

# San Francisco/Vancouver

## Report 2010



# San Francisco & Vancouver 2010 Report

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# Introduction

Despite significant challenges posed by volcanic ash, the 2010 International Social Enterprise Study Visit Programme group held their nerve, no cancellations, lots of enthusiasm, and left Scotland on schedule to check out social enterprise in the USA and Canada.

The selection strategy of having a mixed group of practitioners and those working exclusively or extensively to support social enterprise was maintained and our 21 strong group demonstrated many of the characteristics of previous learning programmes. This included an honest appraisal of experience as can be seen from the feedback to follow, some of the conference organisation and content was poor, some of our enterprise visits were outstanding. This report will be circulated to the Social Enterprise Alliance and our enterprise hosts to give an accurate report of our experience.

All of the social enterprise visits in the USA and Canada generated discussion and raised many issues for analysis. Some of the enterprises were truly outstanding global leaders, others were excellent in their ability to give our group an insight into different operating environments. In particular the absence of public funding or social enterprise policy at state or national levels caused our group to reflect on our own circumstances past and future. A number of enterprises managed to generate discomfort amongst participants, the working environment at United We Can in Downtown East Side Vancouver and the cult like qualities of Delancey Street both generated significant discussion and reflection. One persons outstanding solution to an intractable problem is outside of the comfort zone for others. In many ways these challenging situations are the most valuable for a study visit group, we contrast with our own experiences, test our boundaries, appreciate what we have ourselves but understand off the wall approaches have their place.

The following content is a brief snapshot of the observation and feedback of study group participants. Of most significance are the participant actions and these will be revisited in September 2010 to check progress and determine future collaboration and actions. This group is committed to implementing learning and using the experiences to create value and change. We look forward to a wide range of outcomes in the coming months and years.

# Social Enterprise World Forum Overview



The Social Enterprise Alliance operates an annual Summit each spring with 400-600 participants from social enterprises and “non-profit organisations”, mainly from North America. The intention in 2010 was to integrate the SEA Summit with the Third Social Enterprise World Forum, following two very successful gatherings in Edinburgh in 2008 and Melbourne in 2009.

The following is the programme for this joint event, organised by the Social Enterprise Alliance. The comments that follow are quite critical as the event didn’t reach the standards of previous Social Enterprise World Forum Events, but it is significant to realise that the Social Enterprise Alliance was in transition with an interim CEO following the resignation of the CEO who commenced the event planning and preparation process. The 2009 Social Enterprise World Forum was held in October in Melbourne, leaving a short 6 month gap to the April event in the USA. Neither situation assisted the first attempt to integrate SEWF into a recurring national event, the SEWF steering group will analyse this experience to determine its future events strategy and arrangement.

Wednesday, April 28	
	<i>registration open 8:00am - 8:00pm</i>
9:00 am - 4:00 pm	<b>Tour bundles</b>
1:00 pm -4:00 pm	<b>Pre-Conference Workshops</b>
5:00 pm -7:00 pm	<b>Social Enterprise Showcase &amp; Reception</b>
7:00 pm –	<b>Party for Students and Young Leaders of Social Enterprise</b>
7:00 pm –	<b>Dine-arounds</b>



Thursday, April 29					
	registration open 7:30am - 7:30pm / exhibits open 8:00am to 4:30pm				
8:30 am - 9:30 am	<b>Opening plenary - Catalyzing the Field (how does the public sector support social enterprise in the United Kingdom, Australia, Canada and the United States?)</b>				
9:30 am -10:00 am	Transition time				
10:00 am – 11:00 am	<b>Breakout Sessions I</b>				
	Investment & Finance	Models & Strategies	Policy & Advocacy	Leadership Development & Education	Communications and Storytelling
	What's happening Globally?				
	What are the opportunities Nationally?				
	How do I do this Locally?				
11:00 am-11:30 am	Transition time				
11:30 am -12:30 am	<b>Breakout Sessions II</b>				
	Investment & Finance	Models & Strategies	Policy & Advocacy	Leadership Development & Education	Communications and Storytelling
	What's happening Globally?				
	What are the opportunities Nationally?				
	How do I do this Locally?				
12:30 pm – 2:00 pm	<b>Buffet lunch/World Café</b>				
2:00 pm -3:00 pm	<b>Plenary panel - Engaging all Sectors (can systems thinking help us gain traction?)</b>				
3:00 pm-3:30 pm	Transition time				
3:30 pm – 4:30 pm	<b>Breakout Sessions III</b>				
	Investment & Finance	Models & Strategies	Policy & Advocacy	Leadership Development & Education	Communications and Storytelling
	What's happening Globally?				
	What are the opportunities Nationally?				
	How do I do this Locally?				
4:30 pm -5:30pm	<b>Chapter/Affinity group meetings</b>				
5:30 am -6:30 am	Break				
6:30 pm – 7:30 pm	<b>Banquet dinner &amp; Leadership Awards</b>				
7:30 pm -8:30 pm	<b>Plenary panel - Shaping a New Economy (what are we aiming for?)</b>				

Friday, April 30					
	registration open 8:00am - 4:00pm / exhibits open 8:00am to 5:00pm				
8:30 am -9:00 am	<b>Continental breakfast/Membership meeting/networking</b>				
9:00 am – 10:00 am	<b>Breakout Sessions IV</b>				
	Investment & Finance	Models & Strategies	Policy & Advocacy	Leadership Development & Education	Communications and Storytelling
	What's happening Globally?				
	What are the opportunities Nationally?				
	How do I do this Locally?				
10:00 am -10:30 am	Transition time				
10:30 am – 11:30 pm	<b>Breakout Sessions V</b>				
	Investment & Finance	Models & Strategies	Policy & Advocacy	Leadership Development & Education	Communications and Storytelling
	What's happening Globally?				
	What are the opportunities Nationally?				
	How do I do this Locally?				
11:30 am-1:00 pm	<b>Buffet lunch/World Café</b>				
1:00 pm - 1:45 pm	<b>Keynote Speaker: Dan Pallota ("Thinking Different - How does the way we've been taught to think about charity and social change stand in the way of the causes we love?")</b>				
1:45 pm -2:45 pm	<b>Plenary panel - Thinking Bigger (what does "scaling" really mean?)</b>				
2:45 pm -3:00 pm	<b>"Passing the Baton" to the South African hosts of the 4th Social Enterprise World Forum in 2011</b>				

# Conference Feedback

- This attempt at a joint event has damaged the Social Enterprise World Forum brand
- SEWF must return to dedicated events
- It was evidently a Social Enterprise Alliance event – you wouldn't have known it was the Social Enterprise World Forum from profile, content or organisation
- The conference was very hit and miss. There were some good speakers and some good workshops but the focus was too American overall
- There is a need to adopt the approach from the first World Forum in Edinburgh for future World Forums to ensure there is a truly international approach to the conference including content and speakers
- There is an issue in America with social enterprise versus non profits. This was a social enterprise event but much content was geared towards non-profits
- A large number of the speakers and workshops were of poor quality, possibly badly briefed, in some cases badly organised. Quality control needs to be improved
- There were some excellent keynote speakers including Chip and Dan, these gave a different slant and were entertaining
- Some of the workshops were good quality and informative but selecting the good ones was like a dark art or a lottery
- The theme of social enterprise got lost at times, if content from business, charity or politics is to feature, there needs to be a link back to the theme
- The formal panel session after a lovely relaxed dinner was a disaster
- There were good networking opportunities and some useful contacts made
- An interesting approach is to "Find the bright spots", must read that book
- My learning - "TBU – True But Useless" - let's concentrate on the important stuff
- Trade not aid should continue as an SEWF theme to next years event
- The conference was too big. The number of workshops was unmanageable creating no quality control
- The organised study visit number 2 was shocking - there was poor organisation and little to see, SEA have refused refunds and ruined goodwill
- The event needed stronger leadership to ensure quality control, the organising committee was possibly too concerned with the CEO interviews to attend to event detail.
- To have missed the opportunity for high quality discussion is a shame, too many poor sessions meant a poor evaluation
- This was an expensive event, costly venue, prohibitive in many ways. The SEWF in South Africa is in a University (cheaper) and needs a budget option
- Interesting choice for Chicago - back to a North American event balancing social enterprise and non - profit issues or build on the introduction of challenging international content to get deeply into social enterprise? It might be more sustainable in the long term to focus exclusively on social enterprise issues
- The conference experience was good at times, with such a sizeable group of social enterprise leaders and practitioners it did make an impact. The event demonstrated our similarities as well as some differences in our operating environments, policies and how we expect to be challenged, informed and motivated from our social enterprise events. Our lasting impression is that the excellence we experienced on enterprise visits wasn't reflected in the conference content, therefore a missed opportunity

# San Francisco Enterprise Visits

## Delancey Street Foundation [www.delanceystreetfoundation.org](http://www.delanceystreetfoundation.org)

Considered the country's leading residential self-help organization for substance abusers, ex-convicts, homeless and others who have hit bottom. Our average resident has been a hard-core drug addict for sixteen years, abusing alcohol and multiple drugs and has dropped out of school at the 7th grade and has been institutionalized several times. Many have been gang members; most have been trapped in poverty for several generations. Rather than hire experts to help the people with problems, we decided to run Delancey Street with no staff and no funding. Like a large family, our residents must learn to develop their strengths and help each other. It's an approach to changing lives that is "against all odds".

We struggle a lot but we've been doing it. For over 35 years we've been developing a model of social entrepreneurship, of education, of rehabilitation and change that is exciting and full of hope. If you need help, or want to help, please contact us. Most of all, we hope you can feel as inspired by ordinary people's abilities to achieve extraordinary accomplishments as we've been.

- This seemed to have a feel of a cult to it where everyone belongs and believes in Mimi, the leader
- This model, where there is an alternative to prison, run only by those who have been in the programme won't work in the UK or in other sectors so is non transferrable
- I found this to be a very positive set up – drawing parallels to being in the military while living there in the programme
- Mimi brought people with her – outstanding
- How did they get legal system to accept this as an alternative form of custody?
- There is a real quality here - the fact they can engage with the local community and their neighbours, considering how the enterprise functions, is inspirational
- Peer support has been taken to a new level
- It was interesting to see that the most vulnerable were housed in the poorest accommodation, rewards are earned
- The achievement here is huge – progression through accountability, responsibility and mentoring
- I found it quite concerning that the way to gain status there is to stay on and move through the ranks
- Didn't keep records – liberating – concerning - should apply some of this at home
- Investment kick started regeneration of area
- AA without spirituality – nothing cultish
- It would have been interesting to meet current early stage participants and learn how they really feel about the programme and if they believe in it in the same way as the leaders do
- An outstanding and challenging enterprise, our disquiet may have been about the lack of incentive to move on once two years are over, participants could choose this family over their real family, but on balance it produces great results and there is valuable learning in the approach and processes

# San Francisco Enterprise Visits

## Delancey Street Foundation [www.delanceystreetfoundation.org](http://www.delanceystreetfoundation.org)

- Delancey is like A.A without the spiritual content, very rigorous – works if you can cope . Transformational – inspirational
- Great visit, great hosts and good organisation but felt like a quasi- religious organisation (cult)
- Clean sense of mission, can do attitude, over reliance on charismatic leader of its time
- Most impressed by prelude to “normal life” - working and saving for flat deposit is a great idea – meaning resident will be more committed to it
- Would be interested in replicating the saving for independence idea but overall it had a bit of a “cult” feel with residents staying too long after recovery
- Emphasised need to tell your own story. Far & wide & secure, political & prominent & celebrity backing where possible
- Loved “pass it on” ethos and “each one teach one”
- I liked the holistic approach, person centred attitude but not at all the top heavy structures.
- There is a take back concept of progression via accountability, responsibility and mentoring others
- Uncomfortable about the apparent level of control over the residents lives
- Very good succession planning
- Institutionalisation – Delancey careerists
- Refusal to accept and be compromised by government funding



# San Francisco Enterprise Visits

## Juma Ventures [www.jumaventures.org](http://www.jumaventures.org)

Juma operates social enterprises in order to provide young people with meaningful employment experiences that prepare them for success in college and adulthood and that allow them to accumulate assets to invest in their education.

Youth engage in job skills training and part-time employment at Juma's social enterprise concessions businesses at major sports venues. This employment allows youth to develop important workforce readiness skills and personal responsibility. For many youth, Juma offers the very first employment experience of their lives. On average, employed Juma youth earn \$1,500 annually.

- Great way to engage on youth issues
- Marketing was fabulous
- Do they need a more long term strategy?
- Group allowed to contribute to problem solving, good engagement
- Very clear ability to promote what they have to offer – PR/ Marketing – lesson to learn
- Very powerful/ excellent grounded leadership
- People with real vision – honesty, prepared to reveal scar tissue and discuss failures
- Culture of enterprise – look at sports facilities in Scotland
- Ambitious for youngsters – social mobility/ financial success
- Sports business is hard – scale required, would it work elsewhere?
- Community benefits in our procurement might work in favour of a Scottish venture
- Mark was our social enterprise “Rock Star”
- It is evident that Juma has no power in relationship with concessioners
- There is a clear measurement antenna of new opportunities
- No security of contract with concessionary - high risk businesses
- There are marketing opportunities to individuals through loyalty schemes
- Explore other markets to counter seasonality eg basketball
- What if Juma had a female management team?
- This is hard work for the youngsters, physically demanding but offers a route out of financial exclusion



# San Francisco Enterprise Visits

## Juma Ventures [www.jumaventures.org](http://www.jumaventures.org)

- I don't know why Juma is involved in baseball - there must be easier and more effective ways of providing jobs for young people
- I want to reflect on how we present and package our young people's work into a work programme
- There was very grounded leadership
- Ground breaking approach, real vision & culture of enterprise
- This demonstrated the importance of scale and business planning
- Can there be a sustainable business model given low margins?
- Simple and effective - could work in UK
- Good model: work, savings, aspirations, educational, achievement, gives them a future
- WOW!!, focus, leadership, high standards
- Fantastic because of the high ambitions of the project and enterprise that really gives youngsters an opportunity for social mobility
- Emphasised need to me to be clear on financial performance of social enterprise when contained within other funding streams
- Encouraging bank accounts and savings for trainers
- Excellent succession planning (as far as I could tell)
- Fab way to engage with youth issues (of giving responsibility whilst keeping youth engaged)
- Great idea that is struggling with scaling up. I think they always will until they approach from another angle – i.e. think really big!!
- Really liked it was an entry level job – job not an end in itself
- In Scotland we should look at model in non-sports environment – easier businesses/ same model
- Corporate sponsorship – is there need for change in tax incentive in UK
- What is baseball all about????



# Vancouver

## Enterprise Visits

### **Xá:ytem Longhouse Interpretive Centre** [www.xaytem.ca](http://www.xaytem.ca)

Xa:ytem offers a unique opportunity to learn about Sto:lo spirituality, archaeology and history at a place where our culture has flourished for thousands of years. Xá:ytem is a non-profit charitable organization that offers a charitable tax receipts to donors, funders, individuals and organizations for their support to keep us operating and growing.

One of the things that makes XÁ:YTEM unique is the blending of science with Native oral tradition. At XÁ:YTEM students are afforded an opportunity not only to see archaeology in action but also to explore the science of archaeology for themselves. Archaeological evidence from XÁ:YTEM is physical testimony of long term Stó:lo presence, cultural traditions and spirituality. It also demonstrates that ancestors of the Stó:lo were a socially developed sedentary society of people who fished for salmon, systematically harvested the forests, traded over great distances and practiced a life rich in ceremony.

#### **Observations**

**A wonderful insight into first nation culture and issues. Many parallels with Scotland and great to see such a positive, can - do approach to blending cultural education with a sustainable business that creates much needed employment.**

### **Vancity** [www.vancity.com](http://www.vancity.com)

Vancity is Canada's largest credit union. Founded in 1946 to provide financial services to people from all walks of life, today we have \$14.5 billion in assets, more than 410,000 members, and 57 branches throughout Metro Vancouver, the Fraser Valley, Greater Victoria and Squamish.

As Vancity enters its sixth decade — having already established itself as a remarkably successful business — it finds itself in an interesting and surprisingly joyful position. Vancity is within a category of its own creation — as one of a kind, as a unique entity that is beyond a bank, and beyond a credit union. We see ourselves as having one hand in the soil and one hand on the stars. We're rooted and reaching. It's a concept that unites our history (rooted) with our future (reaching) into a succinct statement of who we are: both secure, grounded and networked as well as aspirational, visionary and thriving.

#### **Observations**

**A great discussion at the reception on Sunday and what an insight into credit unions in Canada. This was inspirational and left our group considering how to replicate this in Scotland - could an existing credit union become a significant player in Third Sector business banking? Our group will meet on September 1st to take the first steps to exploring the potential of this business concept.**

### **Enterprising Non-Profits** [www.enterprisingnonprofits.ca](http://www.enterprisingnonprofits.ca)

Enp provides grants and resources to non-profit organizations for technical assistance along the entire business development path. Enp also contributes to public policy initiatives and dialogue that will enhance and strengthen the social enterprise sector and opportunities.

# Vancouver

## Enterprise Visits

Enp provides leadership and support that will enhance the market opportunities and the purchasing of social enterprise goods and services. Enp participates in efforts to strengthen the capital investment infrastructure and expand accessibility of appropriate capital resources for social enterprises.

### Observations

**Enp and Vancity were fabulous hosts. The Enp work to support peripheral, rural communities is clearly good quality and gave us a sense of the scale and challenge of British Columbia. Enp is a gem of a resource and deserves support in their efforts to assist social enterprises to develop and grow in BC and Canada. Their “demonstrating value” approach to impact measurement is an interesting perspective in which SROI is one tool in the box, not the entire toolbox.**

### **HAVE** [www.have-cafe.ca](http://www.have-cafe.ca)

H.A.V.E. Café is a social enterprise on the downtown eastside that is dedicated to developing job and life skills in its students. Students are selected based on need and put through an 8-week culinary training curriculum. For practical experience, students prepare the meals served to the customer H.A.V.E. Café. Proceeds from the café are reinvested into the program. The rent collected from H.A.V.E. also goes to keep the transition house, located upstairs, operational.

### Observations

**A great enterprise operating in an absence of Government engagement. If our own policy environment changes we will adjust (painfully), then survive and thrive.**

### **Eco-Trust** [www.ecotrust.ca](http://www.ecotrust.ca)

Ecotrust Canada is an enterprising nonprofit whose purpose is to build the conservation economy in coastal BC. We work at the intersection of conservation and community economic development promoting innovation and providing services for communities, First Nations and enterprises to green and grow their local economies.

### Observations

**A great cultural snapshot and at its heart is the issue of land ownership and leverage. Why are native owners of land in Canada, Australia and Scotland disadvantaged and where can we learn from best practice around native title and its potential to empower and transform communities?**

### **Atira** [www.atira.bc.ca](http://www.atira.bc.ca)

Atira Women’s Resource Society is a not-for-profit organization committed to the work of ending violence against women through providing direct service, as well as working to increase awareness of and education around the scope and impact on our communities of men’s violence against women and children.

Atira provides housing, advocacy and support to any woman who lives full time and identifies as a woman and meets our organizations mandate. We strive to make our services more accessible

# Vancouver

## Enterprise Visits

to Transgendered, Queer, Two-Spirit, and Intersexed women in need of our services through education and information. Atira recognizes the barriers and stigmatization faced by women who do not fit into society's gender binary system and the violence, poverty and discrimination they encounter as a result.

### Observations

**A great example of a positive attitude to risk that has enabled this business to go to scale and reach for more people. A great non-judgemental approach, although this was quite challenging to conceptualise in a Scottish context.**

### Starworks [www.starworks.ca](http://www.starworks.ca)

Starworks is a social enterprise that has been set up by the Developmental Disabilities Association. Starworks Packaging and Assembly was established to provide employment to individuals with a developmental disability who satisfy our employment criteria. Our mandate is to provide individuals with financial gain, an accessible work environment and skills suited to careers within other companies. Starworks receives no government funding and is striving to become a sustainable business, with any profits redirected back into the business to employ more workers.

### Observations

**This polarised opinion - a high quality environment that supported people with learning disabilities. Many such enterprises in the UK would have an aspiration of moving people on to "open employment", Starworks was content to keep employees. For many of our group "open" isn't often a progression for these individuals. This is high quality and can be an end in itself. In reality one would have to spend some time in and around this business to understand its culture before bringing the discussion to the next level.**

### Potluck [www.potluckcatering.org](http://www.potluckcatering.org)

Potluck is a leader in social enterprise and an inspiring entrepreneurial model for Downtown Eastside community economic development and revitalization. Through its business activities, Potluck has directly improved the quality of life for residents of our DTES community.

Potluck operates a fully professional Café and Catering enterprise in the heart of the city serving hundreds of corporate and non profit clients. Potluck is a registered charity whose café and catering revenue is directly invested back into its 4 community social programs that are integrated into its daily operations.

### Observations

**Heather was inspirational - an incredible volume of meals from a small kitchen, going back to the supply chain to educate suppliers and adding value. Great food, great engagement - aren't there any mediocre social enterprises in Canada, or does the absence of subsidy mean that you have to do it well to stay in business? This business was enabling, positive, productive and a pleasure to visit.**

# Vancouver Enterprise Visits

## United We Can [www.unitedwecan.ca](http://www.unitedwecan.ca)

Green (sustainable) economic development is a path out of poverty. United We Can has been a pioneer in what is now being called the “Third Green Wave,” a combination of environmentalism and social equity. For fifteen years United We Can has been an advocate for marginalized people and the environment. United We Can provides people with support, training, and “green collar jobs.” These jobs help lift people out of debilitating poverty and help create community opportunities in a place commonly referred to as “Canada’s poorest postal code.”

Through its social enterprises United We Can has created hundreds of employment opportunities for the less fortunate and disadvantaged. United We Can offers recycling services to local businesses using non-motorized foot and bicycle carts known as Urban Binning Units (UBU). Employees from United We Can use the UBU cart to collect returnable containers from local businesses, apartment complexes and special events then return them to United We Can to be recycled. This is how we create hundreds of recycling jobs. (United We Can also offers commercial collection service by truck for large volume customers).

### Observations

**Did we save the best till last? This was very challenging for many, interesting concepts like producers paying a tariff for recyclables in Scotland. Is this a glimpse of our future if welfare safety nets are withdrawn leaving people with no option but to scavenge and survive at subsistence level? This business isn't solving the problems of the Lower East Side - that is the challenge of Vancouver's political leaders. The business isn't a model we would want to replicate in Scotland in its current form, however as an effective response to local poverty, with positive environmental benefits, this is well managed, professionally run and producing strong social benefits each day that it operates.**



# Individual Actions

Nigel

- Discussion with Gerry re: outcome tool – Capital assets “ The Good Bank”
- Projects connecting locally with social enterprises, possibly partnerships - Albion Trust, Twitter
- Take time out at home to strategise, network and propose social enterprise subsidiary to my board
- Idea for a business called “Velocity”
- Crowd sourcing
- Actions
  - o Meeting Anne - Marie re: business support
  - o Explore opportunities with Fiona T
  - o Talk to Kate about sub contracting
  - o Develop connections with Highlands (James & Fiona)
  - o Lynn and I do a joint visit to our shared project
  - o Links with Anne re: food work

Marian

- Consortium working now have better knowledge of whole range of organisation/ SE and will use that in future when looking for service provider/partners
- Visit each other
- Better integration with for profit businesses
- Big ticket for me is - Credit union development opportunities – how to collectively harness our financial reserves/ balance sheets
- Incubation centre property development opportunities to partners with housing associations under wider action
- Actions –opportunities to work with :
  - o Cube/ Link
  - o James in terms of starter units
  - o Ailsa – some staff are doing rural area cultural mapping

Ben

- Relationships
  - o Alisa – Pants
  - o Anne - Urban Gardening
  - o Donald – Local relationships
  - o Fiona Robb – Cultural Mapping
  - o Jim – Mind Mapping
  - o Mark - New Ideas
  - o Gerry – Knowledge Bank
  - o Shavani – New Business
- Quotes
  - o Find the bright spots
  - o Change the environment, not the people
  - o TBU – True But Useless
  - o Disruption is key to innovation
  - o Give everyone the £500k donor experience
- Actions
  - o Visit to Oz Sept 10
  - o Follow up with potential partners
  - o Flickr – share photos

# Individual Actions

- o Linked/n – Keep connected
- Resources
  - o Crowd sourcing leveraging time
  - o Blended return on investment model
- To take Home
  - o Mentoring
  - o Peer development
  - o Utilising your audience during a presentation
  - o One page annual report
  - o Right to request
- Business Ideas
  - o Pants!!
  - o Mind mapping
  - o “The Big One”
  - o Cultural Mappings
  - o Social enterprise stock exchange assets value release
  - o Co-op capturing larger business

Donald•

Taking back - each one teach one

- Social networking
- Inspired by the scale of the organisation on visits
- Not being scared of loan
- Action
  - o CEiS knowledge
  - o Gave me the confidence that what we are doing is right
  - o One page annual report
  - o Tie up with Anne - Food Scotland
  - o Follow up with Mark
  - o Follow up with Ben
  - o Lend best practice to Ben, Mark, Luca, CEiS
  - o Opened up conversation Firstport

James

- Use social networking to promote work
- How can we empower you to fulfil your promise to the world?
- Engage Firstport to develop new social enterprise
- Improve data collection system and process of data analysis to enable quick response and evidence of success
- Share with other social enterprises
- Create a 360 degree culture
- Actions
  - o Meet Ailsa and share knowledge
  - o Visit landmark education
  - o Visit Marian to see starter units
  - o Visit Kibble and Wise Group
  - o Share knowledge 2 way with Mark
  - o Meet Bill
  - o Engage with CEiS re: system development

# Individual Actions

- Mark
- Actions
    - o James – Ongoing relationship – potential mentor for me in social enterprise sector. Also investigate replicating new start highland in new local authority areas
    - o Donald – E + T Team visit to implement similar standards
    - o Kate – Tender shadowing, criminal justice partnership
    - o Maureen & Marian – Meet to discuss plans and funding for new social enterprise in N.L. with head of operations
    - o Anne – Meeting to discuss Cornerstone home shopping partnership pilot with Asda
    - o Fiona R – Understand HIE
    - o Fiona T – Feasibility study, private home care service, home help, maintenance services
    - o Nigel – CCPS, Mentor, Integrity/ true to mission, growth
- Luca
- Interact/ meet with some of the members of the group - explore synergies and business opportunities
  - Report to Firstport and Cyrenians
  - Set up a blog or any other way to keep this network going
  - Set up regular meeting (every quarter) with a topic to discuss
- Maureen
- Further discussion to develop joint working projects with:
    - o CUBE/ Lynn
    - o Link/ Helen
    - o Cornerstone/ Mark
    - o Firstport/ Naomi
    - o The Wise Group/ Kate
    - o Remploy/ Ben
    - o LES/ Marian
  - Actions
    - o Pursue funding opportunities with Firstport and Anne
    - o Look at producing a guide: Delivering community benefits in North Lanarkshire, ensuring links to local social enterprises
    - o Hold internal procurement meetings with NLC to identify emerging opportunities from service rationalisation exercise
    - o Hold a meeting with key North Lanarkshire social enterprises plus new interface to raise our game
    - o Think and understand more about the blended values approach
- Bill
- Strategic planning ideas for board away day
  - Know your social enterprise activity in minute detail
  - Design your product to produce volume ambassadors
  - Must get my healthy living award
  - Must visit James @ New Start Highland – Inverness – completely out of the box thinking – care – combine harvester

# Individual Actions

Ailsa

- Resources already developed for social enterprise work in schools
- PANTS & CO - to be explored
- People and Place mapping
- Wild food walk and quality food experience
- Holistic support experience
- Effective marketing
- I want a mentor and have a few to stalk
- Photo exhibition with focus on bright sparks
- Car co-op
- Property development and management maximising social benefits



# Conclusions

This group was energetic, engaging and determined to learn and interact with hosts and each other. The enterprises visited provided us with the opportunity to reflect on the strengths and weaknesses of our own operating environment as well as get an informed snapshot of innovative, challenging enterprises in difficult cultures.

It was interesting that people viewed enterprises in different ways, some participants were inspired where others were challenged to the point of discomfort. Our critical analysis in private was robust and interesting, our feedback to hosts direct, yet sensitive. Some hosts will have gained ideas from our discussions, all seemed to appreciate our presence and contribution.

The World Forum content and organisation was poor by their own standards and we need to revise our approach to attendance at future forums. The organisers need to integrate local and international and maintain a high standard of organisation throughout. The international dimension was at best, misunderstood, on this occasion, some might say, disregarded.

One of the key features of every study visit group is the benefit of extensive time in the company of social enterprise leaders and supporters. This visit programme worked exceptionally well in this regard and the actions that participants have identified with each other and to be taken forward individually will continue to produce long term outcomes for social enterprise in Scotland in the months and years to come.

