Third Sector Research Forum
24th April 2012
10:00-12:00
Social Enterprise Scotland, Thorn House, Rose St

Present
Kay Barclay, Scottish Government
Geoff Pope, Scottish Government
Dave Cruickshank, Scottish Government
Duncan Thorp, SES
Sine Munro, SES (guest)
Carolyn Sawers, Big Lottery
Kevin MacDonald, HiE
Linda Boyes, ACOSVO
Lisa McGhee, OSCR
Mike Woolvin, SAC
Ruchir Shah SCVO
Sandy Watson SE
Stephen Osborne, Edinburgh University
Patty Lozano Casal, ESS

Apologies
Helen Harper and John Lee, VDS
Jonathan Coburn, CEiS

1) Introductions

Fraser Kelly from Social Enterprise Scotland who were hosting the meeting welcomed the Research Forum but had to leave to attend another meeting.

Geoff introduced the session and bid his farewells as he is moving post within Scottish Government and will no longer be responsible for third sector issues. He handed the Chair over to Kay Barclay who is taking over the role. Mark Meiklejohn from Third Sector Unit at Scottish Government will join the forum to support Kay and to provide the policy link to the Intra Government team led by Gareth Allen/

2) Evidence Papers Update

Following the success of the Health paper the Forum is now working to develop a number of themed papers to support policy work.

- **Why involve the third sector in reducing reoffending?**

Geoff Pope fed back on this paper that he and Kay are developing collaboratively with a sub group of the Forum (SG, ESS and Big Lottery plus some additional stakeholders: The Robertson Trust, the Partnership Initiative, Justice Analytical Services). The paper will demonstrate the benefits of working with the third sector to

reduce reoffending drawing on evaluations and evidence held by organisations. It aims to support the Review of Community Justice Funding and the Reducing Reoffending Change Fund. The Robertson Trust are primary authors of the paper which will be completed by 17th May.

- **The third sector and it's role in coproduction of public services**

Stephen Osborne is resourcing this paper through the University of Edinburgh Business School. He has successfully applied for funds and is in the process of identifying a student to complete the paper. The paper will outline the typologies of coproduction drawing on the findings from recent PhD research, and will identify examples of these typologies as they are played out in different Scottish contexts. It will highlight the learning around coproduction. The publication should be ready by autumn depending on when the project starts.

Clarification around the concept of "co-production" was requested. Stephen noted that this is a variable concept which most commonly refers to users of services taking a role in the production of services alongside producers. It can also refer more generally to joint working between different stakeholders (users, public sector and third sector).
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- **The role of the third sector in parenting**

Carolyn Sawers is planning to employ a consultant for three months to conduct a review of evaluations and data that Big Lottery hold around parenting with a view to gather the learning from the perspective of the funder and also the sector's own learning. She was happy for this to be the next Research Forum badged evidence paper and would be structured in a similar fashion with policy linkages around the parenting strategy being made. ESS are interested in being part of the sub group to work on this.

AP: Kay to identify appropriate members of a sub group to coordinate the paper, including key policy links and to arrange a meeting with Carolyn.

3) Other activities

- SCVO are planning a paper on Digital Agenda and personalisation examining digital empowerment
- Stephen Osborne noted that two events which will involve a series of papers are being held by Public Services Research at the University in late May:
    1) Risk and Uncertainty for third sector
    2) Third sector emerging from recession

AP: Stephen to provide the programme when it is finalised

4) Update on Quantitative Data on Third Sector in Scotland

a) Update on Scottish Government analytical work (Dave Cruickshank)

Dave Cruickshank, statistician in Local Governance and Reform Analytical Unit provided an update on the Scottish Government's plans to produce an evidence briefing paper. This will include analysis of the third sector database which is based on OSCR's database with some other lists added. OSCR has kindly agreed to provide the data for this purpose. Organisations are categorised to enable some types of organisations to be separated out in the analysis. Total numbers, total income, geographic spread and charitable purpose will be calculated. Some income and expenditure of the larger organisations (those with incomes over £250K) will be done using data on the Supplementary Monitoring Form.

The briefing paper will also include additional data sources including public sector spend data, workforce data, data on charitable giving and volunteering data.

Public sector spend analysis is being conducted by matching the third sector database to the SEAS (Scottish Executive Accounting System) to identify third sector organisations and extract the relevant spend data. This can be split into grants and funds for goods and services. Data from Local Government Financial Returns, Police and Fire and Health are also added in to get as complete a picture as possible.

Employment data from the Annual Population Survey has recently been published. The big difference in the total third sector employment figure and that produced by SCVO's panel survey was again noted and discussed.

An early draft of the Quantitative Data paper will be available by summer. The content will be checked with OSCR and then reported back to this forum. The intention will be to publish the data once it is established how robust it is although it will not be an Official Statistics publication.

Mike Woolvin mentioned analysis that he has done (with colleagues at VDS) that is relevant to the quantitative data:

1) Mapping the distribution of charities in Scotland (Mike Woolvin and Michael Keller, Scottish Agricultural College)

Analysis of OSCR database of charities along with the 2009-10 6 fold Scottish Government Urban Rural Classification and 2009 Scottish Index of Multiple Deprivation to look at urban and rural differences.

This will be published in the Rural Scotland in Focus 2012.

2) Volunteering in Scottish Charities 2011, VDS

A sample of 1000 charities from OSCR (representative of location and income) was taken and a 60% response rate achieved. Respondents have been matched with OSCR variables and the 6 fold urban rural classification.

b) Update on SCVO's quantitative data plans

Ruchir explained that SCVO have run the panel survey in it's current form since 2001 based on a representative stratified sample of 2000 organisations. They intend to repeat the panel survey this year although in the longer term they would ideally cease doing this when the Scottish Government dataset is established. This year the data is being synchronised with NCVO's database.

c) Key findings from recent HiE Social Enterprise Survey
Kevin MacDonald discussed the key findings from a recent survey of social enterprises that HiE have commissioned. A summary is attached below and the full report is available on the HiE website, but to highlight some key points:

- Amongst enterprising third sector organisations turnover has increased over the past 5 years but organisations are still quite reliant on grant income.
- A relatively high number of organisations are delivering health and social care yet HIE support relatively few in this field
- Organisations are aware of support that is available but often do not access it. This could be because organisations do not regard themselves as "high growth" businesses.

Social Enterprise Scotland are also planning to do a survey of enterprises in the rest of Scotland and will build on this methodology and approach. Duncan Thorp will keep the group informed on progress especially as there are important links to make with Scottish Government's Quantitative Data work.

There was general agreement that the **Quantitative Data Sub Group** should be reconvened to facilitate the development of the Scottish Government paper, reach agreement on how the data should be disaggregated and draw in additional relevant sources.

Action point: Kay and Dave to identify members and arrange a meeting timed with the June paper to allow discussion and commentary.

Stephen also suggested having a Research Methodology group but it was felt that this would be for more generic purposes. Further thought would be needed on this.

There was also discussion around volunteering data that VDS have recently collected (Mike Woolvin to make links) and ACOSVO identified an interest in distinguishing those who volunteer on Boards from other types of volunteering.

5) Scottish Government Third Sector Longitudinal Study: Presentation on findings from Year 2 (Sue Bond, University of Napier)

Sue Bond presented the findings from the second year of the study. A copy of the presentation is attached. There was discussion around the extent to which organisations had accessed support from SG and other types of business support.

6) Membership requests

The Robertson Trust and the Befrienders Network had both applied for membership of the forum. Some felt that all applicants should be allowed to join regardless, whist

others felt that the process of vetting was important to avoid the forum becoming too unwieldy.

This raised the issue of how large the forum should become and prompted the need to review membership to ensure that there is appropriate coverage. Going forward it may be necessary to develop a core group of members with associate members who would be drawn upon in relation to particular interests. Some organisations might be approached to be involved either as core or associate members such as Scottish Federation of Housing Associations or Development Trust Associations.

It was felt therefore that due to its work as a Charitable Trust across a range of policy areas and contribution to the evidence base The Robertson Trust warranted core membership. It was unanimously agreed that they should be invited to join as a full member. The Befrienders Network was felt to be more specialised in essence would be represented by VDS as a type of volunteering. It would therefore not be invited to join the core membership but asked to be part of an associate group that might be called on to participate in project sub groups. That said, a review of membership in line with the changing remit of the group will be tabled at the next meeting so this decision could be subject to change.

7) Date of next meeting

18th September at the University of Edinburgh (Stephen Osborne) 10:00-12:30 followed by lunch (tbc).

Annex of Research papers

Executive
summary.doc

Third Sector Year
Two Report Presenta