

DEPARTMENT OF ENTERPRISE TRADE AND INVESTMENT (DETI)

SOCIAL ENTERPRISE NI EVALUATION

JANUARY 2016

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1. INTRODUCTION

- 1.1 The purpose of this report is to provide an evaluation of the work programme delivered by Social Enterprise NI for the three year period October 2012 to September 2015 inclusive.
- 1.2 This evaluation was carried out by DETI's Analytical Services Unit (ASU) and Business Development and Liaison Unit (BDLU). The terms of reference for this assignment are attached at **Annex A**.

2. BACKGROUND

KPMG Social Economy Evaluation 2011

- 2.1 In March 2011, DETI appointed KPMG Consultants to undertake an evaluation to determine the social economy sector's potential to contribute to the economic regeneration of our communities, and to establish the best mechanism to take this work forward. The purpose of the report was to help unlock the potential of the sector in partnership with the key stakeholders and to inform the future strategic policy direction and any future action plans, within the context of the Executive's draft Economic Strategy.
- 2.2 The key recommendations within the report were in relation to the funding of the then Social Economy Network (SEN) and the development of a new representative structure for the sector. The report recommended that a new representative structure should be established to harness the collective weight of the social economy sector and broader third sector. The recommended delivery model was a publically tendered work programme aimed at a collaborative network/consortium of existing social economy enterprises and third sector interests.
- 2.3 At that time the view was that the social economy sector needed representation/ a representative structure, but the arrangements needed to move to a different space that was much more entrepreneurial and collaborative, with other relevant bodies and network organisations, than was

currently the case. The collective weight of the social economy sector and broader third sector was not being harnessed by current arrangements, which ultimately had an impact on the performance of the Social Economy (SE) sector itself.

Social Enterprise NI

2.4 Social Enterprise NI was appointed, after a public procurement exercise, in October 2012 by DETI to design and deliver a Social Economy Work Programme (SEWP) in direct response to this feedback from the sector. DETI's contribution to the SEWP was financial support of up to £150k per annum for three years subject to agreement of annual operating plans over the three year period.

2.5 The overall objective of SEWP is to identify and implement a programme of initiatives to enable the continued growth of a sustainable social economy sector, through a collaborative network / consortium of social economy stakeholders. These initiatives were detailed in annual operating plans agreed each year with DETI and monitored on a monthly basis. The core programme objectives were to:

- Promote and raise awareness of the social economy sector across Northern Ireland;
- Provide the impetus for collaboration to ensure the collective weight and capacity of the social economy sector and broader third sector are realised;
- Develop new products to support the sustainable development of the social economy sector;
- Pilot test product/service delivery to develop the social economy sector;
- Communicate and promote the full breadth of existing support programmes/initiatives to the sector including local government initiatives;
- Promote good practice both within the sector and about the sector; and
- Represent the collective interests of the social economy sector.

2.6 Social Enterprise NI is a consortia of social enterprises. The list of consortium members is as follows:

- Business in the Community
- ARC-ITEC
- Bryson Charitable Group
- CO3
- Social Impact Tracker
- Employers For Childcare Charitable Group
- North West Community Network
- Rural Development Council
- SENSCOT
- Social Enterprise Academy
- Social Enterprise Mark CIC
- Work West

2.7 Social Enterprise NI's lead partner from October 2012 to September 2013 was Employers for Childcare. However the lead partner changed to Business in the Community (BITC) from October 2013 to the end of the contract to reflect a change in focus of the organisation as it evolved to have more of a business focus.

2.8 The SENI Executive team consists of the Director who is supported by the Networking and Relationships co-ordinator. Both of these post holders receive management, administrative and financial support from BITC as lead consortium partner. The Director reports to the Consortium which provides overall strategic direction and acts as a sounding board and helps to ensure project targets are met.

2.9 The SENI Board is currently comprised of representatives from the following organisations:

- BITC
- Ulster Bank
- Bryson Charitable Group

- The British Council
- Employers for Childcare
- Northern Ireland Institute for the Disabled.

3. EVALUATION METHODOLOGY

3.1 The evaluation methodology was based on the following approach:

- Desk based research consisting of the review of the Social Enterprise NI's Operating Plans for 2012/13, 2013/14 and 2014/15 and related annual reports for these years;
- A survey of members views on the priorities for the sector; and
- Up to ten 1-1 interviews with a broad range of key stakeholders including Social Enterprise NI Board members, social economy practitioners, social economy support organisations and public sector representatives.

3.2 In order to gauge the views of the social economy sector as part of the evaluation, a survey was undertaken of the Social Enterprise NI membership, which is a known group of circa 150 social economy enterprises/entrepreneurs with a common representative body. In addition, a series of more focused meetings was held with a range of key stakeholders to be identified in advance of the evaluation process being commenced.

3.3 The survey of Social Enterprise NI members was developed to gather members' views and opinions on: the performance of Social Enterprise NI over the period; the challenges and opportunities that face the sector now and in the immediate future; and on how a representative body might best represent members and the sector in the future.

3.4 Interviews and E-survey of Social Enterprise NI members were conducted and structured along the lines of an agreed topic list. The survey, which was run in

the first two weeks of October 2015, received 50 responses from 146 members identified by Social Enterprise NI.

4. SUMMARY OF KEY FINDINGS

Progress against operational plans

- 4.1 DETI BDLU approved SENI operating plans on an annual basis. Progress against the operational plans was updated and shared with DETI on a monthly basis. This was followed up with face to face meetings between DETI BDLU and SENI to discuss progress. Any issues identified were subsequently followed up via email. Payments to SENI are subject to satisfactory performance against operating plans.
- 4.2 Final progress against each operational plan is identified in **Annex B**. It is evident that SENI have achieved the majority of the targets identified in the operational plans. Table 1 below identifies, at a high level, the number of targets which were fully achieved and partially met.
- 4.3 It is worth noting the number of actions identified in the table below does not correlate to the level of complexity or effort required to achieve. Also DETI BDLU reviewed progress at regular intervals and ultimately was content with progress for the project to continue.

Table 1: Progress against SENI Operating Plan 2012/13 to 2014/15

	2012/13	2013/14	2014/15	Total
No. of actions identified in operational plan	31	25	33	89
No. of actions completed	22	23	26	71
No. of actions partially	9	2	7	18

completed				
Percentage achieved or partially achieved	100%	100%	100%	100%

N.B. Operating year ran from October to September

- 4.4 Further narrative is provided on progress against partially met targets in **Annex B**, however clearly SENI has made progress against all its targets. By and large, SENI has fully achieved or partially achieved its targets. Of the targets which were partially met, and could be quantified, SENI achieved circa 75%-92% of the target.
- 4.5 In instances when actions were not fully addressed and could not be quantified, this was largely due to a shift in circumstances or in the interests of stakeholders. With that said, SENI often continued to build working relationships or made alternative arrangements. For example, SENI attended a Northern Ireland Assembly and Business Trust (NIABT) event, after a Lunch with the CBI didn't take place. It is notable that three of the Year 3 targets were delayed, two of them were scheduled for October 2015, just outside the operating year and one is due to be rescheduled for the Autumn.
- 4.6 Overall, SENI has largely addressed, or made significant progress against, the majority of actions identified in the operating plans. Furthermore, given DETI BDLU oversight, with monthly meeting/updates regarding progress against targets and that funding was approved based on satisfactory progress being made, it is clear that DETI BDLU were content with progress against the operating plans.

Estimated vs. Actual Cost

- 4.7 The original business case proposed total funding of £450k for the 'Social Economy Work Programme' at £150k per annum. As identified above, DETI BDLU monitors progress against targets on a monthly basis. Payments are made to the lead partner in arrears subject to DETI BDLU approval and a

satisfactory report from an Invest NI claim inspector validating SENI expenses over the period.

- 4.8 Table 2 provides a breakdown of funding over the three years. It is evident from the table that overall, the actual projects costs were less than originally estimated (£27,541 or 6.1%). Full funding wasn't drawn down in year one, due to a slower than expected start. SENI was formed as a new collaborative organisation and it took time (BDLU estimate around two months) to get the new employees into post and the organisation up and running. Although full funding was drawn down in years 2 and 3 (subject to pending invoice). As a result, the proposed project remained within budget.
- 4.9 Originally, Employers for Childcare (EfC) were the lead partner. Although DETI BDLU was content with their performance, the EfC Board took the decision to withdraw as lead partner due to a combination of reasons including a desire to rotate the lead partner role and to move to a more business oriented approach and to explore closer linkages to the Private Sector. Business in the Community (BitC) was appointed lead partner at the start of the second year (November 2013).
- 4.10 SENI staff transferred from EfC to BitC. The lead partner is contracted to provide a range of services including office space, office infrastructure and financial support which are funded by DETI. DETI BDLU did notice an increase in these costs when the lead partner shifted from EfC to BitC, although this was largely addressed at the time. However, this was a strategic decision taken by SENI which BDLU was content to endorse at that stage.
- 4.11 It is worth noting, to assist in the shift in lead partners, BiTC received an advanced payment of £25k in December 2013, to assist in the set up of costs of the newly acquired SENI contract. The advanced payment was recouped over the same operating year.

Table 2: Estimated vs Actual DETI Funding 2012/13 to 2014/15

Year	Payee	Funding drawdown ¹	Pending Invoice ²	Total	Estimated Cost ³	Estimated vs. Actual costs (%)
2012/13	Employers for Childcare	£122,459		£122,459	£150,000	-18.4%
2013/14	Employers for Childcare (1mth)	£12,737		£150,000	£150,000	0.0%
	Business in the Community (11mths)	£137,263				
2014/15	Business in the Community	£112,789	£37,231	£150,000	£150,000	0.0%
	Total	£385,248	£37,231	£422,459	£450,000	-6.1%

N.B. Funding coincides with operating year i.e. October to September

Other Income

4.12 SENI has generated income from a range of sources, including membership, conference events and sponsorship. Between 2012/13 – 2014/15, the requirement for SENI to generate income was not identified as a target and as a result revenue was not independently verified by DETI. However DETI BDLU have stated it was considered under the SENI contract that DETI was contributing to, rather than fully funding, SENI activity.

4.13 Generating income has since been identified as a target in the 6 month extension from October 2015 and is being monitored by DETI BDLU in the monthly management reports. Table 3 below identifies other income generated by SENI. Due to the level of detail provided in the End of Year 2 summary report other income has been identified in its totality over each of the three years. Over the period, SENI has increased the level of other generated income from £15,500 in year 1 to £63,575 in Year 3.

Table 3: Other SENI Income 2012/13 to 2014/15

	Other Income
Year 1	£15,500
Year 2	£36,120
Year 3	£63,575

Project management and control, risk mitigation and lessons learned

- 4.14 The financial elements of the project were well managed. SENI provided invoices which were validated by Invest NI claim inspectors. Before being paid by DETI, advanced payments were claimed back against subsequent invoices within the operating year. From a DETI finance point of view, advanced payments should have been recovered within the financial year (in line with the Department's financial period), rather than the SENI financial period, however it is recognised that this was as a result of the contract period.
- 4.15 DETI BDLU monitored progress against targets on a monthly basis. SENI provided a monthly report detailing progress against targets to DETI BDLU, which was followed up with monthly face to face meetings with both parties. Communication between DETI BDLU and SENI was good, with monthly meetings providing the opportunity to discuss and address pressing issues.
- 4.16 Minutes were not taken of these meetings, but any issues which were raised were followed up by email. In addition to monitoring progress, BDLU provided general advice around reserves policy, corporate governance and procurement guidance. Originally it was envisaged the monthly reporting and monitoring would shift to quarterly, however early on DETI BDLU's preference was to maintain monthly reporting and monitoring.
- 4.17 SENI annual reports were shared with DETI Senior Management and with relevant departmental colleagues.

- 4.18 In terms of future monitoring of performance for projects of this nature, it is suggested that the end of year impact report should clearly identify the annual targets and clearly classify what targets were fully achieved, partially achieved (quantified where possible) and not achieved. This should include a clear rationale for targets which weren't met or only partially achieved and any mitigated circumstances.
- 4.19 The end of year impact report should continue to provide a clear financial breakdown for the relevant operating year. This should include income and expenditure at a high level as presented in the SENI Year Three Impact report. DETI BDLU should take steps to independently verify the 'Other income' raised by SENI, perhaps via the Invest NI claims assessor or audited accountants (if applicable).

Survey of members

- 4.20 The survey, which was run in the first two weeks of October 2015, received 50 responses from 146 members identified by Social Enterprise NI. Full details of the survey findings are included at **Annex C**. In the main, the performance of Social Enterprise NI was broadly rated as either very, or quite effective. Thoughts on what other opportunities there were for Social Enterprise NI to enhance their performance or impact were quite broadly ranged.
- 4.21 Members were asked a range of questions focussed on the operational aspects of Social Enterprise NI's work including customer service which was generally viewed in a positive light. The rating of Social Enterprise NI in relation to its importance for the individual organisation was somewhat less positive than the similar question asking about the importance of Social Enterprise NI to the sector as a whole.
- 4.22 Members were also asked a number of questions specifically addressed at the Social Economy sector as a whole in Northern Ireland. Members were asked to identify what they thought were the three main strengths of the Social Economy sector in Northern Ireland. In addition a broad range of

strengths were identified and comments on both these areas are detailed below.

- 4.23 On that basis, Social Enterprise NI members' highest priorities were those activities focused on: influencing wider Governmental policy; raising awareness; and facilitating collaboration and linkages with other networks. The supply chain/"buy social" agenda option was a top priority for 7 Social Enterprise NI members but appeared less of a priority for the remaining members. The net outturn of this was the 4th priority ranking. Overall, the activity of promoting existing support programmes or initiatives to the sector was the lowest prioritised activity by some margin.
- 4.24 The overwhelming majority of members thought that there is a need for a representative body for the Social Economy sector in NI.

One-to-one Interviews

- 4.25 Overall, the respondents recognised that there is a need for a representative body for the social economy sector in Northern Ireland. There was overall consensus from members and non members that an organisation like Social Enterprise NI is needed in the sector. Full details of the one to one interviews are included at **Annex D**.
- 4.26 A summary of the views are as follows:

Views on performance of Social Enterprise NI

- Respondents feel strongly that a representative body is required for the SE sector.
- The performance of Social Enterprise NI over a range of areas was broadly rated by members as being either very, or quite effective.
- Members were particularly positive in assessing Social Enterprise NI's performance in relation to raising and promoting awareness of the sector and

in representing the collective interests of the Social Economy sector and lobbying on behalf of the sector.

- Members' assessment of the development of new products/services and the influencing of NI Executive Social Economy policy by Social Enterprise NI reflected slightly higher levels of lack of knowledge or awareness by members in relation to the performance of Social Enterprise NI.
- In terms of what other opportunities members felt there were for Social Enterprise NI to enhance their performance or impact, common themes included activities related to linkages or partnerships within and across sectors and to activities linked with lobbying or advocating on behalf of the sector.
- Members were also asked a number of additional questions focused more on operational aspects of Social Enterprise NI's work. In the round, the rating of Social Enterprise NI activity was positive with most members viewing Social Enterprise NI as being very or quite effective. Members' ratings in respect of Enterprise NI's customer service and in their support to the sector as a whole in achieving its objectives were particularly positive.
- The perception of respondents outside Belfast would suggest that Social Enterprise NI activities had started out having a regional focus, however in years 2 and 3 these had become more Belfast centric, with services more concentrated in the Belfast area.

Views on the Social Economy sector in NI

- Members were asked to identify what they thought were the three main strengths of the Social Economy sector in Northern Ireland. Common themes which emerged included: the value brought by the people involved in the sector; that organisations within the sector provide a local community focus; the flexibility, diversity and sustainability of the sector; and the sector as a vehicle for providing an environment for entrepreneurship.
- Social Enterprise NI members were asked to prioritise 10 individual activities in terms of priorities for the future development needs of the Social Economy sector. Members' highest priorities were those activities focused on:

influencing wider Governmental policy; raising awareness; and facilitating collaboration and linkages with other networks.

- In terms of any other potential priority areas for the future development needs of the Social Economy sector in Northern Ireland, some common themes which emerged from the comments received included: greater linking/partnership working with both the public and private sectors; and enhancing the weight attributed to social value in the procurement process.
- Social Enterprise NI members were asked to consider the implications and potential impacts of there not being a representative body and whether there was a need for a representative body for the Social Economy sector in NI. Members were more pessimistic about the potential impacts on the sector as a whole of not having a representative body in the future in comparison to their views of the potential impact on their own organisation. The overwhelming majority of members thought that there is a need for a representative body for the Social Economy sector in NI.

Assessment on VFM

- 4.27 As indicated earlier, SENI proposed and agreed annual operating plans with DETI BDLU which were congruent with the high level objectives identified in the projects Economic Appraisal 'Social Economy Work Programme' (21 March 2012).
- 4.28 It is clear from the progress against operating plan section that SENI has made progress against all its targets. SENI has either fully achieved (80%) or partially achieved (20%) of the targets identified in the operating plans over the three year period. Of the targets which were partially met, and could be quantified (4), SENI achieved circa 75%-92% of the target. In instances when actions were not fully addressed and could not be quantified, this was largely due to a shift in circumstances, the interests of stakeholders or delivery against targets was delayed.

- 4.29 The project was delivered within the £450k costs identified in the original business case. The actual project was delivered £27.5k (or 6.1%) under budget.
- 4.30 In relation to the survey undertaken by DETI ASU (n=50, 34% response rate) among SENI members in the main the performance of Social Enterprise NI was broadly rated as either very, or quite effective across 9 key areas (ranging from 82%-98%, average 88%). Furthermore, the rating of SENI activity was very positive with most members viewing SENI as being very or quite effective across 5 areas (ranging from 69% - 100%, average 88%).
- 4.31 Ultimately, 95% of the survey respondents considered there is a need for a body to represent the Social Economy sector in Northern Ireland. SENI members were more pessimistic about the potential impacts on the sector (95% perceived at least some negative impact) as a whole of not having a representative body in the future in comparison to their views of the potential impact on their own organisation (83% perceived at least some negative impact).
- 4.32 The survey asked SENI members to prioritise future development needs for the Social Economy Sector in Northern Ireland. The top three identified were 'Influencing NI Executive Social Economy policy development', 'Raising awareness of the sector' and 'Facilitating collaboration between Social Enterprises and providing links with other networks'.
- 4.33 BDLU held 1 to 1 interviews with ten key stakeholders. Overall, the perceived progress by stakeholders against the objectives of SEWP is largely positive. When benchmarked against other SE networks in the UK, it was considered that SENI punched above its weight and has built good relations with other regional networks. However a view was expressed that SENI should be more innovative and challenge government and that other representative bodies were more effective particularly in their broad strategic approach and marketing.

- 4.34 It was clear there was strong support for a representative body in the Social Economy sector. With the absence of a representative body in the future this would be seen as a backward step and would result in the sector losing momentum.
- 4.35 In conclusion, SENI either fully (80%) or partially achieved (20%) its targets, was delivered within budget, and the evidence from both the survey of SENI members and interviews with stakeholders indicate a high level of satisfaction with SENI and the need for a representative body of the SE sector.
- 4.36 As a result, it is clear the project did represent Value for Money. In terms of moving forward, there is clear support from stakeholders and SENI members, for the project to continue. This should be subject to a further Economic Appraisal and take into account the lessons learned throughout this project.

5. CONCLUSIONS

- 5.1 In conclusion, there is significant ongoing support for a representative body for the social economy sector in NI. Social Enterprise NI has performed well with a small team and they have created a positive brand image and have performed particularly well in raising awareness at the NI Executive level and generally with local politicians through the recently formed All Party Working Group.
- 5.2 Overall, there is a perception within the sector that the social economy is not high on the agenda of government departments and that this is providing a difficult challenge for Social Enterprise NI in terms of meeting the needs and requirements of the sector. The respondents commented that in order for Social Enterprise NI to have a stronger voice, through increased engagement with government departments and local councils to promote a better understanding of the needs and concerns of the sector. Social Enterprise NI needs to influence government policy and provide appropriate guidance to government.

5.3 There was a very strong view that while a representative body should also target the Voluntary and Community sector it needs to be distinctive from the Voluntary and Community sector and that policy development for social economy should stay within the department with responsibility for the economy, in order to ensure a focus on 'enterprise' and 'social business'.

5.4 In terms of how the sector should be developed in the future and potential priority areas to develop the sector it is felt that a representative body should focus on a number of areas, including:

- More enhanced advocacy role particularly with Government
- Networking and building strategic alliances with sub-regional forums.
- Explore and promote a 'co-production' model where resources are shared.
- Should be more product/trade focussed rather than service delivery.
- Needs to be more focussed on income generation while not competing with members.
- Provide a 'matchmaking' service in respect of trading opportunities.
- Work more with the Voluntary and Community Sector around social innovation and Investment readiness
- Focus on investment readiness, community shares, board development and generally building the capacity of social economy organisations.
- Develop a 'buy social' tourism guide with social enterprise suppliers.
- Promote the concept of 'social value' into commissioning. Lobby for a social value act to 'put a duty on to the power' which already exists.
- Need to look at the supply chain in areas such as tourism, food, cleaning, security etc
- Promote use of social impact measurement.
- Focus on enterprise is paramount.

5.5 While the social enterprise landscape has not materially changed over the period of the Social Economy Work Programme there is a clear recognition that the sector has benefitted from the delivery of this programme and there is still a recognisable need to continue providing a similar support in the future.

These benefits are highlighted in the Year 2 and Year 3 SENI Impact reports (none available for Year 1) which are attached at **Annex E** and which clearly demonstrate the social value of this programme to its members and wider community.

**DEPARTMENT OF ENTERPRISE TRADE AND INVESTMENT (DETI)
SOCIAL ECONOMY EVALUATION ASSIGNMENT
Evaluation Objectives**

SOCIAL ECONOMY EVALUATION

The evaluation should address the following objectives:

- (i) Social Enterprise NI performance
 - assess if Social Enterprise NI is effectively representing its members through lobbying and promotion of the sector;
 - assess how successful Social Enterprise NI has been in building its membership and providing quality products and services for its membership;
 - assess if Social Enterprise NI is being effectively managed with an emphasis on good governance, financial management, flexibility to needs, high standards of customer service, and a professional approach to on-going organisational development; and
 - to what extent the strategic objectives have been achieved in lines with the objectives of the Social Economy Work Programme as outlined below.

- (ii) Needs and priorities of the Social Economy sector post 2015
 - Role of the Social Economy sector and its unique value in terms of economic, social and environmental impact in the Northern Ireland context;
 - establish the range of new support products which the sector feel would increase the economic, social and environmental impact of the social economy;
 - assess areas where the sector feels it can assist NI Executive departments and local government deliver public services; and;
 - assess if there is a need for continued government intervention to support a representative body for the sector.

Objective of the Social Economy Work Programme (SEWP)

The overall objective of SEWP is to identify and implement a programme of initiatives to enable the continued growth of a sustainable social economy sector, through a collaborative network / consortium of social economy stakeholders. The core programme objectives are to:

- Promote and raise awareness of the social economy sector across Northern Ireland;
- Provide the impetus for collaboration to ensure the collective weight and capacity of the social economy sector and broader third sector are realised;
- Develop new products to support the sustainable development of the social economy sector;
- Pilot test product/service delivery to develop the social economy sector;
- Communicate and promote the full breadth of existing support programmes/initiatives to the sector including local government initiatives;
- Promote good practice both within the sector and about the sector; and
- Represent the collective interests of the social economy sector.

Management of the SEWP

- (i) Maintain an appropriate management information system to assist accurate reporting and future evaluations or audits of the programme when required;
- (ii) Submit a formal monthly report, to include supporting financial information, to DETI on programme performance and meet the DETI Programme Manager monthly to ensure that identified programme objectives and agreed targets are being achieved. A monthly reporting template will be developed by the Service Provider and agreed with DETI. This arrangement may be changed to a quarterly basis on agreement by both the Service Provider and DETI;
- (iii) Meet the cross-departmental Social Economy Policy Group as required during the programme. Management reports will be provided to the SEPG

on a yearly basis. The precise nature of the reports will be agreed with the appointed service provider;

- (iv) Work with the DETI Programme Manager to address and resolve any issues in programme underperformance or dissatisfaction.

Delivery of the SEWP

- (v) Co-ordinate and manage the delivery of the programme elements and ensure optimal results are achieved;
- (vi) The Service Provider must deliver the agreed SEWP across all of Northern Ireland, including rural areas, as well as providing suitable facilities and equipment for programme delivery where appropriate. The SEWP must be accessible to all communities within Northern Ireland and the community background of beneficiaries must be monitored to ensure there is a balance in terms of community impacts.
- (vii) Provide a detailed implementation plan for Year 1, with outline implementation plans for Years 2 and 3 which will be agreed with DETI in advance of each year.

Annual progress against SENI Operating plan 2012/13 to 2014/15

Year 1

SENI's 'Year One Key Achievements Summary Report' provides great detail on progress against targets. This includes classifying targets as 'Achieved', 'Partially Achieved' or 'Not Achieved'. All of the actions were either achieved or partially achieved. The report provided a rationale for targets which were only partially achieved and couldn't be quantified.

Those targets which were partially met and quantified were largely (circa 75% to 80%) achieved. The rationale for the partially met targets which couldn't be quantified varied. For example, the action '1 new finance product to be launched' was partially addressed by building good working relationships with the Building Change trust who were working on a joint package of finance and grants for the sector.

Furthermore, there were a number of actions, which progress was made against, although ultimately there was a lack of interest with stakeholders. For example Engagement with MLA's suggested that there may not a huge political will to implement and monitor social clauses in the procurement process. SENI also engaged with CPD on this matter.

Finally, only partial progress was made against the target of '50 young people annually working towards level 2 qualification' in the first year. Although SENI was able to build strong working relationship with a number of partners, the timetables and budgets were already set for the academic year. With that said, it was well received and was carried through as a theme into the year 2 action plan.

Overall, progress was made against all the actions identified under the year 1 operating plan and was either achieved (71%) or partially achieved (29%). Table X below details the monitoring return for year 1 targets which were only partially achieved.

Table 1: Year 1 Actions which were partially achieved

Output Indicators	Outcome indicators	Detail
New finance product launched to group of 30 participants	1 new finance product to be launched	A new social finance product has not been launched this year. SENI has build good working relationships with Building change trust, who are working on a joint package of finance and grants for the sector.
Conduct annual monitor of number of public sector contracts using social clauses	2 x benchmark audits monitor changes	Engagement with MLAs suggest that there may not be huge political will to implement these more fully into procurement process. The programme director held a meeting with the head of CPD to discuss the issues the sector has around social clauses and explore some of the barriers.
Mentoring 50 young people in total over the year	12 ambassadors trained as mentors	75% achieved
50 young people from a range of organisations better	50 young people annually working towards level 2	Owing to the DETI work programme contract beginning on 1 st October. School timetables and budgets were set for the year making delivery

equipped in knowledge of SE	qualification	challenging. There is growing interest in the uptake of the qualification although the systems required to introduce the new qualification within schools and colleges has taken longer than anticipated.
Formation of all party working group for SE	1 meeting held for all party working group	The achievement of this target is dictated by the systems that exist within the NI Assembly and political parties which is outside of SENI control. Awaiting nominated Alliance candidate and a response from the DUP.
Quarterly meetings to be held by Regional Networks	Quarterly meetings held with 4 guest speakers during year 2 x Action learning sets	SENI delivered 3 out of the 4 proposed regional network meetings, but numbers and interest varied significantly. There has been a greater interest in attending events and face to face meetings subsequently SENI has reallocated its staff resources to do this.
Ongoing e-communication available to all members and wider CV and SE sector on Website	Website created Inspiration map created tracking SEs in NI Quarterly ezine	80% achieved
100 delegates attend 2 day conference event	Annual awards and conference	80% achieved
Develop range of shared principles	Establish a code of practice for SE sector organisations	After consulting with the sector and building a membership. SENI conclude NI is not yet ready for a code of practice. Rather there is a need to further understand the issues.

Year 2

There is a notable change in the template of the SENI end of year summary report between years 1 and 2. This may be as a result of the change in Business Partner. Unfortunately, the end of year summary template for years 2 and 3 doesn't provide a clear conclusion whether targets were met. This is something which should be addressed in the reporting of future projects. This forms one of the lessons learned in this PPE.

Furthermore the year 2 summary report doesn't provide a detailed breakdown of other income streams over the operating year or appear to provide a rationale for why the two partially achieved targets weren't fully achieved. However, this information was subsequently provided for year 3, in the final end of year report.

As a result, progress against year 2 and 3 targets have been identified via SENI last monthly monitoring return for the relevant year. SENI fully achieved all but two of its year 2 targets (see Table 2). With that said, SENI made progress against the two targets. This included continuing discussions with the Lottery to input and shape new programmes and to seek innovation/programme funding and formation of one working group, the formation of a second group would lead to duplication with Building Change Trust.

Table 2: Year 2 Actions which were partially achieved

Output Indicators	Outcome indicators	Detail
Working with partners to develop a new kind of financial product for the market based on a business angel concept	1 new Social finance product launched in partnership with Social Finance Org 1 new SE signed up	Big Society Capital invest £1million into Social Care for older people to CLARE (Mount Vernon community development forum). Meeting held with lottery 2 nd June to explore and feed into new programmes and pitching for some kind of innovation monies. Also discussed resourcing Social Saturday after pilot testing this year.
Form 2 working groups based on themes	6 x meetings (3 per theme) 2 x terms of reference developed 2 x recommendation docs	Only 1 working group was formed owing to the fact that Building Change Trust rolled out a whole piece of work on Social Innovation (explanation given in Yr 2 end report) This would have been duplicated work. Social Enterprise NI did take part in the stakeholder groups formed and subsequent work with the Young Foundation and DSD. HSC working group formed. 3 thematic groups facilitated with approx. 20 stakeholders to develop a report on the status of social enterprise involvement in the HSC Sector but also potential to grow and develop opportunities/impact. Report has been finalised, supplementary case studies being added December 2015. As a result of the thematic group work and report findings/recommendations, Social Enterprise NI helped shape the Terms of Reference as part of stakeholder group for the DHSSPS Health Innovation Fund.

Year 3

In year 3, the vast majority of actions were fully achieved. Progress was made against the remaining seven partially achieved actions. One of the partially achieved targets was easily quantified and largely achieved, with consortium members attending 11 out of a target of 12 events.

Three of the targets experienced time delays, with two of the scheduled events taking place in October (Just outside the operating year) and a third to be rescheduled for the autumn.

The final three targets required interaction with stakeholders which were not forthcoming. SENI was unable to achieve a Lunch with CBI, however SENI has attended a Northern Ireland Assembly and Business Trust (NIABT) event. Furthermore, SENI has not yet been able to secure a presentation to Councils or establish a Council Stakeholders Group.

Finally the Regulator of Community Interest Companies (CIC) was recently appointed and has asked to postpone an event with SENI. It is unclear at this point how CIC wish to progress, but SENI hopes something may transpire in January – March 2016.

An overview of actions which were not fully achieved, were identified in the finally monthly monitoring return for year 3 are identified in Table 3 below.

Table 3: Year 3 Actions which were partially achieved

Output Indicators	Outcome indicators	Detail
UK wide day promoting the services and products of SE across the UK. Local events and media campaigns	1 Social Saturday Event	Date 10 th October project over 30 events and promotions for NI events planned
Engaging with private sector industry bodies	1 Lunch with CBI	This event will not be taking place, we have engaged however through BITC members and the BIFNI network and membership and events at NIABT
A one day conference bringing together members and wider stakeholders to learn, network and discuss what's topical.	1 Conference	Early bird bookings now closed for new date of 22 nd Oct
Providing accredited learning opportunities for those interested in social enterprise	2 SEQ Mentor training session 1 ILM accredited Course	Date rescheduled looking at bespoke session for Hydebank college in autumn
Support and engage with councils as they explore their role in supporting and developing social enterprises	1 Council Stakeholders group established 1 presentation to CEO's Group or NILGA conference	Names through from 5 councils and all been written to some are not ready to nominate as yet Unable to secure this, made enquires but not forthcoming
Working with CIC regulator with better promote and understand the legal structure	1 event with CIC regulator	CIC regulator have asked to postpone this event. New regulator and unclear how they wish to progress, perhaps Jan – March 16
Attending and representing the sector at a range of events	12 events attended by consortium members	Attended 11 events

Survey of Social Enterprise NI members

BACKGROUND

In taking forward the evaluation of Social Enterprise NI, the Department for Enterprise, Trade and Investment (DETI) identified three discrete approaches comprising: desk-based evidence gathering and review; semi-structured interviews with key stakeholders; and a survey of Social Enterprise NI members.

On that basis, statisticians within DETI undertook the development, implementation and reporting of the survey of Social Enterprise NI members to gather members' views and opinions on: the performance of Social Enterprise NI over the period; the challenges and opportunities that face the sector now and in the immediate future; and on how a representative body might best represent members and the sector in the future.

APPROACH

Mindful of minimising respondent burden, a short questionnaire was developed to gather key information in an efficient manner and comprised some 15 individual questions. The questionnaire was developed for survey administration through the on-line SurveyMonkey package. Social Enterprise NI provided up-to-date e-mail contact details for their members and, in total, 146 individual contacts were identified covering the membership of Social Enterprise NI.

To alert Social Enterprise NI members to the survey, an advance e-mail was issued from DETI on the 24th September 2015. An e-mail containing a link to the on-line survey was issued by DETI statisticians on the 30th September with a completion date of the 14th October 2015. In an attempt to boost responses, Social Enterprise NI agreed to issue an encouraging e-mail to their members and this was subsequently followed by a reminder e-mail issued by DETI statisticians on 7th October 2015.

The volume of responses to the survey is detailed below:

Surveys Issued	146		Survey clicked through but not completed	Completed Survey responses
E-mails opened	80	→	55	→ 50
E-mails unopened	66			

The 50 survey responses collected represent a response rate of 34% based on the 146 e-mail invitations issued which is an acceptable response rate for a survey of this nature. Calculating the response rate only on the basis of e-mails opened yields a response rate of 62%.

RESULTS

Figures are presented in terms of percentages which are, in turn, based on the maximum of 50 Social Enterprise NI members who responded to each question and should be interpreted on that basis. Qualitative responses to 'open' questions that required members to write in their views and opinions are reported as received although some minor anonymisation/editing was conducted as required.

Views on the performance of Social Enterprise NI

A series of questions asked members to rate in their opinion how effective the performance of Social Enterprise NI had been over a range of areas.

Overall, how effective would you rate the performance of Social Enterprise NI in:	Very Effective	Quite Effective	Not Very Effective	Not At All Effective	Don't Know
	%	%	%	%	%
Raising and promoting awareness of the sector	54	44	2	-	-
Disseminating learning and best practice within the Social Economy sector	43	51	4	-	2
Facilitating collaboration between social enterprises and providing links with other networks	36	62	-	2	-
Developing new products/services to support the sustainable development of the Social Economy sector	22	52	14	-	12
Promoting existing support programmes or initiatives to the sector including local government initiatives	37	55	4	2	2
Provision of relevant mentoring/training opportunities	32	50	8	4	6
Representing the collective interests of the Social Economy sector and lobbying on behalf of the sector	56	38	2	2	2
Influencing NI Executive Social Economy policy development	28	50	4	2	16
Providing leadership to the Social Economy sector	48	38	8	2	4

In the main, the performance of Social Enterprise NI was broadly rated as either very, or quite effective. The two questions in relation to the development of new products/services and the influencing of NI Executive Social Economy policy development reflected slightly higher levels of lack of knowledge or awareness in relation to the performance of Social Enterprise NI.

Social Enterprise NI members were asked to identify any other opportunities they felt there were for Social Enterprise NI to enhance their performance or impact and comments received are detailed below.

What other opportunities were there for Social Enterprise NI to enhance their performance or impact?
(Please write in)

Developing sustainable product/service
Establishing political awareness at Stormont and the enlarged councils alongside developing better understanding among senior civil service personnel
Greater Partnerships with Health Trusts
Have more of a regional presence, support to aspiring SEs as opposed to those that are established.
Impact could have been increased, particularly with members of the public, still lacking. More innovative training, like Big Questions events.
Informing the PfG 2016/20: Informing EU RDP 2020
Linking up social enterprise who have traded for several years
More funds made available to get started
Networking and show casing of best practice
Partnerships with commercial sector
Promoting linkages between social enterprises
Regular ongoing training & events similar to Firstport Scotland
Show case at Stormont
The development of a Social Value Act for N Ireland would be a game changer for Social Enterprise the work has begun on this and should be a priority going forward. Building social value into the competitive part of public service procurement would complement the Act and create space for greater Social Enterprise growth.
Through separate funding sources

Thoughts on what other opportunities there were for Social Enterprise NI to enhance their performance or impact were quite broadly ranged. Some themes emerging from the comments provided included: activities related to linkages or partnerships within and across sectors; and to activities linked with lobbying or advocating on behalf of the sector.

A number of additional questions focused specifically on members' assessment of specific aspects of Social Enterprise activity.

	Very Effective	Quite Effective	Not Effective	Very Effective	Not At All Effective	Don't Know
	%	%	%	%	%	%
From your experience, how effective has Social Enterprise NI been in responding to the specific needs of your organisation	43	45	6	-	-	6
From your experience, how effective has Social Enterprise NI been in maintaining high standards of customer service	59	41	-	-	-	-
In your opinion, how effective has Social Enterprise NI been in developing itself as an organisation	46	42	6	-	-	6
Overall, how important has Social Enterprise NI been in supporting your organisation to achieve its objectives	23	47	21	2	2	6
Overall, how important has Social Enterprise NI been in supporting the Social Economy sector in achieving its objectives	51	43	-	-	-	6

In the round, the rating of Social Enterprise NI activity was very positive with most members viewing Social Enterprise NI as being very or quite effective. Members' ratings in respect of Social Enterprise NI's customer service and in their support to the sector as a whole in achieving its objectives were particularly positive. The rating of Social Enterprise NI in relation to its importance for the individual organisation was somewhat less positive than the similar question asking about the importance of Social Enterprise NI to the sector as a whole.

Views on the Social Economy sector in NI

Members were then asked a number of questions specifically addressed at the Social Economy sector as a whole in Northern Ireland. Members were asked to identify what they thought were the three main strengths of the Social Economy sector in Northern Ireland and comments received are detailed below.

A broad range of strengths were identified. Some common themes which emerged from the comments provided included: the value brought by the people involved in the sector; that organisations within the sector provide a local community focus; the flexibility, diversity and sustainability of the sector; and the sector as a vehicle for providing an environment for entrepreneurship.

What do you think are the three main strengths of the Social Economy sector in Northern Ireland? (Please write in)

Huge amount of Social capital released. Release of potential in Communities to "self-help" without grant assistance. A growing "commerciality" & value for money / harnessing previously untapped business potential.

A number of forward thinking organisations involved in social economy sector, There are a number of new models emerging resulting in a stronger social economy,

Business focus, size, activity

Closeness to the people

Common goal to support communities.

Community Buy In, Health Promotion, The Staff of Social Enterprises are like no other!

Delivery of services in a more cost effective manner than public sector delivery

Diversity & Governance/Cooperation & Collaboration/Sharing Resources & Best Practices

Employment opportunities/diversity/sustainability

Enterprise, sustainability and independence

Entrepreneurial spirit / risk-acceptance / perseverance

Flexibility to respond to market. Awareness of need. Innovative

Geographical Coverage: Breadth of Business Interest: Inter-Regionally Connected

Getting things done, promoting social agenda, promoting enterprise

Ideas, vision, 'get to it' approach

Innovation and dogged determination

It's local; it's innovative/effective and it's growing.

Leadership, Commitment & Independence

Local people, supporting local communities with financial benefits remaining in Northern Ireland

Local, flexible, passionate

Networking, Access to information & advice, personal contact with support workers is exceptional

Partnership Working, Information Sharing, Knowledge

People, capacity, ambition

People, commitment, expertise

Positive Procurement to benefit community, Social Impact, Ethical conduct of in business

Proven track record of social impact / greater awareness of the sector's ability to successfully address social & environmental issues within government and the wider economy through sustainable enterprising models / growing interest and more people seeking to get involved in social enterprise and the willingness to learn & develop skills

Quite diverse. Still in growing stage and give back to community

Responsive / geographical spread / community led

Showing the third sector how to raise funds from effort

Small business development, small business support, job creation

Social need/volunteering/potential economic driver

Value for money, social impact, volunteerism

Versatility; flexibility; hard working

Great connectivity across sectors within the social economy due to scale of the sector. Everyone knows everyone – this can also be a weakness; There appears to be a commitment to the ethos of Social Enterprise and a desire to move forward on an enterprise footing adding to social impact; Willingness to collaborate with and share learning from & with other parts of the UK...

Social Enterprise NI members were then asked to prioritise 10 individual activities in terms of priorities for the future development needs of the Social Economy sector.

Which of the following activities would you prioritise in terms of the future development needs of the Social Economy sector in Northern Ireland?	Priority
Influencing NI Executive Social Economy policy development	1
Raising awareness of the sector	2
Facilitating collaboration between Social Enterprises and providing links with other networks	3
Promoting the supply chain/'buy social' agenda	4
Developing new products/services to support the sustainable development of the Social Economy sector	=5
Representing the collective interests of the Social Economy sector and lobbying on behalf of the sector	=5
Promoting social impact measurement	=5
Disseminating learning and promoting best practice within the Social Economy sector	6
Provision of relevant mentoring/training opportunities	7
Promoting existing support programmes or initiatives to the sector including local government initiatives	8

On that basis, Social Enterprise NI members' highest priorities were those activities focused on: influencing wider Governmental policy; raising awareness; and facilitating collaboration and linkages with other networks.

The supply chain/'buy social' agenda option was a top priority for 7 Social Enterprise NI members but appeared less of a priority for the remaining members. The net outturn of this was the 4th priority ranking.

There was no difference in the overall prioritisation of the development of new products/services, lobbying on behalf of the sector; or promoting social impact measurement.

Overall, the activity of promoting existing support programmes or initiatives to the sector was the lowest prioritised activity by some margin.

Members were then asked to suggest any other priority areas not mentioned above for the future development needs of the Social Economy sector in Northern Ireland and the responses received are detailed below. Some common themes which emerged from the comments received included: greater linking/partnership working with both the public and private sectors; and enhancing the weight attributed to social value in the procurement process.

Can you suggest any other priority areas for the future development needs of the Social Economy sector in Northern Ireland? (Please write in)
Becoming a service provider to government and getting paid to do that
Collaboration: Between Social enterprises, with public and private sector
Consider benefits of all-island collaborations and partnerships
Cross border development
Economy
Exporting products & services – international outlook
Financial management training
Funding to support SE's through their various stages of growth
Greater understanding of procurement and ability to engage in procurement competitions
Impact
International linkages and best practice/exemplars
Social Enterprise needs to remain a policy area for DETI so the joining up of private and SE enterprise initiatives can benefit NI.
Stormont and Local councils really need to support it in a practical way not just pay lip service to it especially in the services they outsource
Support for micro enterprise development
Supporting disadvantaged groups (Health)
Tendering and Procurement needs to include social value
The Executive and all departments be more involved and offer seed funds
The provision of a Social Value Act is a game changer
There can be a gulf between start up/micro and established businesses with Hubs supporting early/ concept stage enterprises. There needs to be more support for social enterprises that are 1 year in business to scale up, with funding and business development support. This will bring great ideas with early success in N Ireland through to sustainability.
Trading partnerships with private sector
Value act legislation
Learning & development to support Social Enterprises

In terms of new support products/services members felt would increase the impact of the Social Economy sector in Northern Ireland, a range of comments were received.

Can you suggest any new support products/services you feel would increase the impact of the Social Economy in Northern Ireland? (Please write in)
A Social Enterprise Tender Process
Access to trained graduates that may be currently unemployed
Business mentoring – proven tool for SEs to develop and grow their respective businesses
Explore & identify new market opportunities
Housing Development
International Benchmarking, Concentrate on developing and delivering a high standard of goods and services of the SE's
Linkages with larger companies for B2B opportunities
Mainstream training for sector
More personnel within SENI
More proactive supports/structures from new councils
Need to get Community Asset Transfer fully functioning
New social investment products
Positive procurement to help bring jobs to Northern Ireland economy and have a positive social impact for the community
Professional support service to assist social enterprises with procurement competitions
Shared services
Social Return on Investment Practitioner Training. Support products such as the Young Foundation Accelerator programme to aid scaling up. Increased pilots for social enterprises beyond concept stage to assist growth and wider roll out of effective programmes
Start up capital/investment capital
The current SE NI body with its new company status should be the prime policy body government departments engage with
Investment in learning and development to complement business support and investment

Social Enterprise NI members were asked to consider the implications and potential impacts of there not being a representative body and whether there was a need for a representative body for the Social Economy sector in NI.

	A lot of negative impact	Some negative impact	No negative impact at all	Don't Know
	%	%	%	%
If there was no Social Economy representative body in the future, what kind of negative impact would that have for the Social Economy sector in achieving its objectives	71	24	5	-
If there was no Social Economy representative body in the future, what kind of negative impact would that have for your organisation in achieving its objectives	29	54	15	2

Social Enterprise NI members were more pessimistic about the potential impacts on the sector as a whole of not having a representative body in the future in comparison to their views of the potential impact on their own organisation.

	Yes	No	Don't Know
	%	%	%
In your opinion, is there a need for a representative body for the Social Economy sector in Northern Ireland	95	2	2

The overwhelming majority of members thought that there is a need for a representative body for the Social Economy sector in NI.

Finally, Social Enterprise NI members were asked for any other comments, and those received are detailed below.

Are there any other comments you would like to make? (Please write in)

Amazing what the team can achieve with their limited resources. A valuable resource in NI to support the sector - much needed

Being somewhat cynical when it evolved I now see the benefit of SENI and the role it has to play in helping us shape the SE sector into the future. I'd suggest it promises less and delivers on a few key areas. More investment needs to be put into PR/Marketing and focus on helping sector to do more good business. Keep it up!

Communication is always good

Having completed SROI Practitioner training, it would be good for more widespread measurement of Social Value made by organisations (both positive or negative) to be considered alongside enterprise value/income. This clarity would drive new and better solutions in the social enterprise sector and also inform decision makers. There is a need for a more cohesive, confident and defined statement of social value which should be user led and inform policy

...Social Enterprise NI have been a highly important organisation in promoting the social economy in rural areas but also in assisting rural organisations with issues of sustainability through social enterprise. DARD have called upon their service on a number of occasions and development of the social economy is a key area for the department. It is my view that social enterprise should remain within the economic department under the restructuring of departments.

I believe both J & A as paid staff members have more than 'punched above their weight' in terms of the resources (human & financial) at their disposal. Whilst the SENI partners offer additional resources and support...SENI as its own entity needs to develop its capacity as an organisation to further develop SE sector/agenda. I am personally a BIG advocate/supporter of social enterprise. I believe in its role and value to business & society. It's far from 'perfect' but in NI we are at a relatively advanced level in UK & Ireland terms albeit lag behind parts of EU e.g. Spain, France, Italy. We just need business, policymakers & politicians to firstly understand the SE economy (some do) and to support its growth & development across NI. SE needs to work with/across all sectors - public, private & third to work effectively. However, we also need an international outlook to 'export' products/services but that's not so easy to convince the like of Invest NI to back a social enterprise to do so...that remains a real challenge!

I feel that this body needs supported in the long term

If Government wishes to see the development of a thriving NI social economy and shift in the 3rd sector from being grant driven to enterprise driven organisations then it needs to create markets for social enterprises to enter by doing less service delivery and outsourcing more

SENI has done a great job of ensuring the key influencers in NI know of the presence, the power & the potential of the SE sector

SENI have been very supportive of our work, they are under staffed for the amount of work required within the sector

SENI should be a driver and facilitator of economic activity

Since our foundation in 2012 SE and in particular S M has been a fantastic support to our organisation not only as our mentor but continues to be accessible even when our initial programmes were completed

Social Enterprise NI doing a great job - needs more time to develop - needs to maintain its excellent CEO

Social enterprises have a social, community, ethical approach to business and work for the benefit of the

community. Social enterprise should organise collectively to respond to tenders from central and local government as well as from Europe

The current SENI body needs to be formally recognised by the Assembly as the only SE body speaking on behalf of the Social Enterprise sector. This avoids confusion and keeps the policy development at the point of all it does

This should be part of a bigger representative body for VCSE, not on its own

We need joint up approach from all departments including INI

There is some excellent work going on, but not enough coordination. There is a need for more support in relation to peer support in creating safe space for learning & development. Although SENI are doing a great job, if you look to the Scottish example there are many other ways the Gov't can help nurture a thriving social economy. Examples include effective business support, coordinated learning and development, joined up legislation & investment. Existing hub structures in NI are to be welcomed but there is a need for a longer term strategy to be put in place. We have seen the benefits of sustained investment in Scotland reflected in the results of the recent census: 5,200 social enterprises turning over £3.6bn. The investment in an eco-system of support provides a financial & social return.

SOCIAL ECONOMY EVALUATION ASSIGNMENT – SUMMARY OF ONE-TO-ONE INTERVIEWS

As part of this exercise, DETI sought to capture the views of the key stakeholders including Social Enterprise NI Board members and social economy support organisations. These discussions were taken forward through 1-1 interviews during August/ September/October 2015 and were conducted in line with a series of suggested topics.

Interviewees were assured that their comments would be treated in confidence and as such the following is a summary of the key points raised by interviewees:

How do you think the Social Enterprise NI has performed against the following core objectives of SEWP:

- **Promote and raise awareness of the social economy sector across Northern Ireland;**

On the whole SENI has performed well with a small team. They have created a positive brand image and have performed particularly well in raising awareness at the NI Executive level and generally with local politicians through the recently formed All Party Working Group.

SENI has injected a renewed energy and vigour.

SENI has built a credibility within the sector and is very slick with its marketing, has a strong board and has established good networks delivering a limited range of services due to lack of resources.

SENI has developed an identity and unique brand which should not be diluted by the wrong collaborations

Annual Social Enterprise Awards have been very good focus for the sector and very well run

SENI has taken a very pragmatic approach and networking events/peer to peer mentoring/awards events have been very well received.

Good website development has helped raise the profile of the sector and market events.

SENI has injected a 'sense of self' into the sector.

On the negative side there was also the view that the SENI structure was weak and established in an already crowded market which resulted in limitations to its success.

- **Provide the impetus for collaboration to ensure the collective weight and capacity of the social economy sector and broader third sector are realised;**

SENI is fundamentally different to previous models with a focus on networking and making connections within the sector.

SENI activity has created a momentum and has done some good work on capacity building, lobbying/advocacy at the appropriate levels within Government.

SENI represents the interest of the broad social economy sector and also has an eye on the global landscape by encouraging members to participate in the Social Enterprise World Forum.

Engagement of Stratagem has had a positive effect.

Good work being done with Ulster Bank, ASDA and PWC.

Some disappointment was expressed that SENI does not provide enough opportunities for existing social enterprises and that there should be more of a focus on getting access to 'buyers' from the social economy.

Needs to work more with the Social Enterprise Hubs structure to get a foothold across Northern Ireland

Needs better collaboration and co-design

Creation of All Party Group very positive development

- **Develop new products to support the sustainable development of the social economy sector;**

Good range of products with focus on enterprise developed including ILM Level 5, training programmes around governance and procurement, 'Social Saturday', Social Enterprise Awards, showcase days etc.

Showcase events well received

Some good work with Strategic Investment Board re: Social Clauses

Suggestion that more training products are required around legal structures. Range of products has also encouraged participation by a broad audience new to the sector.

Engagement of Social Academy in Scotland has broadened the breadth of experience which local social entrepreneurs have been exposed to and has helped make connections with Scotland and ROI counterparts.

Others thought that new products were a bit spartan however this was a reflection of the marketplace.

What happened to 'Trade Social'. Under used, under promoted. Missed opportunity.

A view was also expressed that the programme of work was too wide and too policy related when more practical support is required.

- **Pilot test product/service delivery to develop the social economy sector;**

Some useful products welcomed such as Knowledge Bank, E-Zine, 'Buy social', meet the buyer events on purchasing/commissioning.

Another view was that it was unclear what the offering was for members and there was not enough of a focus on existing social enterprises.

What happened to 'Trade Social'. Under used, under promoted. Missed opportunity.

- **Communicate and promote the full breadth of existing support programmes/initiatives to the sector including local government initiatives;**

Annual conference and awards event broadly welcomed.

Website and E-Zine very good and well organised events.

Room for improvement however it was recognised that SENI has a small team and a lot was expected from them.

Need to streamline activity and for support structures to be more evident in what they contribute.

Some criticism about SENI's marketing, communications, branding and use of social media. It is sometimes perceived as very limited.

- **Promote good practice both within the sector and about the sector;**

Range of events welcomed including attendance at political conferences, study visits etc

Participation in 4 Nations meetings to be encouraged and developed

Need to work more with local councils given their new role in supporting social entrepreneurship with transfer of functions in 2015

Opportunity has been missed to provide a cohesive regional support as SENI is too Belfast Centric even though the desire is there in rural areas.

SENI is under resourced and this has affected performance and breadth of support.

- **Represent the collective interests of the social economy sector.**

Some good work in this area and has provided a platform for co-operation with the like of the Co-operative society and prepared to collaborate with other social economy organisations for the good of the sector.

SENI has worked very well within the sector and has been proactive in developing collaborative approaches.

More work needs to be done as advocates for the sector particularly with Government departments and local councils. SENI needs to influence government policy and provide appropriate guidance to government.

- **What is your view of the performance of Social Enterprise NI compared to other regional SE networks in the UK?**

SENI punches above its weight and has built up some very good relations with other regional networks through participation in a 4 Nations group.

There was a view that SENI should be more innovative and challenging to government and not be seen as having a specific role in implementing government policy.

Some views were expressed that other representative bodies were much more effective particularly in their broad strategic approach and marketing.

- **Have you views on the effectiveness of the governance, management, staffing arrangements of Social Enterprise NI and have you any suggestions going forward in this regard?**

SENI staff have been very visible and ultimately have added value.

Some concerns were expressed about SENI's positioning and the philosophical question of Private sector versus Social Economy Sector.

Change of lead partner in Year 2 was confusing and concerned about the alignment to an organisation perceived as being from the Private Sector.

Current structure is working alright but there is room to get better with thought to be given to SENI structure and who drives this forward.

Not evident what the partners bring to the organisation and whether or not SENI is positioned right strategically.

- **What impacts do you think Social Enterprise NI has had on the social economy sector in Northern Ireland?**

SENI is driving the social value agenda.

Unclear what impact has been made.

SENI needs to be more visible and to continue to focus on raising political awareness/will.

No evidence of how SENI itself measures its impact.

SENI representation has brought about a degree of cohesiveness though more work needs to be done in this area to effectively be the 'voice of the sector'.

- **Do you feel there is a need for a representative body for the social economy sector? If not, why not?**

Very strong support for a representative body however SENI or its replacement needs to be more de-centralised and have a regional focus rather than being Belfast centric which is how it is perceived.

This is a specialist area which requires specialist representation.

Very important to maintain a representative body to focus on strategic alliances.

Very strong view that a representative body needs to be distinctive from the Voluntary and Community sector and that policy development for social economy should stay within the Department of Enterprise, Trade and Investment with a focus on 'enterprise' and 'social business'.

Strong support for a representative body however it must have the correct structure.

Future Potential for a Representative Body for the Social Economy Sector

- **Do you have any suggestions of how a representative body for the social economy sector should develop in the future?**

Should tap into EU/strategic funds.

Should focus on networking and building strategic alliances with sub-regional forums.

Explore and promote a 'co-production' model where resources are shared.

Develop sub-regional structure of support so representative body can focus on big picture.

Should be more product/trade focussed rather than service delivery.

Needs to be more focussed on income generation while not competing with members.

Better advocacy role.

Provide a 'matchmaking' service in respect of trading opportunities.

Better use of social media.

Time to move on from promotional focus.

SENI should work more with the Voluntary and Community Sector around social innovation and Investment readiness

- **Can you suggest any priority areas or new support products/services which you feel would help the future development of the sector?**

Focus on investment readiness, community shares, board development and generally building the capacity of social economy organisations.

Develop a 'buy social' tourism guide with social enterprise suppliers.

Get social value into commissioning. Lobby for a social value act to 'put a duty on to the power' which already exists.

Promote commissioning for outcomes.

Provide practical support to SEEs to become more entrepreneurial ie Investment readiness, provide a brokerage service for public sector contracts, develop better business skills.

Need to influence developing government policy better. Opportunities within Health and Social Services which are not being fully explored.

Need to look at the supply chain in areas such as tourism, food, cleaning, security etc

Promote use of social impact measurement.

Social Innovation.

Focus on enterprise is paramount.

More of a focus on existing SEEs

- **With a view to building financial sustainability, do you have any suggestions for new service areas for a representative body, and what are your views on the potential willingness of members to pay for such additional service areas?**

General view is that members would be happy to pay more for an improved offering.

SENI needs to focus more on developing their products and crucially income generation.

- **What are your views on what the impact might be on the sector if there was no representative body?**

To have no representative body would be a backwards step and out of sync with other regions.

Expectations have been raised within the sector over the last three years and to not have a specialised representative structure would be detrimental to the social enterprise sector and those in the Community and Voluntary sector with ambitions of becoming more enterprising.

Would like to see an 'impact report'.

Sector would lose momentum and only the strongest would survive.