

Scottish Third Sector Research Forum

First Quarterly Meeting - 27 April 2009, St Andrew's House, Edinburgh

In attendance:

Geoff Pope, Third Sector Division

Sandy Watson, Scottish Enterprise

Ruchir Shah, (SCVO)

Antonia Swinson (SSEC)

Kris von Wald (ACOSVO)

Nicola McBain (OSCR)

Helen Harper (VDS)

Silvy Peeters (ESS)

Eleanor Burt (St Andrews University)

Louise Scott, Scottish Government

Tracey Houston, Third Sector Division

Apologies:

Chris Higgins (HIE)

Catriona Craib (HIE)

Kathy Cameron (COSLA)

Gerry Higgins (CEiS)

Minutes

1. No amendments were received and the minutes were approved. Future minutes will be placed on the Scottish Government website.

2. The main purpose of the meeting was -

- to discuss and approve the draft remit for the Forum for the forthcoming year
- to provide updates on current activities and research plans for the forthcoming year

Draft Remit (2009-10)

3. The main remit of the group was summarised as -

- to provide a holistic oversight of third sector research
- to determine which groups are best placed to take forward particular areas of research
- to identify any potential gaps/consider who is best placed to address these
- to support ongoing research
- to share information

Main points raised by members

• The new Chief Executive of SIS, Craig Campbell, was suggested for Forum membership as he is now regarding research/market analysis as key to the work of SIS

• The Wise Group and the Poverty Alliance, who now have Research Officers, were also suggested

• However, as the Forum is operating with optimal numbers, it was agreed that, whilst it would be helpful for SIS to be part of the process and to influence the work of the Forum, this would not require full membership. Likewise, the Wise Group and the Poverty Alliance could feed into the Forum further down the line.

• The Forum could make more general links with the Funders Forum (membership including Local Government, Big Lottery etc). Ruchir Shah agreed to facilitate this.

• Sencot has started undertaking some basic research into the economic strength of the Local Social Enterprise Networks. Information from Tayside, based on seven organisations (roughly half of the network), shows a turnover of £5.5m (with an average of 81% of this as trading income). This is not robust research, but provides an interesting snapshot. Analysts from the Scottish Government could offer advice/guidance on this work to help make it more robust. Louise Scott agreed to be the main contact for this.

It was agreed that there would be no formal extension of Forum membership and that the remit should be revisited next year.

Updates from Forum Members

Louise Scott (SG)

• Contribution of the Third Sector to the Government's Purpose and Five Strategic Objectives - review of selected literature due to report at the end of April. Publication is likely in June. Dissemination will need to be considered and the project manager will be taking advice from the Advisory Group. Forum members will be informed of developments.

- The Opportunities and Challenges of the Concordat for the Third Sector - this longitudinal study to 2015 will be named "The opportunities and Challenges of the Changing Public Services Landscape for the Third Sector" and will cover not just changes as a result of the Concordat, but other policy changes that are planned (such as Best Value 2, simplification of the scrutiny landscape; reducing the number of public bodies etc) as well as any other changes that might come on stream throughout the course of the study. A Project Board is being established (including SCVO and other senior representatives from government and academia with expertise in longitudinal analysis, organisational change and public service delivery). A number of organisations will be tracked over time, making qualitative and (less so) quantitative assessments to assess the changes at organisational level as a result of changes in the public services landscape. The number and types of organisations will need to be considered to have confidence in any emerging trends and forum advice will be sought on identifying who might best contribute to the study. The advert for this will be placed in the Official Journal of the European Union (OJEU), where all public sector contracts above a particular price threshold have to be advertised, and on the SG social research web page. It will be forwarded to forum members. Forum members were invited to circulate to their contacts.

- The Role of Third Sector Organisations in Community Planning Partnerships - this will be titled "Engagement in Community Planning Partnerships in the Third Sector". The study will be advertised shortly on the Scottish Government website and will seek expressions of interest. The link will be circulated to Forum members. Forum members were invited to circulate to their contacts. A short list of 5/6 will then be invited to tender for the work. The work hopes to capture both formal/informal links and is about policy design and delivery, not about procurement.

- Evaluating the Success Factors for Establishing a Thriving Social Enterprise - The overall aim of the research is to evaluate the success factors in establishing a thriving social enterprise in Scotland. The study will be advertised on the Scottish Government website and will seek expressions of interest. The link will be circulated to Forum members when available. Forum members were invited to circulate to their contacts. A short list of 5/6 will then be invited to tender for the work. The work is too small to split, but organisations could collaborate in a joint bid. It will consider what social enterprise is, and include work on BME.

Nicola McBain (OSCR)

- Having had a Research Officer for a year (Louise Meikleham), OSCR has been working on developing a Research and Evaluation Plan for 2009-11. This plan is currently in draft being discussed by Senior Management.

- The aims of any planned research will fit as far as is possible with the Scottish Government's National Performance Framework and OSCR's strategic objectives, statutory obligations, mission and values.

- OSCR's research activity will take into account

- o Performance reporting

- o Internal analysis

- o Evaluation

- o Themes studies

- o Standalone or collaborative research projects

- The plan takes account of OSCAR's past research and evaluation activity which has included collaboration on the ACOSVO Governance Project and production of Scottish Charities 2005 and 2008.

- Possible projects for the future include one on resilience based on the impact of the recession on the charity sector. This is currently at the planning stage, but as it develops OSCAR would welcome Forum input. An update will be provided in a couple of months.

- Other possible research topics include OSCAR's overlap with other regulatory regimes and voluntary sector overlap and income. Again OSCAR will engage with Forum members as applicable.

- Lastly an ongoing current project is Integrated Reporting. This will review the information supplied to OSCAR by charities and how this is used. Its aim will be to develop reporting requirements so that these are more integrated, as well as ensuring the information gathered is of interest and relevant to OSCAR's stakeholders. There will be a formal consultation on this towards the end of 2009.

- A recent article in the Scotsman highlighted that charities were changing their constitution to facilitate mergers. Increased numbers of mergers may be a good measure of the impact of the recession. Comparisons could be made with the small business sector.

- The Scottish Chambers of Commerce are involved in sector-specific research (e.g. tourism) and can identify trends. The Forum needs to consider how to access this in order to take account of the impact on the third sector.

- EB will send a presentation on better regulation to OSCAR.

Silvy Peeters (ESS)

- Two possible future projects will be carried out internally -

- o User involvement in evaluation - scope project to increase understanding

- o Evaluation and IT (use of databases) - scope out need for development of ICT solutions

- Two current projects -

- o Collaborative with Community Food and Health Scotland (CFHS)

- o Collaborative with Learning Links Scotland (LLS)

- The two year CFHS project, comprising 6 projects demonstrating how local food and health activities can contribute to national and strategic outcomes, is entering the final stage. Project workers and policy makers have come together to discuss if and how small evidence gathered from self-evaluation can impact policy making on a local and national level. SG, Local Government and other policy makers had the opportunity to identify if policy messages were clear in projects' self-evaluation reports. Policy makers responded positively to using self-evaluation as evidence, especially now government has moved away from outcomes-based to outcomes-informed policy making .

- Issues around how evaluation can feed into public policy include -

 - o knowing the right person to contact

 - o small organisations may not have the time/resource

 - o many small pieces of evidence need to be captured to provide evidence towards achieving the national outcomes

 - o knowing who is responsible (organisations, policy makers or both?)

- This is a very challenging area and ESS are pushing the boundaries to consider ways to feed evidence gathered on the ground into local and national policy making processes. Scottish Government suggested it be linked with SROI reports to consider the outcome of all the evidence of impact

- Collaborative with Learning Link Scotland - one year project to articulate the outcomes of Scottish adult voluntary learning within the National Outcomes and to pull together evaluation tools and methods. A variety of ideas and techniques will be looked at in 7 adult learning organisations.

Key points from Discussion

- SCVO have developed the Social Economy and Enterprise Database for Scotland (SEEDS) database which will operate for a further year. However, Scottish Government wants to ensure that public sector purchasers are only being directed to one site for data on the third sector, which will be the Suppliers Development Database (part of the Suppliers Development Programme). All third sector organisations can sign up for this service irrespective of whether their local authority is a member.

- Overall there will be an increase in data gathering and availability on the third sector, especially with the increased use of SROI. This will need to be aggregated by theme. This will help develop a fuller picture of where and how the third sector adds value.

- The EKOS study for the Dynamic Inclusive Communities work stream is currently undertaking a meta-analysis of evaluations and mapping the support and infrastructure for the sector. The Evidence Library doesn't cover evaluations so there is a gap here and this may provide a useful

model. SCVO will co-ordinate with SG on the Evidence Library to ensure EKOS's work gets appropriate publicity.

- A great deal of research is carried out by the private sector., eg KPMG, Scottish Enterprise. It will be useful for the Research Forum to look at where this is due to take place with a view to including a third sector sub-analysis where appropriate. SW to investigate the presence of a member of SEN's Knowledge Team at the next Forum.

- Globalisation has been about shared learning to date, but could be about trade. The Non-profit Forum Newsletter from the US has useful information and contains UK submissions which may provide an opportunity for international networking. SW to circulate the web link to Forum members.

- Social Enterprises need to be aware potential international markets. For example a German social enterprise makes printed circuit boards, which now produces them for Siemens' lifts for a world market. SW to check with Pauline Graham of SFS if any of her members work internationally.

- Issues - aggregating learning; influencing private research

- ACOSVO members are interested in changes in management in response to the recession, but there is no knowledge of formal research. We need to identify the key things that we should be looking at in a recession. It is difficult to sift out the factors that contribute to change, but the SG longitudinal study will be helpful with this.

- Scottish Enterprise has conducted work to consider the effects of the recession 'What are our customers telling us?'. In the first quarter, 75% of businesses said the recession had no effect and they had plans for growth, but this figure is likely to drop dramatically. We could look for similar trends in third sector organisations

- SCVO highlighted a 'sensitivity analysis' study across 5 nations (including Ireland) aimed at building a picture of where the recession will impact. This will identify areas needing support and could perhaps focus on initiatives with particular bits of the sector. Possibly a role for OSCR in this work. All members of the Forum have a role to play in understanding the effects of the recession and could feed into OSCR's work. While the third sector will in some ways find things tougher during the recession, externalisation may also possibly result in more work for the third sector

- Need to consider what to do with the results of research on the impact of the recession and need to time the work before the recession ends. OSCR's work is at an advanced stage, but needs to be signed off by senior management. SCVO suggested meeting with them before the next Forum for a more focussed discussion

- SG research will highlight gaps for policy intervention that can be influenced in- house.

The Scottish Third Sector Research Conference, Autumn 2009 (SCVO)

- The recent series of seminars organised in conjunction with the ESRC had centred around the themes of localism, recession and innovation. The forthcoming conference will reflect these three themes. This is a useful opportunity when there are now two ESRC Research Centres in place, but clear topics of research are needed. Discussion has taken place with Paul Tyrer of SG, and Professor Stephen Osbourne of Edinburgh University will present at the conference. Topics will include evaluating the role of the third sector in local outcome agreements, community volunteering, trends in giving, enterprise in the third sector, innovation and philanthropy, and an alternative vision (to GDP) of progress.
- More engagement is needed between third sector practitioners and with the academic sector. The ESRC are keen to contribute to a round table discussion with SG, LAs etc to discuss where we are with the research agenda.
- The conference is likely to be in mid October, although November might better accommodate the academic timetable
- SCVO keen for input as to how the conference can be relevant to the third sector. There is another conference in England on 6 September to consider the Whitehall policy context. This will be very research based and not linked to practitioners.
- RS will circulate a paper to Forum members directly for comment.

Points raised

- VDS are conducting some work on measuring volunteering

AOB

- The Baring Foundation report - The First Principle of Voluntary Action: Essays on the independence of the voluntary sector from government in Canada, England, Germany, Northern Ireland, Scotland, USA and Wales - was highlighted to the group.
- The report indicates that there is a good understanding of the value of the third sector, but that funding issues are seen as a potential threat. The report will be launched in hard copy at a summit in June/July. Meanwhile it has been placed on the Evidence Library and will be circulated electronically to Forum members.

Next meeting

- Possible dates will be circulated to the group for w/c 17 August (date now agreed as 18 August)
- The agenda will follow on from today's discussion focusing on:
-
- How we might effectively aggregate evaluation reports and SROI analyses

- How we can influence private sector focussed research to look at the role of the third sector
- How partners can feed into OCRs forthcoming research on the impact of the recession