board members understand the successes and challenges and the impact that they have upon these.

c. Governance

We recognise the importance of a democratic and representative governance whilst still ensuring the structure needs to empower the organisation to be agile, efficient, and effective. We commit to representing the breadth of social enterprise activity and will, for example, seek a referral from the Community Enterprise's "Accelerate" programme to join our Board to understand the needs and perspectives of the charities who recently started to trade.

To create a more diverse and inclusive Board we will recruit representatives for young people, people with disabilities, Black and Minority Ethnic founders, and geographical representation from across the country, to ensure an understanding of the context of operating a social enterprise in rural, island and remote communities. Additionally, we will offer SG an observing role on our Board. We are keen that our relationship with SG is dialogical and we understand that the flow of intelligence is two-way. During the transition period it is imperative that the new single intermediary has legitimacy and is endorsed by the Scottish Government. We feel this partnership approach will send a positive message to the social enterprise movement of collaboration and continued support. SES will implement a Board Skillset and Representation Matrix which will be reviewed quarterly to ensure our governance is always fit-for-purpose.

What we do already

The organisation undertook a comprehensive governance review in 2016 which led to a significant re-engineering of the Board; we can appoint a Board of up to 14 directors. The Board will create a new consultative steering group of regional ambassadors, established to support the ambition of being member-led, open and transparent about our way of working and to ensure accountability. Our Board currently consists of 8 members who are elected at our AGM for an initial 3-year period of office. Our Board is diverse, with representatives from urban and rural social enterprises, large and small organisations, with 62.5% being female and 50% from known minority groups; we are currently discussing a number of alternative models with stakeholders and members, ensuring we democratise the voice of social enterprises.

Consequently, the Board is undertaking a governance review to establish what has worked well and what future changes might need to be considered to ensure the organisation's governance structures and rules enable the Board to lead the social enterprise movement in Scotland; is representative in terms of geographic, thematic and type of social enterprise and that it remains as diverse as the sector that it advocates for. Whatever structure we decide on will be done collaboratively, with our members and partners, and in the best interests of the social enterprises themselves.

Should the Board recommend changes to the current Articles of Association, see appendix 5, an EGM would be required to enable members to choose to adopt such recommendations. It is anticipated that the evolution of the organisation and Board mechanisms will continue to evolve to ensure good governance can continue. SES currently publishes annual reports that benchmark the organisation with social and environmental criteria alongside the financial reporting as well as the 'what we did' narrative.

What we will do

- Ensure we are a representative body that democratises the process, ensuring every social enterprise has an equal voice;
- Improve the professional skills of the Board to bring in those with skills which will be important to delivering the business plan, for example, marketing and branding, digital expertise and private sector connections;
- Commit to good governance recognising it is also about being transparent about our impact and effectiveness as an organisation;
- SES will continue to publish annual reports that benchmark the organisation with social and environmental criteria alongside the financial reporting as well as the 'what we did' narrative;
- In addition, we will publish open information on pay ratios (including gender pay gap reporting), median rates of pay, our policies regarding fair work principles, living

wage, internships, procurement, and publish a diversity audit of staff, Board and ambassadors.

What we want to do in Year 1:

- Our drivers are to become an exemplar model for social enterprises and raise a minimum 50% of income through trading, retaining our existing asset lock. We decided not to pursue charitable status nor to become a Community Interest Company. We want to democratise the voice of social enterprises, ensuring one enterprise has one vote;

We have sought legal counsel and with the above in mind, we anticipate the optimal “structures” being either:

- a company limited by guarantee (as present); OR
- a cooperative registered society. (We discounted charitable structures, CICs and vehicles associated with business for profit)

At this point we propose that SES will stick with the “shell” of its existing company limited by guarantee if successful, for a variety of reasons, not least to reduce complexity of change. However, we do commit to implement an overhaul of the Articles considering either an “all embracing whole movement (6000) membership” OR moving away from “formal corporate membership of the 6000 but using a mechanism to achieve representation from across the movement; and in either scenario above, enhance the Articles to enshrine good governance and representation.

- Ensure organisational processes are fit for business delivery and development with improved use of data collection / CRM system;
- Leverage a better understanding of our social media audiences for membership growth. Start to segment the census list by size of enterprise, industry, and region and develop an engagement and recruitment strategy to grow our membership size, with the establishment of a new CRM software to manage contacts, engagement and communications and marketing effort.
- Review and develop our approach to membership to better articulate values to prospective and current members.

Our target will be:

- To implement a bespoke CRM that reaches all social enterprises irrespective of geography and size, ensuring accessibility, that we are leveraging as we move forward with engagement and recruitment efforts;
- To coordinate quarterly training with all staff members to ensure CRM is used to full potential and that information is shared across the organisation to benefit social enterprises;

- The Board will also create a new consultative steering group of regional ambassadors, established to support the ambition of being member-led, open and transparent about our way of working and to ensure accountability. We will find suitable influential contacts who can act as ambassadors for geographic regions and help us collect insights on the ground to help a down-top approach to local initiatives;
- To evidence of a range of thematic ambassadors that we can collect insights and needs from.

In year 2 we will:

- Embed further our Theory of Change process;
- Commission an additional impact report which will be more complex than assessing the impact of a front-line delivery organisation. Evidencing cause and effect is very challenging at a secondary tier level and frequently SES is operating at a tertiary level adding to the complexity of metrics required to have a robust and credible impact report. However, we are committed to impact reporting and believe that this approach will strengthen the organisations performance in future years;
- Our target will be to have a benchmark for social impact measurement of SES;
- We will collect data in line with framework and top-level indicators for use in our annual review during the following year;
- Our impact report will be published in October 2023 once the accounts have been accepted by the Board.

Members of SES's Board play a key role in setting the strategy for the organisation, reviewing progress against objectives, and ensuring that the organisation meets its statutory obligations. They act legally as company directors, as ambassadors for SES and the social enterprise movement and provide support to the Senior Leadership Team.

SES will maximise the valuable contribution that the Board can make and invest resources in ensuring that the Board and staff team continue to share a common vision for SES.

d. TUPE considerations

It is assumed in our financial forecasting that TUPE will not apply to the award of this grant from SG. However, we will ensure that we are fully apprised of how, and when, it may apply following award. We commit to ensuring that we will assess any, and all, necessary obligations on behalf of SES in delivering this business plan. This will include a transparent and open recruitment process to build our enhanced staff team, acknowledging appropriate TUPE requirements as appropriate.

Key to our approach to developing our resource team will be to work together with SENScot to ensure we deliver in "good spirit", for the good of the sector and staff and we will

certainly not take a narrow view on the application of TUPE and look to protect the interests of those individuals involved in current service delivery wherever possible and work with all stakeholders in line with the spirit of TUPE where appropriate.

e. Financial Management

SES has financial procedures in place which are reviewed on a monthly basis. SES's annual budget and cash flows provide the basis for financial reporting to the Board on a quarterly basis and detailed accounts are also scrutinised by the Board on a quarterly basis.

SES has put in place a risk register and we review this quarterly.

SES is financially resilient. There are significant cash reserves and SES has diversified income streams. This is through work in the last five years to create trading activities, membership income and sponsorship. SES has had a Reserves Policy to hold 3 to 6 months' worth of costs as reserves.

This enabled us to cope with the shock of the pandemic and we can continue to plan to operate with confidence as the Board, suppliers, funders and staff can see the financial foundations are solid. We are balancing priorities, outcomes, and forecasts, managing risks and ensuring good financial management. SES will continue to develop its financial management capacity, devoting time and resources to fundraising, financial management, investing in opportunities and maintaining reserves.

- We see improving financial sustainability as a central aim over the next two years. If we want social enterprises to aspire to sustainability, we must demonstrate that we can lead by example;
- We want to shift our income mix from one centred around a core government grant to a more diverse mix of earned income, contracts, consultancy work, corporate partnerships and membership;
- SES wants to set an example as a social enterprise raising trading income to match-fund the Scottish Government grant ensuring that additional resources are maximised for the benefit of the movement;
- This will include raising more income from membership fees and private sector sponsors;
- We have prudently established reserves to enable us to meet our liabilities, meet cash flow strains, have funds to absorb a temporary shock to our income and invest in new ideas without having to seek new funding sources.

f. Marketing and Communications

Building on our plans, we will develop a detailed communication and marketing plan, including comprehensive brand guidelines. This will ensure that the most appropriate communication tools and methods are used to meet the wide array of organisations engaged in the social enterprise movement. See appendix 6 for more details.

g. Risk Management

We will build on our Risk Register to ensure that we can constantly be aware of potential challenges to our aims and operational delivery, mitigating the risks as appropriate. See appendix 7 for more details.

9. How we will Fund our Activities

a. Background

SES derives its funding from a mix of sources, including grants, trading activity (notably events), sponsorship and membership fees. A major part of SES's funding up to this point has come from two funding sources, a Scottish Government grant from the Third Sector Division and membership fees.

b. Membership

To be sustainable, membership fees need to form a greater proportion of SES's overall income. For this period recruitment targets will be set to increase the number of SES members and membership revenue, both in absolute terms and as a proportion of SES's operating costs. This will ensure the organisation is less reliant on SG income, supporting SES to become a sustainable organisation.

In appendix 9, we propose projections for social enterprise members at a flat £100 fee. (SG intermediary survey said 85% of those surveyed were happy to pay an administrative fee for joining the single intermediary). We have projected a membership of an additional 158 members in the first year which we believe is achievable however we understand not every member will have capacity to pay therefore we will offset these memberships against corporate sponsorships.

c. Events

Currently, SES's revenue derives from events, and we generate around 12% - 25% of total revenue from this source (caveated in the fact that 12% was the lowest it has been in 3 years

given we were unable to host 'in-person' events throughout the pandemic). We will build on the success of our event portfolio by building in additional events, which will allow SES to increase the share of revenue generated through trading. As this is SES's major source of unrestricted income, any new events will be expected to make a significant contribution to overheads and generate a surplus to increase SES's reserves.

d. Publications/Products

SES has income-generating publications in the pipeline and we would expect to publish a number of new products each year. Each project will create additional revenue for the organisation in addition to raising the profile of Scottish social enterprises.

e. Contracts for Social Enterprise Related Services

SES will diversify its income through securing contracts for services. In the first instance we see opportunities particularly with private sector contacts. Additionally we see an avenue to engage with other government departments and other public bodies, who are increasingly working on social enterprise issues and require a basic grounding in the issues affecting the movement.

SES has signed an agreement for the license to use the SEUK's Buy Social Brand and intellectual property in Scotland. We believe that by raising the profile of the brand in Scotland we will increase our membership in addition to introducing social enterprises to new markets. We will engage big businesses in the Buy Social Corporate Challenge and now have a formal commitment from the business sector to spend £1M with social enterprises in this financial year. We have an agreement with SEUK to report on an aggregate spend with social enterprises across the U.K.

f. Other Sponsorship

By increasing its portfolio of events SES increases the sponsorship opportunities available from other organisations. We expect to generate sponsorship tied to particular products or activities. An example of this is Social Enterprise Places Programme for Scotland scheme; we have secured sponsorship for an initial three years from NatWest/Royal Bank of Scotland to match-fund Scottish Government investment and roll-out an additional 7 places that become a tourist route for inbound visitors to Scotland who want to visit social enterprises. We will signpost them to pockets of social enterprise activity that has regenerated local communities across the country. Further opportunities will be investigated, building on existing relationships with partner organisations and additional revenue streams through People's Postcode Lottery.

10. Our Commitment

SES is an organisation that embeds innovation, diversity and agility in all its planning and activities. This is essential in delivering within an extremely diverse community of organisations and stakeholders.

Our most recent example of this is the co-creation with First Port to deliver the Catalyst Fund, through the setting up of a joint venture, Impact Investment Partnership Scotland Limited. SES built on our relationships within SG to bring in additional revenue for the movement by establishing a Social Enterprise Growth Fund, a new joint venture that will focus on investing in high growth potential social enterprises whose plans and/or stage of development are not suitable for traditional social investment.

The venture was designed and developed over Autumn 2020, through an initial investment of £15 million from SG and we launched early in 2021, making 4 initial investments before the end of the calendar year. Our projections show the Fund raising an income for SES in Year 4 thus diversifying our income streams to further ensure we become a sustainable organisation.

SES has a long, proven track record of listening to and supporting social enterprises. We are committed to being a trusted partner for social enterprises and those who wish to invest in them as the business model of the future. Our staff and Board are knowledgeable and experienced. We will bring independent expertise to the task of helping social enterprises grow and contribute to increased wellbeing, diversity, fairness and equality in modern Scotland.

11. Appendix 1 – Social Enterprise Scotland Strategy 2022-2026

See file attachment "Appendix 1 Strategy 2022 - 2026 "

Action	Who	2022											2023		
		Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Recruitment process to expand Board	CEO/Chair SES														
Approve Marketing/Communications plan	CEO/Board SES														
Single body funding commences	ScG					mid June									
Initiate Marketing/Communications plan	CEO SES														
Development of Governance structure	CEO/Board SES														
Consult with Members on Governance structure	CEO SES														
"First 100 Days" Delivery	CEO SES														
Implement revised Governance structure if required	CEO/Board SES														

13. Appendix 3 – SES Consultation Summary 2021

In the autumn of 2021, SES commissioned a piece of work to consult over 30 stakeholders, as well as a sample of members on the key issues for social enterprise in Scotland and the role that could be played by SES in advancing them. The main points were:

- There is a good fit between the needs of the post Covid-19 economy and the strengths of social enterprise. The model is increasingly relevant;
- SG needs to know where it gets value for money from its intermediaries and how to turn policy aspirations into practical actions;
- There are opportunities for:
 - Female entrepreneurship;
 - Digital/technology led growth;
 - Social finance; and
 - Trust-based service.
- This will require:
 - Better branding and marketing;
 - Access to risk capital;
 - Digital evolution; and
 - Better collaboration.
- Younger social entrepreneurs are more enthused by business opportunities and tackling social problems than structures;
- SES should look to the places where there is energy and enthusiasm. Social enterprise is a movement, not just a business model;
- There is a positive view of SES and its staff and a willingness to accept its leadership as long as it seeks to find common ground;
- SES needs to work across SG departments, including those dealing with enterprise and regeneration; and
- Members want support on access to capital, access to markets and getting into procurement pipelines.

14. Appendix 4 – Our Activities

a. Representation, Communications and Engagement

Objectives

- Support connections and collaboration between social enterprises and key statutory bodies;
- Create meaningful relationships with the private sector at the national and local level;
- Represent the social enterprise movement at a national level and influence policy-making on its behalf;
- Build on existing local and thematic networks, ensuring they are inclusive, agile and effective; strengthening links across all geographical areas;
- Promote and give space to the multitude of differing voices and opinions in the movement without seeking to develop a single “representative voice”;
- Build bridges across the diversity of the movement in all its range of legal forms; and
- Work positively and collaboratively with other SG supported intermediaries both locally, nationally and internationally.

As part of our business planning there was a clear message that membership was the area that needed investment and prioritisation. SES will continue to develop and improve its membership recruitment, retention and quality of service through targeted investment (in line with staffing capacity) and continuing development of key areas. There has been significant progress in recent years, and this business plan seeks to capitalise and build on that work substantially.

The organisation is seeking to continue to improve its account management of members, and its data collection – both through annual member surveys and through use of our CRM to log interactions more consistently. Alongside this, more assertive marketing and reciprocal deals (with regional and specialist bodies) will seek to increase the quantity of membership and, in particular, focus on growing SES geographical spread.

Two other areas will continue to be central to membership strategy: Led by the social enterprise movement – this approach is starting to develop but will be expanded by industry and geography in the course of the next financial year. Improved use of CRM, alongside data coding, is helping develop this online and more low-cost networking events and other activities will help to do so offline. Both are crucial to creating a vibrant organisation for all social enterprises that always has social enterprises at the forefront of its work.

Brokering business opportunities – SES has successfully increased the number of opportunities it is brokering directly to members, either through the Buy Social Scotland campaign or through consultancy and other opportunities. This will remain a priority, as the most valuable thing SES can do for social enterprises is help build the markets for their services and help them win some of that business.

We will continue to host the Social Enterprise in Scotland Awards which is a key part of proving and promoting the movement. We intend to build on this year's event and will offer a hybrid event with digital access to ensure engagement from across the whole of Scotland.

Where we are starting from

- In the last year we have increased our membership by over 50% to 507 enterprises. The majority are smaller social enterprises who do not engage with existing local networks;
- In 2020/21 we published 25 press articles with a further 40 press articles published in the launch of our Buy Social Scotland Consumer project;
- In the last 15 months, we promoted weekly blogs (56) featuring a variety of voices representative of the diversity of the movement;
- We have published three Covid-19 reports since April 2020, a Digital Showcase and our Annual Awards Nominees brochures (Nov 20 and 21), We recently launched our 'Uist Places' brochure (Nov 21) capturing the benefits of becoming a Social Enterprise Place;
- In the last 15 months, 1,402 attendees attended our weekly webinars;
- In addition to these webinars we have held a variety of virtual promotional events including our Social Enterprise Places launch (63 attendees), Social Enterprise 2020 Digital Showcase (124 attendees); our Annual Awards event in November 2021 (with 129 attendees) and were headline partners in SE Futures celebrating the best of the social enterprise movement across the U.K. and Northern Ireland;
- In 20/21 our CPG events saw 186 attendees over 3 sessions;
- Our Buy Social Scotland Bootcamps saw 315 consumer sessions and 98 attendees at Corporate Challenge sessions. 59 participants attended our Corporate Challenge launch event. 100% of participants found the sessions at least "Very Valuable" with a staggering 57% telling us they found the sessions "Extremely Valuable". We also asked participants if they would value additional business support (resources, webinars, practical tips) to use marketing and communications more effectively in order to promote their social enterprise to consumers'. 33% of respondents replied, "Extremely Valuable" 42% of respondents replied "Very Valuable" and 21% of respondents replied "Somewhat Valuable"; and

- 105 MSPs signed our pledge to support social enterprise leading up to the Holyrood elections.

What we do already

Communicating and Networking

- 'Digital' has moved beyond using the right tools and now defines our primary way of interacting with our network, as well as running the business. Issues around diversity and inclusion have been amplified, both through the different social and global crises as well as a direct result of our own D&I work, and the strategic commitments we've made. As we have done with Diversity and Inclusion in 2020, we hope to share learnings, build partnerships, and help raise the profile of SES as we go. Over the past year, SES has made significant progress in our commitment to Diversity and Inclusion, engaging with a working group, implementing a dedicated D&I strategy and making significant improvements in our ways of working. We have played a key role in stimulating and supporting change within the wider movement and made 3 strategic commitments:
 - strengthening our Board to ensure we are listening to voices from a diverse range of backgrounds;
 - building relationships with Scotland's more diverse communities;
 - influencing a more diverse social enterprise ecosystem.
- Over the next 6 months, our focus will be on embedding D&I in the wider strategy to create a more sustainable impact and focus on D&I moving forward. This will include:
 - ensuring D&I training is incorporated into our induction and training;
 - updating policies and procedures to reflect new practices;
 - identifying key diversity and inclusion objectives, milestones or targets.
- Our following on social media across Twitter, Facebook, LinkedIn and Instagram is much larger than our membership. We have over 34,000 followers across those channels and our name and website help us act as a point of entry for those who are interested in social enterprise in Scotland. 31,000 unique visitors accessed our website this year, browsing 198,000 pages of content. For a comparative reference point, SURF has just over 4,200 followers on Twitter and Facebook and its website has 22,065 users with 49,125 page visits last year;
- We engage with a wide range of stakeholders with weekly meetings and information exchanges to share insights, collect information and signpost to key initiatives across business support, learning and training, funding and events;
- We share our events on social media via our weekly email bulletin and weekly dedicated emailers to our 5,700 email subscribers across segmented lists;

- We curate content with partner stakeholders who take part in our weekly webinars to introduce social enterprises to topics from across the social economy as well as initiatives directly relevant to them;
- We are recognised as the authoritative voice in Scotland to gain insights from the social enterprise movement and, as such, we were invited to speak at key events across Scotland and the UK throughout the year including Scotland: The Recovery 2021; CCS (formerly CRNS) Annual Conference, SE Futures, CEIS Social Enterprise Policy and Practice Conference and giving evidence to Scottish and U.K. Government's relevant Committees. Our broad-church perspective ensured we could give an overview where other intermediaries couldn't; and
- We co-create content (brochures, press and media articles, blog posts) in partnership with stakeholders as well as members and associates and share views from the movement to amplify the voice of social enterprises.

Representation and Policy

- We established the Social Enterprise Cross Party Group (CPG) and the Social Enterprise Local Authority Group (SELAG) in order to ensure social enterprises' voices were heard by local and national decisionmakers. We reached out to ecosystem partners to help contribute to identify themes however SES acts as Secretariat for the CPG and Chairs the SELAG events throughout the year to connect with policy influencers, share views and exchange information;
- We are active in regular conversations with Scottish Government representatives and partners that influence policy, projects and funding;
- We used our influence to work with SG analysts, academic institutions and regulatory bodies and played a key role in framing early planning for the Third Sector Resilience Fund and the subsequent Adapt and Thrive Fund. We continue to help shape policy agendas by working with SG and partners on steering groups, for instance on the SEAP/Social Enterprise Census Group; and
- We regularly share insights, initiatives and case studies from the movement with MSPs, local authority councillors and public sector contacts through regular consultation responses, dedicated emailers, and policy campaigns. For instance, 'Get Your Voice Heard' which aims to transform the perspective on policy engagement for social enterprises, or the Social Economy Pledge which saw 105 MSPs commit to recognising and supporting the movement ahead of the 2021 Scottish Parliament elections.

Geographical links

- SES has members throughout urban and rural areas in Scotland, and a good representation of members across all Scottish regions. This has increased since the pandemic with an increased need from social enterprises to connect and

- network with each other and the multiplication of our online initiatives both for social enterprises;
- Key national programmes, for example Buy Social Scotland and Social Enterprise Places, have been open and accessible to all social enterprises across Scotland and we actively pursue engaging social enterprises with equitable geographical representation in mind. Social Enterprise Places in particular, has been successful in the Highlands and Islands and areas where there were no local Social Enterprise Networks (SENs), highlighting the needs of these areas for greater integration, engagement and support. The Social Enterprise Places initiative in particular, has been a positive way for us to engage with TSIs, third sector organisations and social enterprises in rural and island communities, for instance in Uist, where we collaborated with CoDel Scot to develop an [online brochure](#) demonstrating what makes the area a social enterprise hotspot and promoting the profile and work of 17 local social enterprises. This was well received, with organisations including the Development Trusts Association, Foundation Scotland, Highlands and Islands Enterprise, the Scottish Community Alliance, the Scottish Rural Network, Smart Islands, the Social Enterprise Academy and Visit the Outer Hebrides championing it; and
 - SES has not sought to duplicate existing regional networks but we have regular engagement with local SENs and Third Sector Interfaces (TSIs) as well DTAs and SCVO. We will improve these links and formalise partnership working through discussions and consultation if selected to be the single intermediary. We will build on the existing networks ensuring inclusivity is a core value and encourage the inception of additional networks in areas that are not currently covered by existing SENs. We will work with Scotland's Economic Agencies to ensure representation and develop a mechanism of intelligence sharing that is agile and efficient.

Multitude of Voices and Legal Forms

- From our name to our content creation, co-creation and curation, to the range of initiatives we deliver; from webinars to Buy Social Scotland, networking events and the stakeholders we partner with across the third sector, SES and its team has truly reflected the diversity of voices, interests, and needs of a movement which is complex and diverse;
- Our approach has been to offer a national point of contact and engagement for all social enterprises, whether they are members or not, and we acknowledge and support a 'broad church' view of the social enterprise movement, in alignment with the Social Enterprise World Forum characteristics that were cited earlier. This allows us to provide an overview of the wider movement and we believe we are the only organisation with a track record of delivery for the breadth of the movement;

- We actively listen to different voices from the movement, not just the loudest, or best resourced, and help them articulate their needs. Our aim is to increase active participation, especially from smaller businesses;
- We have developed strong links with mission-led partners including Wellbeing Economy Alliance, SCDI, Scotland Can B, Can Do Scotland, FirstImpact, SIS Ventures, SCDI and SURF; and
- We also invest Senior Leadership time in holding annual one-on-one calls and in-person visits with our members to stay up to date to their needs and collect insights that we can share with partners and stakeholders and inform our strategy and initiatives.

What we will do

Communicating and Networking

- We will establish ourselves as the main gateway for people interested in social enterprise in Scotland. The key to this will be developing and enhancing our digital proposition;
- Increase quantity of membership, and improve quality of membership offer;
- We will review our website content architecture and look and feel to better address our target audiences and better signpost them to information quickly, depending on their interests, needs and problems. The effects of Covid-19 on working practices mean we will accelerate the implementation of this review;
- We receive over 300 enquiries per annum from people who need advice, both those who are interested in social enterprise as a business model and those who are already working in a social enterprise. We will provide information, training, support and events that meet the needs of social enterprises. This will help us better frame the weekly referrals we send to partners and support organisations;
- We evidence the conversations we have with partners/support organisations so we are pro-active with our partnerships and measure performance and outcomes;
- We will strengthen collaboration by hosting monthly team-to-team meetings with other SG supported intermediaries and key stakeholders. We will utilise our CRM to better understand our stakeholder management and engagement;
- We will reconvene the Sector Support Organisations Group, the Social Investment Forum, and the Sector Communications Group. All these will help facilitate increased collaboration between intermediaries across the social economy;
- We will develop further public affairs activity to promote equality, diversity and inclusion throughout the movement. In particular we will encourage the role of women, people with disabilities and Black and Minority Ethnic leaders within social enterprise; both on Boards and in senior leadership positions; and

- Finally, we want to align efforts between the Buy Social Corporate Challenge Boot Camp and initiatives that are a natural fit - with Just Enterprise for business support and with the Retail Academy for retail marketing specialised training.

Representation and Policy

- We already have strong relationships with Scottish Government contacts across a number of Directorates and have been successfully able to influence policy, but we want to be more proactive when it comes to taking part in consultations and policy initiatives, as well as to take part in joint consultations, projects and bids with public bodies and joint webinars with public agencies. With increased resources, we will be able to develop better intelligence across all types of organisations represented in the census and engage with them, in turn developing a far more granular understanding of needs, from which we can share better and more reliable insights with partners and be more effective in promoting and supporting key initiatives across the movement;
- We will seek to develop links with SG contacts in adjacent policy areas such as enterprise, economic development, health, criminal justice, and regeneration to articulate the benefits of working with social enterprises across the SG. We will highlight the fact that social enterprise is not niche across a range of portfolios. The current SEAP is very focused internally within the Third Sector Unit; however we will work across all Ministerial portfolios to recognise the contribution social enterprise makes across the outcomes of the NPF; and
- We will work with Scottish Enterprise, Highlands and Islands Enterprise and the new South of Scotland Enterprise to embed social enterprise into their economic and place-based programmes.

Geographical links

- A wider approach to representation as a single intermediary would encourage us to develop much stronger links with organisations across geographical locations, and we will develop a network of regional ambassadors who can constantly feed in local perspectives;
- We will develop stronger links with Third Sector Interfaces and co-create with them, and with local SENs, enabling local networks to be stronger, more inclusive and embedded in the national representative body; and
- We will work with national and local business organisations (Federation of Small Businesses, Scottish Council for Development and Industry, Chambers of Commerce) to enhance the opportunities for B2B collaboration with social enterprise.

Multitude of Voices and Legal Forms

- With a much larger number of social enterprise voices represented as a national body and with strong local links anchored in place principles across Scotland, we will enhance representation and participation from thematic networks. Though there are few of these today, they are a good avenue to develop insights and share dedicated initiatives and programmes from across the movement; and
- We will be thoughtful and strategic by planning in advance the content we collaborate, co-create and share to ensure the best and fairest representation of interests and needs from across the movement and take a proactive approach wherever we notice a gap between needs and support.

The route map of how we intend to get there

In Year 1 we will:

- Review and update our website, establishing ourselves as the gateway intermediary for social enterprises in Scotland, and their supporters;
- Conduct a social media audit of our followers across channels to enhance engagement with them;
- Review and update our email marketing strategy;
- Review our annual webinar calendar to look to enhance representation and diversity;
- Engage with local TSIs and relevant partners at the local level to develop enhanced mutually beneficial relationships based on trust and collaboration; and
- Use the updated picture of social enterprise in Scotland from the 2021/22 Census to explore how to better align support services and create avenues for collaboration.

In Year 1, our targets will be:

- Launch a new and updated website, prioritising enhanced key pages;
- Launch an enhanced programme of weekly webinars;
- Understand the nuances of the different voices within social enterprise and establish a segmented list of social enterprises in Scotland that we are proactively pursuing for recruitment and engagement;
- Evidence enhanced communications and partnerships with local organisations and TSIs across Scotland; and
- Evidence of discussions with wider mission-led partners and the range of ideas being explored.

In Year 2 we will:

- Actively measure needs and support satisfaction from social enterprises we refer to support and initiatives;
- Leverage our CRM to support communications and promotion of movement initiatives from SG, intermediaries and support organisations in a targeted way. Collect targeted insights, needs and feedback from social enterprises as needed; and
- Develop messaging and a campaign plan to rally the movement behind a broad-church understanding of social enterprise, highlighting the work that people deliver on the ground, the people behind the social enterprises and the benefits delivered in terms of social and environmental impact.

In Year 2 our targets will be:

- Better leverage of our email marketing lists to support initiatives other intermediaries and third sector organisations for relevant target audiences;
- Have measurable evidence of acting as a gateway to support available in Scotland for social enterprises;
- Evidence of a wider membership base with a fairer and better representation of the movement in its diversity;
- Evidence of efficient and targeted communications and engagement for initiatives and ability to collect and share targeted insights and feedback to SG, intermediaries and support organisations to inform support programmes on an ongoing basis; and
- Evidence of performance from the campaign promoting a broad-church understanding of social enterprise, to be able to move forward from definitions-based exclusions.

b. Research and Policy Development

Objectives

- Support all Scottish social enterprises by promoting good practice and demonstrating social impact, support research and evaluation, and provide information and advice, signposting, when relevant to partner organisations;
- Provide data and hard evidence on the movement based on quality research, analysis and engagement to enable deeper understanding of its needs and potential; and
- Create a high quality, dedicated research function in partnership with respected external organisations such as Glasgow Caledonian University (GCU), The Business

School, Edinburgh Napier University and the Fraser of Allander Institute (FAI). We have collaborated with all three institutions effectively, in the past year.

Where we are starting from

- As a national membership organisation, with a diverse and sizeable membership covering all business models, we have access to social enterprise expertise from every part of urban and rural Scotland. We strive to be an open, representative organisation that encourages a platform for all voices to be heard through open calls to produce policy manifestos for election campaigns, free attendance at Cross Party Group meetings (now with accessible, online access), seeking a gender balance and cultural diversity at our events and ensuring that members, both large and small, have an equal voice in every aspect of our work;
- We proactively pursue policy partnerships with organisations that have a shared interest e.g., for consultation responses and policy events. Our recent policy partnerships have included the Scottish Federation of Housing Associations, Scotland Can B, Scottish Council for Voluntary Organisations, Co-operatives UK, and Circular Communities Scotland (formerly CRNS); and
- We have identified several key policy priorities that are embedded within Scotland's social enterprise movement and align well with Scottish Government priorities.

This includes:

- Public service innovation and reform
- Community Wealth Building
- International Development
- Procurement reform
- Community Wealth Building
- Social investment and funding
- Fair Work
- National Care Service
- Scottish National Investment Bank

Our aim is to ensure that the social enterprise voice is heard within all these policy frameworks.

What we do already

- Get Your Voice Heard is our initiative to co-ordinate and record policy casework for members. We launched in October 2021 and have had five specific issues raised by members so far, with a variety of policy interventions actioned. This is in addition to the many informal policy and signposting enquiries from social

- enterprises and members of the public in our role as the open, public facing “gateway” and “one-stop-shop” organisation for social enterprises;
- We have embedded equality, diversity and inclusion within our membership, offering a variety of ways to engage and giving an equal, democratic voice to all enterprises;
 - The Cross-Party Group on Social Enterprise in The Scottish Parliament (CPG) recently re-launched the national policy forum for social enterprise, to directly connect social entrepreneurs with MSPs. Four themed meetings are scheduled each year with two or three speakers at each meeting. We are also proactively partnering with other CPGs in the Parliament that share our values and objectives to host joint meetings;
 - Our #GreenSocEnt campaign launched to highlight environmental action for social enterprises due to the profile COP26 and its legacy. We took part in regular ecosystem steering group meetings, produced a webpage of support resources, published eight green social enterprise blogs, weekly climate news items in magazine, and hosted a webinar showcasing five green enterprises contributing to environmental outcomes;
 - We were a founder member of the Social Enterprise Census steering group, helping develop the methodology and metrics and we continue to take part, including a promotional campaign for the survey and final reports. Through our independent research we have identified a high number of social enterprises not included in the dataset so we are working with delivery partners to continuously improve the methodology and understanding of what is a diverse movement.
 - We produced three “COVID-19 and the impact on Social Enterprise in Scotland” reports, using OSCR data and with individual calls to our membership, as part of a team research project.;
 - We formalised a partnership with the Fraser of Allander Institute ensuring we understand what the data tells us within the context of our Covid-19 research, allowing us to understand where the gaps are and supported delivery bodies to evidence where the money went. One of the key findings in our published report is that there were 1,293 organisations funded through the “Enterprising Third Sector” funds that did not appear on either OSCR or the Social Enterprise in Scotland Census 2019 dataset;
 - The University of Edinburgh, and Glasgow Caledonian University (GCU) are members of SES and we promote their research and build relationships with their teams. We have a contractual agreement with GCU to facilitate access to social enterprises by their research team, and to help publicise findings. Our commitment to the project involves the provision of desk space for GCU researchers; supporting the research team to gain access to our members through making connections; publicising the value of the research to our members and encouraging them to take part; and helping disseminate findings

- from the project through our newsletters, meetings with policy makers and via our Very Connect platform;
- We have been an active member of the Third Sector Research Forum helping to translate messaging to social enterprises who don't instantly relate to the third sector. The information gathered from the social enterprises informs and directs SES and partner organisations, such as SG, provide support to the movement.
 - We have relationships with all of Scotland's key think tanks, who all receive our monthly policy and research briefings;
 - We launched the Social Economy Pledge ahead of the Holyrood election, working with SCVO and other partners. We had a target of 100 election candidates and succeeded in attracting support from 105. Follow-up emails were sent to successful candidates. A summary blog of the five main party election pledges was produced for members;
 - We have used the intelligence from engagement with social enterprises to inform a plethora of consultation responses - Recent Scottish Government consultation responses include National Strategy for Economic Transformation, the National Care Service (Health and Social Care Alliance response), a green recovery and the Scottish National Investment Bank, promoting the social enterprise voice in key policy areas. Our approach is now to form a temporary steering group of social enterprises and support bodies, to inform responses, in addition to the general consultation response open to any social enterprise;
 - We provide intelligence and highlight information for MSPs, civil servants and local officials. We founded the Social Enterprise Local Authority Group (SELAG) which hosts quarterly meetings to inform local authority officers, facilitate learning and knowledge exchange and host guest speakers;
 - We are considered the authoritative voice for the breadth of the social enterprise movement, not representing a single voice and, as such, have given oral evidence to Scottish and U.K. Parliament committees on several occasions in the last 18 months;
 - We proactively contacted all new MSPs post-election and held meetings and provided information, when Members specifically requested them and we are in regular contact with MSPs through and outside of the Social Enterprise CPG and have provided information for policy and debates;
 - We have provided information for official parliamentary SPiCE briefings;
 - Mainstream media recognise SES as their conduit to the social enterprise movement. We are asked to write for The Scotsman each month with articles and policy updates, highlighting key policy topics such as climate change, equalities, and public service reform. Additionally, BBC Scotland conducted an interview with our CEO discussing ethical and sustainable gift giving at Christmas time;
 - We host a weekly #WednesdayWebinar on a range of key policy topics, often aligned to policy blogs, consultations and current opportunities and challenges for social enterprises, including fair work, links with housing associations and

- exploring shared values with mission-led businesses, plus our regular “Finance Focus” sessions of funding opportunities;
- We are a lead partner in the "Third sector joint messaging group". This is to explore, for the first time, how we can collaborate with partners to deliver a joint public and media campaign, to raise the profile of social enterprises and the voluntary sector across Scotland; and
 - We are leaders in a wide range of influential policy forums, including The Scottish Government and ecosystem Social Enterprise Strategy group, the former Social Renewal Circle, Third Sector Research Forum, Social Enterprise Census steering group, Social Enterprise Local Authority Group (SELAG).

What we will do

- **Increasing policy influence.** We will seek to grow the influence of the social enterprise movement by ensuring we are right at the heart of all mainstream economic thinking. Working with government, private sector bodies and policy institutes to get the social enterprise voice heard and ensure we are always at relevant forums and at the centre of all mainstream policy initiatives. This includes working with partners at the international, national and local level. We would include a complete review of our current stakeholder management processes to develop more strategic policy influence;
- **Developing policy specialisms.** We will ensure that the social enterprise voice is fully heard across different sectors, including health and social care, the green economy, tourism, sport and culture. We will build on national thematic policy networks to improve grassroots engagement, so that all social enterprises are aware of how to get involved in their area of interest at a national level. We will empower social enterprises and demonstrate how they can influence and change policy. We will build a database of case studies from across different social enterprise sectors to bring policy issues alive;
- **Digital engagement and policy.** We will build on and enhance our digital platforms and projects. Our weekly webinars and events, online surveys, social media and online membership forums, with VeryConnect, Zoom and other platforms, will be reviewed and improved. We will take a partnership approach with ecosystem colleagues and seek to work with e.g. Social Shifters. We would prioritise those living in rural and remote areas and those with additional needs;
- **Co-ordination of ecosystem research to provide hard evidence.** We will co-ordinate ecosystem research as a “one-stop-shop”, working with grassroots social enterprises and the government to understand research needs. We will build on our existing academic, think tank and research institute partnerships to drive

forward innovative, significant research that will inform policy changes. This will ensure high quality, independent research that has integrity. We will make better use of polling companies as vehicles for collecting robust evidence;

- **Be a "bridge" organisation for research** by developing links between different research projects that overlap data e.g., the Social Enterprise Census, Third Sector Interface data and Scottish Council for Voluntary Organisations research. We will also fulfil this role by bringing together cross-sectoral research with private, public, and academic sector colleagues. We will have a key role as facilitator of discussions with relevant organisations around research. We will continue to link with others who support social enterprise research e.g., the Scottish Federation of Housing Associations and OSCR;
- Develop more formal links with a small number of academic institutions and think tanks such as Glasgow Caledonian University, Fraser of Allander Institute, and the David Hume Institute;
- **Census extra.** We will make better use of the Social Enterprise Census data and look at the potential for further in-depth studies, to go beyond the headline figures and analyse key sectors within the survey; and
- **Research budget.** We recognise the importance for research, and we will allocate funding to support high quality research, building of existing partnerships with academic institutions, ensuring adequate sample sizes and access to the broad-church of social enterprise activity.

Route map of how we intend to get there

Overall goals and objectives

1. Closer partnership working with ecosystem organisations to ensure there is a clear evidence base for strengthening social enterprises;
2. Developing a nuanced communications strategy integrated with the overall ops plan understanding the range of voices contributing to the social enterprise movement; and
3. Developing policy positions and communities of interest with a member-led approach to policy and programmes in partnership with other partners.

In Year 1 we will:

- Conduct a full review of all stakeholder management processes and utilise our CRM, with the aim of driving the social enterprise policy agenda;

- Convene a meeting of research partners to discuss a more formal collaborative mechanism to drive social enterprise-related research;
- Reconvene the Social Investment Forum to ensure social investment works for the movement;
- Review our policy engagement strategies that allow all social enterprises to get their voices heard in policy influencing; and
- Formalise our referral process with other support intermediaries and third sector support organisations.

Our targets in Year 1 will be:

- We will host bi-monthly meetings with key policy-related stakeholders, to build relationships at all levels of each organisation;
- We will host a quarterly forum with research partners to bring coherence to social enterprise-related research;
- We will signpost all new social enterprises to access and navigate social finance, and to make it accessible and appropriate; and
- Specifically, we will develop existing digital forums, to ensure they are accessible, and consider new tools, as well as engaging social enterprises in events to get involved in policy influencing.

In Year 2 we will:

- Seek to develop new and existing thematic policy forums, both local and national, to ensure social enterprise can influence in all policy areas;
- Build on the Social Enterprise Census by reviewing what additional research projects could be undertaken; and
- Be part of a more expansive, inclusive, and dynamic social economy movement, as part of our policy and campaigning approaches.

Our targets in Year 2 will be:

- Target local authority membership to allow SES to allocate a specific resource to supporting local intelligence;
- Arrange monthly meetings (partnering with local SENs, TSIs and SELAG) to bring together officers from different local authority departments (housing, procurement etc), to educate and raise awareness;
- Working with research partners, in a planned new research partnership structure, we will launch an additional, periodic research project, as part of Census Extra, that social enterprises have identified as the most important to them; and
- Partner with organisations in the wider social economy around specific, regular joint annual campaigns e.g., SCVO for the traditional charity sector and Scotland

Can B and SCDI for the private sector, increasing public awareness and embedding social purpose throughout the economy.

c. Growing markets and working with others

Objectives

- To show leadership and support social enterprises to access current market opportunities to grow their businesses and make them more sustainable. These opportunities include those provided by public sector procurement and through private sector supply chains;
- To show leadership and support social enterprises to access new and future market opportunities such as the green economy and changes to health/ social care provision;
- To show leadership and support new ways of investing in social enterprises to empower them to scale;
- To find practical ways to partner and collaborate with those who share our values and aspirations for social enterprise and who want to invest in it. To develop new partnerships where they are needed; and
- To develop better ways of working with the private sector and its intermediaries such as the Federation of Small Businesses (FSB).

Where we are starting from

We champion social enterprise through several campaigns:

- Buy Social Consumer - the website has 199 social enterprises listed and to date 295 products/experiences have been listed;
- Buy Social Corporate – the website has an additional 164 products/services;
- Glasgow Caledonian University, Gleneagles Hotel, Crieff Hydro Hotel, Robertson Group, PwC and Morrisons Construction plus others signed up to Corporate Pledge committing to a £1M spend through social enterprises as part of the recovery from Covid-19;
- Launched the Social Enterprise Places Programme for Scotland adopting 3 new places initially within the cohort; and
- We also signpost over 300 enquiries from social enterprises to specialist business support every year

It is important to understand all of this was achieved despite the Covid-19 pandemic. We know the movement is predominantly made up of small organisations, sometimes with the capacity of a single founder and their Board. Social Enterprises saw the merit in

aligning with the Buy Social Scotland brand which opened markets for them and allowed them to trade their way out of an economic downturn.

What we are doing already

All our work enables us to champion social enterprise and to get social enterprises, especially smaller businesses, in front of audiences that they lack the capacity to reach.

- We produce a key statistics document that has all key media statistics and data from the Social Enterprise Survey following our 2020 campaign;
- We have also collaborated with Social Investment Scotland to link the Buy Social Scotland site to the existing Retail Academy directory;
- We launched a LinkedIn campaign to raise the profile of Scottish social enterprises. This involved sharing our Corporate Challenge Brochure with background information/case studies/assets which will lead to additional private sector organisations signing up to the Corporate Challenge pledge. We are currently working directly with Crieff Hydro Hotel, Morrisons Construction, Glasgow Caledonian University, PwC, Gleneagles Hotel, University of Edinburgh, The Royal Bank of Scotland, Deloitte, BAM Nuttal and the Robertson Group. We are pursuing ongoing engagement with Social Value Portal about alignment within Their construction sector and social procurement site;
- Aligning Buy Social Scotland with U.K. and global initiative - Robertson Group and PwC are already also part of SEUK campaign;
- Planning the SES Trade fair - SES runs a biennial trade fair and conference. Most recently our Marketplace event held in Glasgow 2019 where 80 social enterprises showcased their products and services in the Royal Concert Hall and sold to over 500 purchasers;
- We have booked a stand at Procurex (now running March 2022). We plan to bring in social enterprises to collaborate on the stand and are negotiating a speaking slot;
- Connecting with BASE network about supported business and potential collaboration;
- We are currently working with NHS Lothian and NHS Tayside and Scotland Excel about Buy Social Scotland. There is a market to offer training days to the public and private sector presenting the benefits of engaging with a social enterprise supply chain which will help them report on their ESG targets. We believe this will provide reciprocal benefits for the attendees, our social enterprises in Scotland as well as diversifying our income streams at SES. Through this delivery we now have links with construction companies aligned with their framework for spend over £1M to seek to work with social enterprises;
- Informed procurement consultations with relevant intelligence and connections with Local Authorities through the SELAG group;

- Created a stakeholder engagement map as a marketing/management tool;
- We host monthly calls with all three Enterprise Agencies;
- Engagement with all TSI's onboarding them with Buy Social Scotland;
- Over 300 referrals each year to Just Enterprise and First Port;
- We currently receive referrals from TSIs and SENs up and down the country; we know the support is not at a consistently high level across the country and we will contextualise our approach where there is a deficit. We know SENs don't exist in every local authority area and there is a gap in the Highlands and Islands and we will work with HIE and the TSIs to ensure a consistent and equitable approach; and
- Referrals to Highland Islands Enterprise, South of Scotland Enterprise and the Business Gateway.

What we will do

- Establish formal partnerships with local Chambers of Commerce;
- Onboard Associate Members on the Corporate Challenge Pledge and have dedicated resources to build private sector supply chains relationships;
- Align all Buy Social marketing across North America (U.S.A. and Canada); Europe and the rest of the U.K. increasing market visibility for Scottish social enterprises looking to trade internationally;
- Grow existing links with business umbrella bodies to open up new markets e.g., Business in the Community Scotland, CBI Scotland, Scottish Chambers, S.C.D.I. and F.S.B.;
- Establish formal mechanisms to engage with the Enterprise Agencies around practical actions on procurement and aligning business support;
- Collaborate with like-minded movements for doing business better such as B-Corps;
- Improve our stakeholder management and have dedicated stakeholder engagement across all sectors; and
- Utilise SES strategic partners and associate members through a pro bono advice portal covering insurance/HR/legal/back-office functions.

Route map of how we intend to get there:

Overall goals and objectives

- Social Enterprise Places Programme for Scotland – we plan to build on the SES Places programme with more Places coming on board, local events (digital), web and PDF brochure resources;
- Buy Social Consumer – we will produce regular blogs, onboard additional social enterprises and products to add and deliver targeted paid for ad campaigns on behalf of the movement – building on our festive campaign; and

- Buy Social Corporate Challenge – We are working with 10 Corporate Partners, establishing a new B2B Buy Social Scotland website and hope to run a Corporate Challenge Bootcamp.

In Year 1 we will:

- Integrate Buy Social Scotland in existing business support frameworks;
- Continue to work strategically with regional / ecosystem partners to make social enterprise movement coherent;
- Open up greater opportunities in the private & public sectors for social enterprises;
- Onboard social enterprises to the Buy Social Scotland directories;
- Record aggregate spend from Corporate Challenge Pledge partners and produce an annual report;
- Attend Procurex and build relationships with procurement consultancies; and
- Develop blogs on supplier focus promoting social enterprise offerings and buyers - align with case study releases.

Our targets in Year 1 will be:

- Integrate Buy Social Scotland with one or several key partner organisations offering business support and training;
- To launch an additional 7 Social Enterprise Places – raising awareness and cross-sector support for social enterprise;
- Onboard 30 Associate Members to the Corporate Challenge;
- Produce 6 more social enterprise case studies re social enterprises and supply chain (bimonthly);
- Produce 6 Corporate Challenge Pledge partner case studies (bi-monthly);
- Make 10 presentations to potential Buy Social supply chain buyers;
- Aim to increase Corporate Challenge Partner spend with social enterprises by 10% per annum;
- Collect feedback from Corporate Challenge partners to inform support/training needs by social enterprises; and
- Ensure social value is used by local authorities, central government and housing associations to ensure commissioning and procurement provides opportunity for social enterprise.

In Year 2 we will:

- Have integrated Buy Social Scotland with one or several key partner organisations offering business support and training;
- Produce a video highlighting social enterprise suppliers and corporate buyers;

- Run a marketplace event promoting social enterprises to private sector buyers; and
- Convene a Consumer-Facing Social Enterprise Steering Group.

Our targets in Year 2 will be:

- Have scaled engagement with Buy Social Scotland with more social enterprises;
- Have launched a pro bono service for social enterprises, linking our members with our Associates who have offered a bank of hours to support the movement;
- 800 buyers attending the Social Enterprise Exchange Marketplace; and
- Publish a report emphasising the change in consumer behaviour and highlighting the opportunities for social enterprises.

d. Good Governance (See section 8c)

Objectives

- Social Enterprise Scotland aims to be an exemplar of good practice with governance that is democratic, inclusive, transparent, diverse and equitable;
- We will democratise the voice of social enterprises, ensuring one enterprise has one vote;
- We will develop a Board that represents the social enterprise movement at the national and local level, making sure that all voices can be heard, especially those of smaller organisations;
- We will develop a Board that is professionally competent and has the appropriate skill-set to manage the organisation and offers both leadership and challenge to the movement; and
- We will lock the core purposes of the organisation into our Articles ensuring that the movement is inclusive and remains a broad-church.

What we do already

SES will support our employees in new ways of working and flexible and family friendly working practices: Working from home has always been available at SES, however uptake was always sporadic, and staff felt they needed to justify why and when both to themselves and each other. Covid-19 and lockdown has shifted our attitude and mindset towards working from home. By participating in what became a mandatory pilot, we have proven to ourselves and those we work with that working from home and delivering services digitally is possible and productive. This isn't about neglecting the office or only providing digital services, but by having a staff centric approach we can create a much more credible perspective of the future, and offer staff a fresh, smarter and more satisfying approach to work.

Over the next 6 months we will:

- Research, understand and consider less traditional working practices, for example, adopt a 4-day working week, unlimited annual leave etc;
- Review and refine our HR policies, staff handbook and contracts and ensure staff are aware of and can benefit from the changes;
- Reflect on our office and home working practices and identify the strengths and weakness of both;
- Engage with staff to understand their priorities, fears, and aspirations, assuming we face a future living and working alongside Covid-19;
- Develop a phased plan for returning to the office (in whatever guise that may be), ensuring that what happens next takes these reflections and engagements into account, is balanced and meets needs; and
- Consider how collaboration and partnership working can be forged and how we play a meaningful role in collaborative office space.

Crisis always presents an opportunity and the opportunity available to us is to adapt as an organisation, engage in smarter and less traditional ways of working, be more agile and encourage staff to prioritise other areas of their life while not devaluing the role and contribution work makes to life and identity.

e. Financial and Environmental sustainability

Financial Resilience

Objectives

- SES is clearer than ever on its ability to both be good at business itself, with improving quality across the board, and to broker business opportunities for Scottish social enterprises, without having to compete with its own members;
- SES wants to set an example as a social enterprise raising trading income to match fund the Scottish Government grant ensuring that additional resources are maximised for the sake of the movement;
- To ensure we are sustainable, membership fees need to form a greater proportion of SES's overall income. The SG Intermediary Survey told us that 85% of social enterprises were willing to pay a nominal cost to join an intermediary that advocated for them on a national level. We will introduce a £100 flat fee for all social enterprises, generating additional income for the year 2022/23;
- In addition to fees raised from social enterprise members, we know that many private sector businesses want to support the social enterprise movement and we will engage with them to do so;
- We want to both build and diversify our funding base through events, corporate sponsorship, contracts and building on Buy Social; and

- We want to shift our income mix from one centred around a core government grant to a more diverse mix of earned income, contracts, consultancy work, corporate partnerships and membership.

What we are doing already

- We source funds from a mixture of investors in both the public and private sectors;
- SG grants contribute circa 30% of our income;
- Given the different amounts that the two intermediaries (SENScot £300,000 / SES £117,700) have received as core grant income, this single grant will obviously increase the percentage of income we receive from SG to nearer 50% however we commit to diversifying our income streams to be a sustainable organisation;
- For the private sector we attract support in a number of ways;
 - We have a tiered membership based on the turnover of the organisation raising supplementary revenue to support the movement. We have spoken to a number of private sector companies who want to invest in the movement however couldn't do it due to the agenda of the more militant, ideological intermediary in the ecosystem. SES believes that a single intermediary will unlock additional investment to the movement from such Corporations.
 - We understand the legal provision offered to social enterprises currently runs at a deficit and is currently unsustainable. We plan to implement a model where we utilise private sector pro bono expertise to support Scottish social enterprises. It will be a higher standard of provision as support will be provided by solicitors and not paralegals and it is sustainable as we harness the desire of the private sector to support the social enterprise movement and offer social enterprises high quality support.
 - We are in talks with several private sector organisations who are willing to offer a bank of hours to offer pro bono, professional support for social enterprises. We have evidence of connecting social enterprises with pro bono advice in specialist areas such as intellectual property, HR advice, or starting a social enterprise. To note, we have done this informally in the past year and examples of success include MacRoberts defending our members Mecoco Ltd. who were being sued by Coco Chanel for trademark violations. MacRoberts helped the prosecution understand Mecoco's business model and they duly dropped all action.
 - We will develop this specialist volunteer network matching the skills of volunteers with the needs of social enterprises thus further enhancing our partnerships with the private sector. Our specialist volunteer network will connect professional volunteers with Scotland's social enterprises to build

capacity and strengthen the movement. We know most social enterprises work with turnovers less than £100k per annum and this support will allow them to focus on core business functions and streamline, scale and innovate to create social and environmental change for the most disadvantaged people and communities in Scotland.

- Currently, SES's events revenue derives from events, and in 2019 it generated around 12% - 25% of its total revenue from this source;
- SES have secured the rights to develop our own Buy Social Scotland brand. We believe that by raising the profile of the brand in Scotland we will increase our membership. We have 199 social enterprises using the brand in Scotland. We launched the Buy Social Corporate Challenge in Scotland have commitments from the private sector to spend £1M with social enterprises in this financial year. Both projects drive membership to Social Enterprise Scotland thus raising additional income for the organisation. We have an agreement with SEUK to report on an aggregate spend with social enterprises across the U.K.; and
- Social Enterprise Scotland utilised our relationships within SG to bring in additional revenue for the movement. Social Enterprise Scotland collaborated First Port to establish a Social Enterprise Growth Fund, a new joint venture that will focus on investing in high growth potential social enterprises whose plans and/or stage of development are not suitable for traditional social investment. The venture was designed and developed over Autumn 2020, through an initial investment of £15 Million from SG and we launched early in 2021, making 4 initial investments before the end of the calendar year. Our projections show the Fund creating an income for SES in Year 4 thus diversifying our income streams to ensure we become a sustainable organisation.

What we will do

- SES will investigate the possibility of further diversifying its income through securing contracts for services. In the first instance we see opportunities particularly with government departments and other public bodies, who are increasingly working on social enterprise issues and require a basic grounding in the issues affecting the movement;
- By increasing our portfolio of events SES increases the sponsorship opportunities available for other organisations. We expect to generate sponsorship tied to products and activities. An example of this is Scotland's Places scheme; we have secured sponsorship from Royal Bank of Scotland for an initial three years to match-fund Scottish Government investment and roll-out an additional six places that become a tourist route for inbound visitors to Scotland who want to see the ecosystem sending them to pockets of social enterprise activity that have regenerated local communities across the country. Further opportunities will be investigated, building on existing relationships with key organisations. Although

- we would expect to be able to raise some funds via this route it is not expected to grow significantly as a proportion of SES's overall turnover;
- We will build on the success of our main event by building the portfolio of events to increase the share of revenue generated through trading and reduce dependency on the awards event. As this is SES's major source of unrestricted income, any new event will be expected to make a significant contribution to overheads and generate a surplus to increase SES's reserves; and
 - SES has some income-generating publications in the pipeline and we would expect to publish a number of new products each year. Each project will be expected to cover its own costs. However, this is unlikely to become a significant stream of funding for SES in this two-year period. We have a number of examples including a Health and Social Care Publication (sponsored by The Alliance), and Uist Places Brochure (sponsored by RBS) where we generated sponsorship income to fund the publication and raise surplus funds to offset overhead costs.

A route map to how we intend to get there

- The organisation has gradually expanded its range of corporate private sector partners, and the desire of the private sector to introduce Environmental, Social and Governance reporting is creating further opportunities to do so. In the year ahead, it will be key to add more large corporate programmes and grow the pool of founding sponsors alongside the smaller, earlier-stage relationships with SME's in Scotland. Continuing to expand to new industries will be a priority.

In year one we will:

- Increase levels of corporate support and sponsorship; and
- Grow consultancy offer organically.

In year one our targets will be:

- Through the addition of 10 private sector partners; increasing income from this source again in this year;
- Direct delivery by SES in specialist areas;
- Promotion of consultancy offer to the private sector; and
- Focus on national level contracts, European, ecosystem partnerships.

In year two we will:

- Increase levels of corporate support and sponsorship;
- Horizon scanning for new contract opportunities; and
- Deliver a Social Enterprise Exchange Marketplace event.

In year two our targets will be:

- Through addition of 20 private sector partners; increasing income from this source again in this year;
- Focus on national level contracts, European, ecosystem partnerships; and
- Raise a profit through additional events.

Environmental sustainability

Objectives

- As an organisation SES seeks to be a leader on sustainability and embed the principles of working towards Net Zero in what it does and in the support and advice it offers to social enterprises.

Where we are starting from

- We will develop a Net Zero Strategy that connects to our organisation's core values and demonstrates leadership and advocacy to the social enterprise movement.

Our aim is to:

- Empower and engage our team to understand the framework for developing a Net Zero strategy;
- Understand the organisation's current carbon footprint for material carbon emissions;
- Involve the team in the development of a Net Zero 2030 roadmap to build our collective capability, knowledge and capacity;
- Demonstrate to our funders, partners and other stakeholders that we have a credible Net Zero Strategy and roadmap; and
- SES currently has in place a number of protocols and practices to reduce its carbon footprint and reduce waste.

What we do already

Internal

- We make supply chain decisions based on an environmental sustainability matrix:
e.g.:
 - All of our IT equipment is refurbished and purchased from Edinburgh Remakery;
 - A social enterprise runs our IT support;

- The team mobile phones are provided by Fairphones;
- Our SES Awards are made by social enterprises from recycled materials;
- We deliver hybrid events – implementing new technology from venues and other organisations; our online meetings & events reduce travel and are more accessible;
- Event venues - accessible by public transport as far as possible, use social enterprise caterers as much as possible;
- Food waste - reduced this as far as possible for meetings & events
- Ethical Banking - Unity Trust Bank & Triodos Bank
- Digital First Policy however, our print brochures, when we must print, are on recycled stock paper;
- White Cube Consulting and a sub-group of Board currently working on refreshing policies as identified in the Executive Summary;
- Recycling at office – ChangeWorks.

External support for social enterprises

- Strategic partners in the environmental steering group for social enterprises, producing net zero strategy and support resources for the movement;
- We host a #GreenSocEnt support webpage;
- We ran a series of member blogs in run up to COP26 showcasing environmental work including a SES webinar; COP26, “Social Enterprise & the Climate Emergency”; Social Enterprise Futures Event called “Environmental Impact is Social Impact”; Social Enterprise Futures event called “Response to COP26: Policy Positions and what it means for our sector” (Speakers included - Patrick Harvie MSP, Minister for Zero Carbon Buildings, Active Travel and Tenants' Rights & Co-convenor of Green Party); Social Enterprise Futures event called “How your social enterprise can benefit from increasing environmental impact and how to get there” and finally the Social Enterprise CPG “Social enterprise & the climate emergency”;
- We launched a Buy Social Scotland - sustainable gift guide;
- Corporate Challenge - environmental impact highlighted in brochure;
- Commissioned 2 Environmental Awards videos for Remake Scotland; and SEUK Social Enterprise of the Year Locavore CIC; and
- We have partnered with Napier University to research the viability of a carbon sequestration project where social enterprises would give up a parcel of land for an agreed time to plant trees; this in turn would give them an alternative income stream.

Internal

- We will quantify SES' carbon footprint (baseline) for the key carbon emissions that arise from energy use at the organisation's offices in Edinburgh, business travel throughout the UK and international destinations, and other emissions where SES has indirect control, such as employee commuting. Using this carbon baseline, the aim is to then identify realistic carbon reduction actions to 2030 for those emissions quantified - to build a Net Zero roadmap. Developing a Net Zero strategy and roadmap is an iterative process that reflects changes in the organisation, working practices, technology and stakeholder needs over time. Therefore, it is essential to ensure the initial roadmap focuses on the areas with the greatest impact while working within realistic timescales and the resources available at present. Importantly, as a values-led organisation, SES wants its Net Zero Strategy to connect to its stakeholders by aligning to its core values of acting in a sustainable and responsible way that transforms communities, embraces diversity and inclusion;
- We are currently working with an HR firm on a number of policies including Sustainable Travel Policy; Environmental & Net Zero Policy and a Sustainable Events Policy; and
- We have committed to hosting hybrid events (to reduce travel for attendees).

External

- Build on existing relationships with new Scottish Government Ministers acknowledging the expertise the new Ministers, Patrick Harvie MSP / Lorna Slater MSP, bring to the table;
- Set up a network of environmental social enterprises - e.g. Spruce Carpets, Remade Network, Edinburgh Remakery, Darach Croft, Last, Lower Impact Living, ReMode Renfrewshire, Point & Sandwick Trust, Resonate Together, community energy;
- Set up a network of food social enterprises- e.g. Locavore, Cyrenians, Eco-Larder, Scotland the Bread, CFINE, The Larder, community growing to highlight their work on creating a more sustainable global food system;
- Formalise a partnership link with Circular Communities Scotland and Wellbeing Economy Alliance;
- Continue to capitalise on the momentum from COP26 in Glasgow and be a key player in leading the way in truly transformational change to become a sustainable global economy for people/ planet and to tackle climate change;
- Engage with The One Show (BBC) re showcasing environmental social enterprises in Scotland as a way to tackle climate change - the programme has done a huge amount to move the single use plastic agenda forward due to their coverage and campaigns. The One Show has also already done a lot of work around COP26 and

- climate change (including hosting the show from Glasgow in the first week of COP26);
- Develop content for Reporting Scotland and BBC Scotland's The Nine about showcasing more environmental social enterprises - e.g., Remade Network appeared on Reporting Scotland recently; and
 - Green recovery from Covid-19. The existing relationship with SCDI is real opportunity for behavioural change as a positive outcome from the pandemic and to move forward in a more sustainable way to create new employment opportunities;

A route map to how we intend to get there

We must ensure Equality, Diversity & Inclusion and Climate & Sustainability as cross cutting themes throughout our work plans. These themes:

- Should be considered across all of SES's internal and external work and processes;
- Should seek to articulate the good story social enterprises have to tell in both areas more prominently; and
- Should seek to raise the bar across the social enterprise movement to continue to be the best of business in both areas.

In year one we will:

- Benchmark our current carbon footprint; and
- To commission a full review of our policies and procedures.

In year one our targets will be:

- To ensure 50% of our expenditure is spent through social or environmental supply chain;
- To adopt a staff handbook that commits the organisation to sustainable working practices, with a plan to be Net Zero by 2030.

In year two we will:

- Increase awareness environmental sustainability throughout the movement.

In year two our targets will be:

- We will encourage all social enterprises to adopt net zero policies

15. Appendix 5 – Social Enterprise Scotland, [Articles of Association](#)

See file attachment "Appendix 5 SES Articles of Association (SC294227)"

16. Appendix 6 - Social Enterprise Scotland – Marketing and Communications & Digital Engagement Outline

Introduction

This document seeks to:

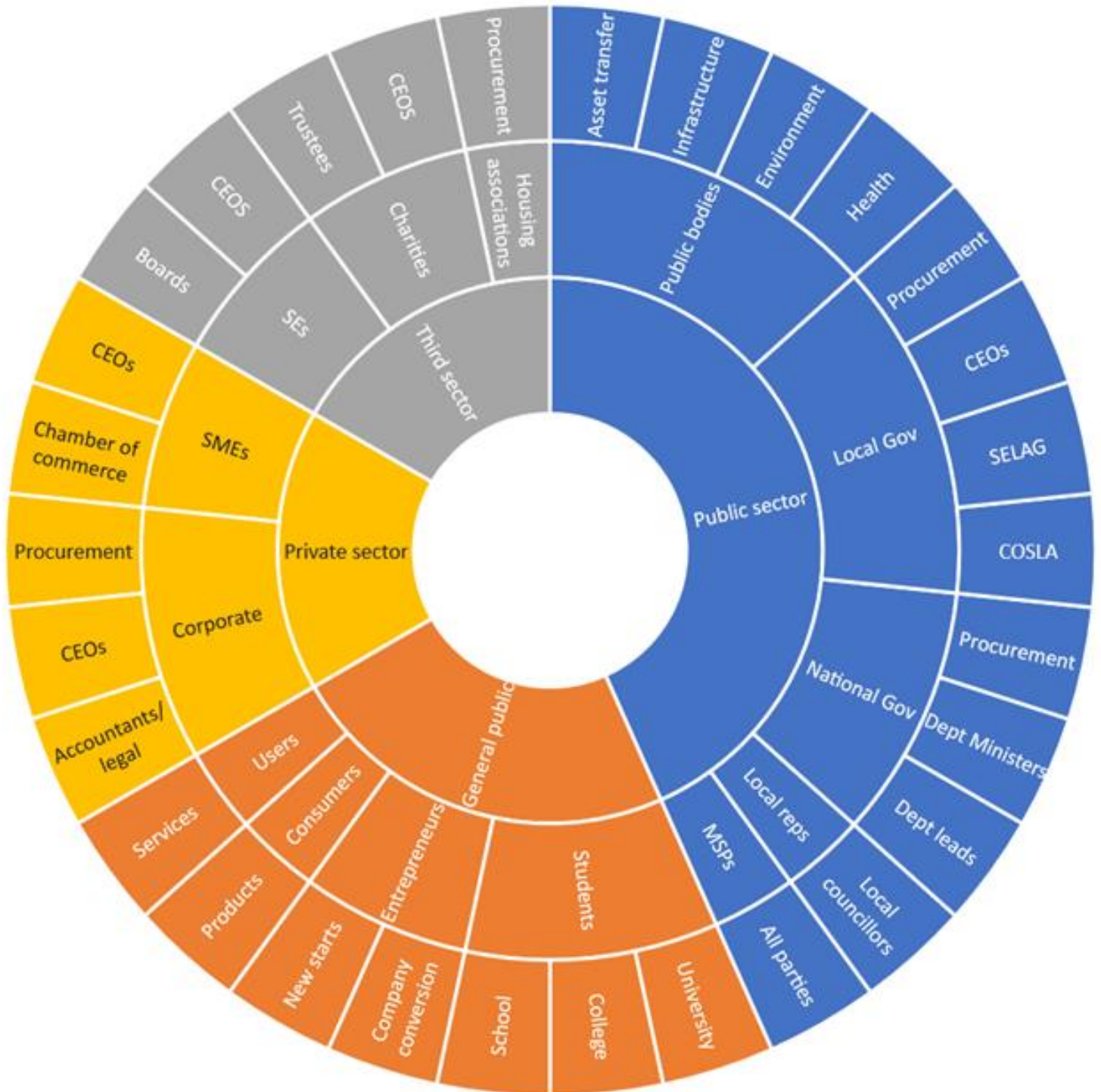
- Identify key audiences and associated messages;
- Map out key messages and engagement strategies in a broad way; and
- Consider digital approaches to ensure involvement across Scottish regions.

Key Audiences

Defining key audiences for the whole social enterprise movement is an exciting opportunity. Social enterprises operate across a significant range of activities, deliver a variety of products and services and work both locally, nationally and internationally. Four key segments are highlighted below to map out the different target audiences we regularly communicate with:

1. Public Sector (Blue)
2. General public (Orange)
3. Private sector (Yellow)
4. Third sector (Grey)

Audience segmentation



Audience	Key messaging Themes	Engagement Strategy Outline
Scottish Government and Public sector	Public procurement; Wellbeing economy; Covid support; Public Services Reform; Health and Social Care; Environment and Sector Specific issues.	<ul style="list-style-type: none"> ➤ Consultation responses; ➤ Public speaking in-person and online; ➤ Bulletins and targeted emailers; ➤ Online campaigns (e.g. the SE Pledge); ➤ CPG / SELAG; ➤ Sector case studies and publications; ➤ Research and Sector Reports; and ➤ Key events (Procurex).
General Public	Raising awareness for the sector as a movement; introducing social enterprises, their leaders and founders and the social and environmental impact they deliver in Scotland.	<ul style="list-style-type: none"> ➤ Buy Social Scotland consumer website; ➤ Blog articles; ➤ Press and media engagement; ➤ Social media campaigns; and ➤ Media advertising campaigns;
Private Sector	Social procurement; Supply chain; Net Zero, ESG and CSR	<ul style="list-style-type: none"> ➤ Buy Social Scotland B2B website; ➤ Blog articles; ➤ Online brochures; ➤ Social media campaigns; ➤ LinkedIn media campaign; ➤ Webinars; ➤ Industry events (Procurex); and ➤ Corporate engagement plan with pledges
Third Sector	Social procurement; Supply Chain; Enterprise Activity, Local Organisations, Sustainability; Shared values and Impact	<ul style="list-style-type: none"> ➤ Partnership working; ➤ Initiatives / promotion in bulletin ➤ Targeted emailers and social media; ➤ Joint responses to consultations; and ➤ Blog articles, webinars, press and media articles in Third Force News or Pioneers Post, LinkedIn, The Gathering

Digital approaches

Website, blogs, emails and social media – Online promotion and information sharing will continue to play a key role in how we promote social enterprise as a movement and social enterprise organisations. Our enhanced brand, website, and email strategy will improve online signposting, referrals, knowledge exchange and support accessibility.

Online webinars – Weekly webinars started in April 2020 have proved a valuable way to engage with a wide audience, both in terms of target profile and geographical basis.

Shared communications folders – Establishing shared folders for both our Buy Social Scotland and Social Enterprise Places campaigns has been useful in providing text and draft copy to bring in partners and social enterprises involved as well as press and media partners to share the word.

Hybrid events – The exact nature and cost of hybrid events needs to be investigated, but we are committed to deliver events such as our annual awards, CPG etc in hybrid format, both online and 'in-person' format moving forwards to ensure attendees in rural, remote, or islands areas are included.

Digital publications – We have moved towards predominantly digital brochures for environmental impact reasons and to produce and share documents more widely.

Very Connect – Our online member platform enables members to post to share news, contact each other, and find news from the movement all in one place.