Pathways to Prosperity

- for the Third Sector and Aberdeen City

Executive Summary

This report investigates the value and needs of Aberdeen City's Third Sector with a focus on its business development requirement in order to grow the Sector in the City. The report begins by defining the Third Sector as new term referring to organisations that provide social or environmental benefit and which do not distribute profits.

The research begins by exploring the impact that the Sector has on the economy and the efforts already made in other areas to grow the sector and the challenges that have already been encountered or are perceived to be encountered. This research confirmed the need for this study to be undertaken and guided the method for data collection.

The sample chosen for this research were local Third Sector Organisations providing a range of services to the area. In order to provide the relevant information in the time scale given a qualitative survey was decided upon.

The study successfully reveals the development needs of the Sector and provides the Aberdeen Third Sector Working Group with relevant recommendations for future action. These recommendations centre around aspiring to do well and therefore having good business planning, forming partnerships, self auditing and being self sufficient. The report advises that having these foundations in place may lead to increased capability to bid, be more successful and be seen to be a thriving business.

The Author

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1.0 Introduction

1.1 Background to the study

The object of this survey is to report on the value and needs of the city's third sector in order to grow and develop the sector in the city. The main focus for the research looks at the business development needs of the sector and how to make the sector more competitive when bidding for public sector contracts against the private sector.

The reason for this study is due to the increasing recognition that the Third Sector is getting as a key part of the Scottish Economy. It has been recognised, however, that potential opportunities for the Third Sector to compete with the private sector, in terms of bidding for contracts, is not always taken. There is an understanding that there is a need to consider what actions need to be taken to assist the local Third Sector to take up opportunities, but it is unclear what the current value of the Third Sector is to the economy and what the development needs are for the Third Sector. This report aims to identify this.

2.0 Literature Review

2.1 What is the Third Sector?

"The 'Third Sector' is a relatively new term for organisations that provide social or environmental benefit and which do not distribute profits. The term covers voluntary and community organisations, volunteering bodies, charities, social enterprises as well as some co-operatives and mutuals. 'Third Sector' is sometimes used interchangeably with the term 'voluntary sector." (Scottish Government, 2009)

Price Waterhouse Coopers' survey in February 2009 revealed that the third sector employs 650,000 people and contributes nearly £9bn a year to the UK economy with social enterprise alone. "There are 45,000 voluntary organisations in Scotland involving around 130,000 paid staff and approximately 1.3 million volunteers. The sector manages an income of £4.1 billion." (SCVO, 2009)

"The Third Sector makes a direct impact on the growth of Scotland's economy, the wellbeing of its citizens and the improvement of its public services." (Scottish Government, 2008) The Scottish government aims to create a more successful country with opportunities for all to prosper, through achieving sustainable economic growth, and they believe the Third Sector holds an important role in helping to achieve this.

The Aberdeen City Council's Economic Development Unit is committed to achieving the following aims as part of regenerating the local economy:

- Raise awareness of the social economy and its contribution to economic activity and social inclusion.
- Facilitate networks of social enterprises and dissemination of information to foster greater partnership working within the sector and with stakeholders in the public, private and voluntary sectors.
- Support the growth and development of social enterprises through greater access to finance and increasing market opportunities.
- Develop a more co-ordinated and effective support system for social enterprises.

2.2 Contracts and Procurement

At the moment there are already some third sector organisations providing public services but the government now wants to see more. At present the UK government is committed "to extending the role of the voluntary sector and community sector (VCs) in the delivery of public sector contracts." The government believes that there are many advantages the third sector can provide, such as:

- Established links with the community
- Good understanding of the needs of specific client groups with a greater capacity to reach and earn the trust of excluded or disadvantaged groups
- Driven by charitable aims rather than profit which allows them to be flexible, responsive and committed to customer needs
- Experience to innovate

Government Procurement Policy currently aims for bidding to be as fair as possible and presently requires that "all procurement must be based on value for money (VFM) – that is the optimum combination of whole life costs and quality to meet user's requirement." (House of Commons, 2008) In Scotland it is policy that contracts are awarded on the basis of MEAT - Most Economically Advantageous Tender, this is where not only price but also the quality of the tenders is to be considered.

At present notices about contracts for Aberdeen City and Shire are posted on a Central Procurement Unit on the Procurement Partnership website. http://tenders.aberdeencity.gov.uk/search/search_mainpage.aspx The councils are however in the process of transferring these onto the National Contracts Scotland portal. At present organisations are asked to check both sites, until the transfer process is finished. Organisations need to register as a supplier and download tender documents from these websites to allow them to be considered for these contracts.

For some smaller organisations tendering for a contract is not always viable and therefore many of the highest value government contracts will go to large organisations, however there is sometimes the opportunity for these smaller organisations to get engaged by subcontracting (partnering/consortia) with these larger organisations.

2.3 Current Action

2.3.1 Enterprising Third Sector Action Plan, 2008-2011

In June 2008 the Scottish Government launched the Enterprising Third Sector Action Plan, 2008-2011, this hopes to provide an environment in which the Third Sector can thrive "enabling the third sector to play a full role in the development, design and delivery of policy services in Scotland." (Scottish Government, 2008) Through the plan the Scottish government have committed to providing £93m of funding up until 2011. Over the period in place are 7 objects:

1. Opening markets to an enterprising third sector
2. Investing more intelligently
3. Promoting social entrepreneurship
4. Investing in skills, learning and leadership across the third sector
5. Providing support for business growth
6. Raising the profile for enterprise in the third sector
7. Developing the evidence base

The first objective directly relates to the objective of this survey and in order to achieve this objective the action plan has put in place a series of actions. These include:

- Helping the third sector develop skills needed to access markets effectively, whilst ensuring the public sector allows them opportunities to bid for contracts
- Develop a network so that benefits of working with the sector are recognised
- Ensure the third sector is given the opportunity to bid for contracts which they are particularly well equipped for such as helping individuals address and overcome challenges
- Improve the third sector's ability to identify markets and opportunities and clearly demonstrate where they can and already do make a difference.
- Provide training on writing tenders

An enterprising third sector will be more than just trading however, it will be about using “knowledge to look for and implement innovative solutions to social and environmental problems, either through delivering a service directly, or in partnerships with organisations.” The idea is that a service which can produce social benefits, such as improved health, opportunities for young people, rehabilitation for offenders or training for employment, will in turn contribute to the overall economy.

£30m of the £93m has been allocated to the **Scottish Investment Fund.** This aims “to build capacity, capability and financial sustainability in the third sector, ensuring a strong and active third sector reaches its potential and makes a key contribution to the national outcomes of the Scottish Government” (SIF,2008)

What has SIF done so far?

Momentum Scotland – four subsidiaries provide employment and training to over 2,000 people – their main target being people who suffer from mental health difficulties and head injuries, which limit their ability to work in mainstream employment: funding of £1.2m met the cost of purchasing a headquarters for the entire Scottish operation. This provided the organisation with a stable asset base within its balance sheet to support future growth and also makes the company more attractive when tendering for contractual work with bodies such as the Department of Work and Pensions. The social return on investment; taking account of the added value of having one HQ, the effect the purchase has on increasing balance sheet strength and the social value of the work, is estimated in excess of £4.3m.

2.3.2 Partnering

According to Third Sector Online, “Forming a partnership with another not-for-profit organisation working for a similar cause can be an effective way to raise vital money because many funders are starting to take a more strategic and streamlined approach to grant giving.”

In PWC’s survey (2009) “Can collaboration between social and private enterprise deliver?” revealed that two thirds, (66%) of all respondents believed that partnering will be important to the growth of the third sector and that it can bring benefits for public service delivery. To enable social enterprises to compete more effectively they found there was strong support to help grow the third sector, through policy interventions; in particular these included commissioning, the government placing greater emphasis on third sector contribution to society, supporting the third sector in attracting the best possible people and increasing the availability of Investment finance for social enterprises. They also found that there is a strong belief that social partnerships could lead to “innovation, customer focus and value for money” in the delivery of public services. When asked about the effects of the recession 70% were in agreement that the third sector would become more attractive in public service delivery and that working with the sector could become more attractive to the private sector companies.

In a separate survey by PWC (2009) they also noted that despite the economic downturn, there could be great opportunities for social enterprise in particular to expand into new markets. They believe, however, that partnering will be important in taking advantage of this, “Accessing that opportunity may, however, rely upon partnerships and alliances with private providers to achieve a critical mass capacity and capability in order to address larger and more complex service requirements.”

PWC also believe that there are certain constraints on growth in the third sector possibly due to the lack of capacity and funding and perhaps culture and confidence and the way in which "commissioning and procurement systems favour larger private and public providers" and also that "voluntarism and a commitment to re-investing profits for social good are arguably not enough to claim a relatively larger slice of the cake." They state that there is a need for these organisations to prove that they can deliver their services "efficiently, effectively, are fit for purpose and offer a first rate service to private firms and public organisations." The challenges with this however, is a need to timely access the capability and capacity necessary to build a wider and deeper service offering to achieve significant expansion and also with the difficulty in accessing conventional funding. The Social Private Partnerships (SPP), aim to overcome this by, partnering social enterprises with private organisations. Social enterprises will gain access to resources (people, finance, systems) and the partnership can offer "the capability, credibility and capacity necessary to win, manage and operate more government contracts, but with a clear focus on the delivery of positive or improved social and environmental outcomes." In return the private organisations will receive a "competitive edge with access to specialist knowledge and expertise, innovation, an ability to connect to clients and users who are hard to reach and serve and evidence of commitment to community."

A recent example of Charities partnering with private company's has been The British Heart Foundation (BHF) and Lidl, "The BHF hopes the year-long partnership with the retailer, which has more than 500 stores in the UK, will raise about £100,000." (Third Sector, 2009) As well as raising funds the BHF will visit stores throughout the year in order to raise customers awareness of healthy living.

2.3.3 Change Up

Change Up is a £231m programme for improving support services for frontline third sector organisations. A recent survey by the National Audit Office, "*Building the capacity of the third sector*" (Feb, 2009) examined this programme and Future builders (discussed below) which were designed to build the capacity of the third sector. They found that Change Up was relatively significant in establishing better partnerships between local support providers, which allowed for better assessments of the needs of these frontline organisations in each area and in the gaps in support to them. Improvement in partnership working has benefited frontline organisations, although the impact is varied with a less significant improvement in areas where there were significant weaknesses in existing support or obstacles to joint working. Better support enabled some frontline organisations to:

- Improve governance arrangements
- Reduce time spent on administration
- Manage staff and volunteers more effectively
- Focus more on those aims and objectives that provide public benefit

2.3.4 Future builders

The National Audit Office (2009) found that where investment had been used to develop capacity (improvements to governance, strategy and premises) it had increased the recipient's ability to compete for contracts. Figures showed that 3 in 8 organisations had led to over £600,000 worth of contracts to deliver public services. The scheme so far has also been able to help frontline organisations establish at least 79 contracts to deliver public services in 6months (up to Sept 2008).

2.3.5 Community Shares

A recent project (announced July 2009) was launched so that five community owned enterprises were selected for a two year government funded action learning research. This was introduced to "lead the way in communities in England to create common wealth in their local areas and transform communities for good." (Social Enterprise, 2009) The funding for the programme came from the Office of Third Sector Enterprise Action Learning Fund, The Department for Communities and Local Government. The programme will be run by Development Trusts Association and Co-operatives UK in conjunction with UK SROI. The programme intends to raise finance through community investment with the sale or offer of sale of £10,000+ of shares and bonds to communities of at least twenty people to finance ventures serving a community purpose. Successful projects will receive a package of funding and consultancy. The project is thought to be a success with the view that "local people like investing in something they can see, touch and benefit from."

2.4 National Survey of Third Sector Organisations

The Office of Third Sector commissioned IPSOS Mori to conduct the survey gathering views of leaders of Third Sector Organisations in England. A detailed analytical report and key findings of the survey, was published in May 2009. The survey looked into "what elements have the largest impact on the third sector organisation's perceptions on whether local statutory bodies have a positive influence on their success." The top three answers were:

1. Ability to influence local decisions
2. Current direct dealings with local statutory bodies
3. Local statutory bodies value the work of your organisation

The seventh and ninth place were to do with satisfaction with local statutory grand funding/contract bidding arrangements and help, advice and support provided when applying for grants/bidding for contracts.

2.5 Winning Contracts for the Third Sector

Following feedback that local leaders were missing out on potential government contracts, this programme was requested by Northern Ireland Council for Voluntary Action (NICVA), an umbrella body for the community and voluntary sector in Northern Ireland. Aurion Leadership developed the programme aiming it at leaders in the community and voluntary sector. As a matter of policy the government has requested that there be more services provided outside the mainstream of the public sector. Although this creates more opportunities for the third sector it also means that organisations will be bidding in open competition for funding. Therefore the third sector will need "the capacity to demonstrate how they add value and offer competitive advantage in order to attract public funds." The programme aims to provide hands on training and individual workshops. It will provide information the tendering processes and also help develop and practice proposal writing skills. It will also cover innovation and sustainability, often missing components and look at the organisation's readiness to tender as well as contract negotiation and managing a contract.

2.6 Perceived Challenges from research

- Economic downturn: Are there mechanisms in place for the organisations within the third sector to cope with the increase in market demand – particularly within the health sector with a shift towards health improvements? There is an increased pressure on organisations income as availability of public and non-public funding/donations decrease. This sector is also not immune from the problems in the banking sector and the tightening of credit. Is it possible for these organisations to manage both rising costs and meet the increase demand? In a survey published by the Office of the Scottish Charity Regulator found that in 2009 the second most important issue facing the Charity Sector in Scotland was the economic downturn, in front this was funding.

- PWC's survey found the biggest barrier to social partnering was the lack of understanding between sectors (86%), the lack of ability amongst commissioning organisations to measure social return (85%) and the lack of access to finance to support partnership (71%). Suggested ways to break barriers were closer contact and dialogue between sectors, collaborative working, strong central government leadership and access to Investment finance.

- "One reason why problems occur is because companies and charities have different expectations over the nature of partnership relationships."

- Need to provide advice and incentives (such as tax) to drive the creation of SPPs.

- Change Up – the challenge will be in sustaining the improvements by finding new sources of income to fund the services. The survey was also not able to ascertain whether or not it had provided value for money because it was too early to tell. Future builders – Because the investments are long term it may be some time before there will be evidence showing value for money. There also needs to be something in place to manage the risk of non-repayment.

- Are organisations interested in moving themselves forward – if not how can we motivate them? Are they interested in bidding? How much will it actually benefit the particular organisation? Who manages the risks, financial and non financial?

- Retaining employees: If investment is used to give employees new and better skills to improve their performance in their job role will they stay or seek employment elsewhere?
- The consequences of competitive bidding are that large bidders, often from the private sector are unintentionally favoured. This is because the private sector often has "economies of scale and can employ members of staff or even teams just to write tenders." (The Guardian) Also some of these companies will even be prepared to bid on a loss-leader basis, so they don't expect to make or may even lose money, because they want to get a hold in a particular market.

- "Some commissioners, such as Department for Work and Pensions, rely on third parties from the private sector to choose which organisations to deal with on the delivery of public services…these private sector groups are used to dealing with large organisations and may lay down requirements for bidders that smaller organisations struggle to meet." (The Guardian)

- "Organisations can find it difficult to demonstrate to commissioners the robustness and to tick all the required boxes in areas such as quality assurance standards, governance and financial controls." (The Guardian)

- Pre-qualification and tendering procedures can be costly and complex and often have unrealistic timescales.

- There is a "lack of early and effective consultation with the VCs in the development of policy, programmes and strategies, leading to poorly packaged or unattractive procurements" (House of Commons, 2008)

- It can be difficult for organisations to find out about contract opportunities and who to approach about becoming a supplier

- Ethical: Should income be used for training and developing employees or should it be used directly to serve clients? Is there a risk of having to choose whether to suit what the government thinks it wants over staying true to the company's mission and values and what its beneficiaries need, or can both be achieved? Is there a danger of focussing on contracts and detracting from the charitable origins? "unless a charity has something extra to offer, if it engages in trawling for contracts it is moving away from its charitable origins and in the long term will gradually erode its voluntary base" (Clutterbuck and Dearlove, 1996)

3.0 Method

The scope of this project was wide and although the areas of research were defined, there were no specific research questions at this point. In order for this work to progress in a focussed manner, the first step was to undertake a literature review and speak to members of ACVO to try and 'pin down' the specific research questions. The themes that came up in this informal research centred on planning, partnering, contracts and training. This enabled the research questions to be devised.

The questionnaire was semi- structured. There was a standard list of themes and questions to be covered however, in particular interview questions may be omitted or added depending on the flow of the interview and the answers given. The themes that came up in the research centred on planning, partnering, contracts and training and therefore this was used for the structure of the questionnaire. The questionnaire contained a variation of open, probing and specific closed questions. (Copy can be seen in Appendix A)

The reason for using telephone interviews was that it was becoming obvious that the type of data that was required would be qualitative in nature, as the research wanted to understand the organisations past experiences, views and perceptions and perceived issues and challenges. It was decided that using telephone interviews would give us the best opportunity to extract the quality of data needed in a timely and cost effective manner. By using interviews it also allowed for probing and therefore led to more in depth qualitative answers and it also ensured the participant interpreted the question correctly. Added to this the questions could be adapted depending on the answers that were being given, some questions could be omitted if not relevant, and some answers may be probed further to obtain more in depth information. Also due to the time of year it was felt lots of people would be going on holiday and therefore the response rate may be quite low if a survey was to be sent out, which was the case in another survey done previously. Another factor was the length of time given to do the survey, a sent out questionnaire may have required a longer length of time in which to await a response, whereas the telephone interviews allowed the data to be collected within a couple of weeks. The reason for using telephone interviews as opposed to face to face was down to the likelihood of being able to set up a large number of interviews and the cost and time that would be involved in this.

3.1 Selection

The sampling technique used in this research was stratified random sampling. The population was divided into a number of sub sets and then a random sample was drawn from each group.

In order to be relevant to the research the organisations used were selected from a group which were

- Local to Aberdeen City – the research is intended to help ACVO and Aberdeen City Council be better placed to help third sector organisations become more competitive by helping them with their business needs – therefore it was thought that the research should be aimed at those which ACVO and ACC are able to help rather than those who are national and potentially already have support from various sources.

- In order to achieve a representative sample, the sample aimed to include companies providing a range of services from the Third Sector Fora, from the ACC approved providers list and from those who are currently involved in ACVO's business support. This gave a wide range of organisations and a mixture of those who are already succeeding, those who are aspiring and those who could be aspiring. The very small organisations which are a long way from being in a position to be bidding were not included because the target was organisations which need support at present. From this list of organisations, 12 from each of these sub categories were chosen at random, with reserves in case some contacts were not willing to take part or were away on annual leave. The final numbers consisted of 14 from the Third Sector Fora, 7 from the ACC approved providers list and 7 from ACVO's business support contacts, therefore resulting in 28 participants in total. This was mainly due to a large amount being difficult to contact within the given time frame due to people's annual leave and not because people were unwilling to take part.

3.2 Data Collection

The data was collected by telephone interviews. A courtesy email was sent out to all participants before hand to notify them that they should be expecting a telephone call in the coming two weeks, which also gave them the opportunity to specify any times which would not be convenient to be called and to decline taking part.

At the start of each call the purpose of the research was outlined as well as the themes to be covered and confirmed the amount of time available. The participant was also notified that their answers would be kept confidential and of their right to not answer any question. At the end the participant was thanked for participating in the research and was told that they would have access to the final report.

3.3 Limitations

The sample is a representation of the sector and not an audit. This was done to achieve qualitative data in order to explore and understand issues. Views are from a selection of individual representatives of organisations and therefore do not necessarily reflect the views of that organisation as a whole.

4. 0 Results

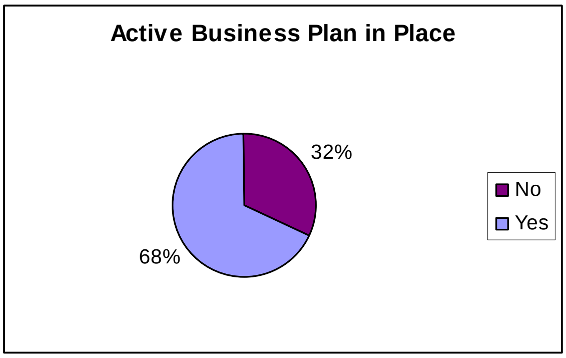
4.1 Planning

Table 1 and figure 1 below show the responses from participants when asked whether or not there was an active business plan in place (strategic plan / objectives). 68% did have an active business plan in place and 32% did not.

Table 1: *Q = Does your organisation have a business plan in place (strategy/aims/objectives/goals)?*

Yes	19
In process	5
Out of Date	1
No	2
Not sure	1

Figure 1: No includes all organisations that were either not sure, in the process of making one or it was out of date.



n= 28

Of the 19 participants who had an active business plan in place;

- 11 of them were rolled out over 3 years and one between 2-3 years
- 2 over 5 years
- 2 yearly plans
- 1 rolling / continuously reviewed
- 1 who had a 10 year strategic and a 3 year operating
- 1 who did not know

Out of the 5 participants who were in the process of forming their business plan or re-writing it, one was re-writing it for 5years, two were in the process of writing their plan for 3 years and the other two were unsure at this stage.

Out of the 19 participants who had business plans in place only 17 of these plans contained details of an income generating or fundraising strategy. The majority of these 19 participants also felt that some support would be required in order to meet their plans objects; this varied greatly between different organisations. Examples of this included:

- Fundraising / monetary support – a person to help with fundraising, actual funds either additional or to be made more secure
- Evaluation – help evaluating projects, data analysis
- People with professional skills – employment law, management, PR
- Training

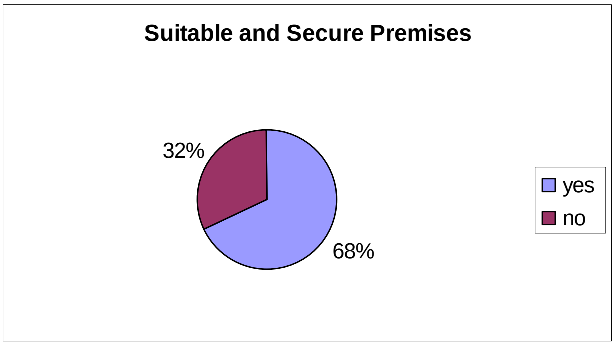
Some of these participants felt that support or extra help was not required or would only be required if they decided to expand or take on new services which might need funding or resources. The reasons for this also differed between organisations. Some felt they had good support already either from committee members or other bodies, or they felt that because they were reasonably well established or a larger organisation that it was not required.

Table 2 and figure 2 below shows the results of how many participants had an appropriate and secure premises and table 3 shows how many participant who had a business plan in place had an appropriate and secure premises.

Table 2: Appropriate and Secure Premises: *Q = Do you have an appropriate and secure premise to allow you to achieve your goals / objectives in the business plan for the next 5 years?*

Yes	19
No	9

Figure 2:



n= 28

Table 3: Number of participants who had a business plan and had an appropriate and secure premises.

Yes	14
No	5

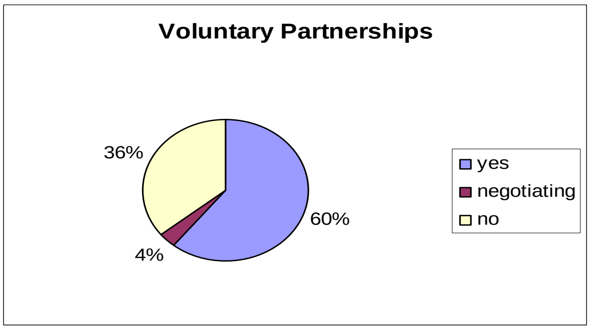
4.2 Partnerships

Table 4 shows the responses participants gave when asked if involved in voluntary partnerships. More than half the participants asked were involved in partnerships, or were negotiating one, but a large number of the participants asked were not, this is illustrated below in figure 3.

Table 4: *Q = Do you work in partnership with other voluntary organisations to deliver or promote services?*

Yes	17
Negotiating	1
No	10
In past	1
Thinking / looking	3
No and wouldn't consider	2
No but would consider	4

Figure 3:



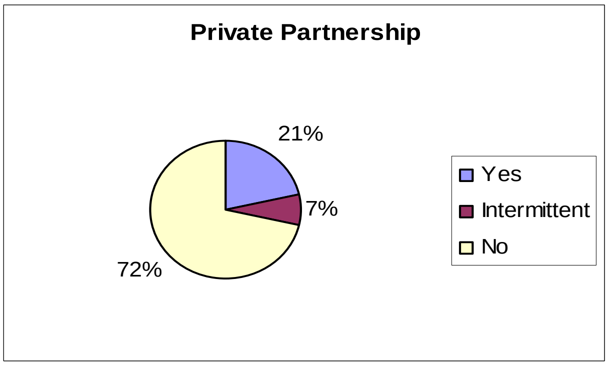
n= 28

Table 5 and Figure 4 show the responses from participants when asked if involved in private partnerships. The results show that more than half the respondents, 60% were not involved in a partnership with any other private organisation.

Table 5: Private Partnership: *Do you work in partnership with other private sector organisations to deliver or promote services?*

Yes	6
Intermittent	2
No	20

Figure 4:



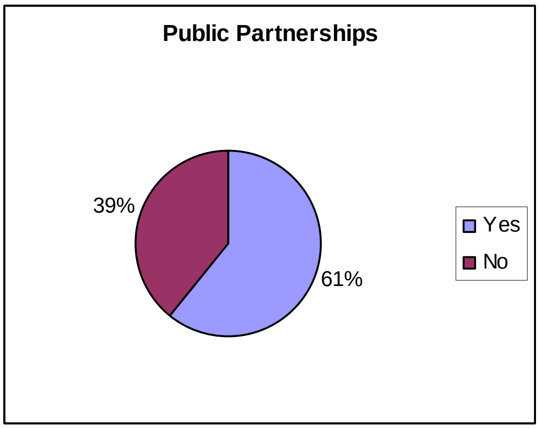
n= 28

Table 6 and Figure 5 show the response from participants when asked if involved with any public partnerships. The result for this was nearly half and half but with the majority showing that they were involved in a public partnership.

Table 6: Public Partnership: *Do you work in partnership with other public organisations to deliver or promote services?*

Yes	17
No	11

Figure 5: Public Partnership



n= 28

When looking at partnership as a whole 5 out of the 28 participants were not involved in any type of partnership.

There were various benefits identified with having a partnership. Table 7 shows the benefits that the participants who were engaged in a partnership gave, categorised into four main areas.

Table 7: Q = *How do your partnerships benefit you?*

Table 7	Benefits to Partnering			
	Knowledge / Experience	**Money**	**To client**	**Resources**
	Enhance knowledge and expertise	Funding projects are attracted to partnerships	Recognise where others have expertise so can focus on own areas of expertise but still giving the best service to clients	Share resources
	Need to learn and share	Helps reduce cost	Benefits client group	By spreading resources can do more
	Can plan events and share research	Helps reduce funding	Crucial in order to reach and contact audience to ensure delivering outcome	Can create a project which lessons management responsibility
	Share info	Can give a secure income stream on a longer term basis	Helps offer a wide range of services	Helps with volunteering
	Can develop joint strategies		Gives each other initiatives to enhance service	Can give a source of referrals for volunteers
	Gives a greater understanding of issues		Able to provide additional service	Share contacts
	Stops you being insular		More diverse	More support
	Can receive more specialised and relevant guidance		Helps the client find other services	Gain support and client references
	Help contribute more than more area of expertise		Voice of clients heard - more aware of needs	Pull more people in
	Can learn form what one another's doing			
	Widen experience			
	Gain information			
No of Participants	**12**	**4**	**9**	**9**

4.3 Contracts

9 out of the 28 participants were involved in bidding for contracts and out of these 5 had been successful at least once, 3 were still waiting to hear back from their first one and one had never been successful. Of these that were involved in bidding they were asked for their reasons for being successful or non successful.

Reasons for success:

- Demonstrated themselves as a strong business
- Had a strong track record
- Good background work
- Easy to build on service
- Met study requirements
- Access to a lot of people
- Person in charge has over 30yrs experience

Reasons for being unsuccessful:

- Geographic location
- Not the type of org they were looking for
- Someone better
- Presentation
- Too small an org
- Cost – (were not cheap enough) this was mentioned by three separate participants
- Project proposed not big enough
- Lack of money to develop
- Difficult to show the difference they've made
- Level of applications

Out of these 9, some were still waiting to hear whether or not they had been successful. Below is a list of their perceived reasons for success:

- Only service in the area providing that type of work
- Established a long time
- Staff and service meet requirements and training
- High skills and experience
- Already run contract

All participants were asked what they perceived to be the obstacles in the way of bidding this is shown below in table 8.

Table 8: *Q = What would you consider to be the obstacles in the way of your bidding for particular contracts?*

Cost	3
Capacity	9
Knowledge / Experience	4
Not an option	6
Not considered / not interested	5
Ethical	3
Other	4

Other included:

- The risk
- That it was more of a private enterprise culture

- That working with the private sector would take in more income than with the public
- Need to jump through hoops to tick boxes

Q = Do you feel you would need to compromise any of your values in order to make yourself more competitive for contracts? Do you feel you would need to compromise any of your activities in order to make yourself more competitive for contracts?

Ethical issues that were expressed by some participants with regards to whether or not they felt they would need to compromise any values or activities to make themselves more competitive to bid for contract are expressed below:

- No
- Yes - probably why haven't grown because not been prepared to unless justified. Values are core to the business that's why people work here
- Wouldn't compromise
- Don't want to go down that route - bidding generates lowest quality and cheapest service. De-motivates service and demoralises staff
- Wouldn't compromise values or core activities but may shift the other activities
- Would stick to core activities. Would think really hard would depend on the compromise and the longer term benefit for doing so.
- Wouldn’t like to think would consider but difficult to say when not in that position
- No
- Wouldn't compromised values but have had not change to involve other services
- Wouldn't compromise on values but possibly on activities to a degree as long as it wasn't at detriment to the service
- Don't think so
- Would probably have to compromise
- No

4.4 Support

Table 9 illustrates the various responses from participants on their views of what support they felt they required in order to support them with bidding for contracts or with growing their business in general. The suggestions made for support has been separated into the seven main categories that were highlighted and show the number of participants who stated that they required help in this area– Contracts (7), Money (15), Employment Law (3), Training (10), Networks (9) Evaluation (3) and Other (3).

Q = What type of support do you think you will need to support you in achieving your plans objectives? What type of support do you think would be useful to make you more competitive or support you with your business in general?

Table 9:

Area of required support	**Contracts**	**Money**	**Employment Law**	**Training**	**Networks**	**Evaluation**	**Other**
Specific support required	Events on how to write tenders	How to sell yourself to get corporate funding	Provide knowledge on employment law	Training for committees	How to get the best from support	Help and advice with evaluating the service	Office space at a reduced cost
	Advice on contracts	Marketing and fundraising	Employment law - need up to date legislation	How to go about business	People with professional skills to advise	Evaluation team	Look into partnerships
	In depth knowledge on how to write a proposal	Help finding grants	Kept right on employment law	Management help	Come into contact with people who have done a similar things - learn by example	Evaluation on value of projects from an independent	Partners for one off projects
	Help identifying contract opportunities	More of what ACVO does at present for fundraising		Management and leadership training	Open up opportunities to speak and network with people		
	Help to draw up tenders	Buy in from local authorities and other statutory bodies		Infrastructure to develop training - flexi / home study	New committee members		
	Workshops - tender	Monetary support		Better access to training	New trustees		
	Source of support for putting in proposals - to look at application with more objective eye	Advertising help		Help with data analysis	Providers to have meeting to discuss standards, ideas, what's going on		

Area of required support	**Contracts**	**Money**	**Employment Law**	**Training**	**Networks**	**Evaluation**	**Other**
		Fundraising / PR person		Help produce more detailed and accurate accounts	Meetings good but can be difficult to pick up on what you need		
		Additional fundraising committee		Workshops - media, collaborative working	More support - left to find your own way		
		Develop fundraising strategy		Courses to be in Aberdeen not central belt or Inverness			
		Widen fundraising strategy - joint events		Creating a website			
		Funding training					
		Funding strategy					
		Ensure funding proposals match policy					
		Commitment from local authority - provide expansion					
Total no of Participants	**7**	**15**	**3**	**10**	**9**	**3**	**3**

4.5 Training

Table 10 below shows the amount of money each participant claimed to spend annually on training. As many as seven participants were unaware of how much they spent in a year on training; this was either because they did not have the figures to hand or because they did not keep a record. Following this the majority of participants were either spending nothing on training or between £1,000 and £5,000. Spending nothing however, did not always mean that they were not providing any training but that they only take advantage of free training that is available to them. Table 11 illustrates this by showing that only two of the participants did not provide any training at all.

Table 10:

Amount Spent (annually)	Number of Participants
Nothing	5
Not sure	7
£100 – 1000	3
£1000 – 5000	5
£5000 – 10000	2
£10000 – 50000	4
£50000 +	2

Table 11: The different types of training that organisations provided to either paid and/or voluntary staff. (NB. Some organisations provided more than one type of training)

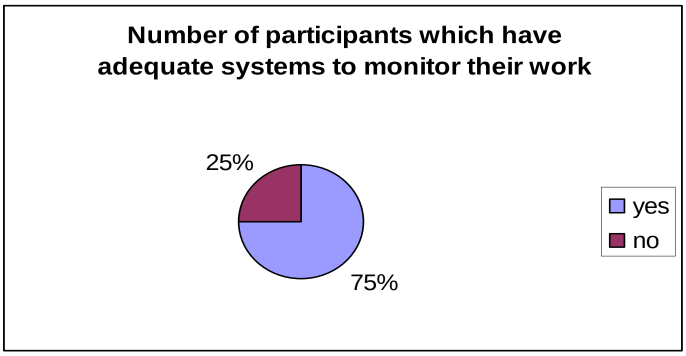
Type of Training	Number of Participants
None	2
Free (ACVO)	7
Management	9
University / SVQ / HNC	9
Specialist	17
In-house (first aid, induction etc)	22
Website	1

Table 12 and Figure 6 show the number of organisations which have adequate systems in place to allow them to monitor their work. 21 out of 28, 75% percent of participants reported that they did have adequate systems in place for monitoring their work.

Table 12:

Monitor Work	Number of Participants
Yes	21
No	7

Figure 6:



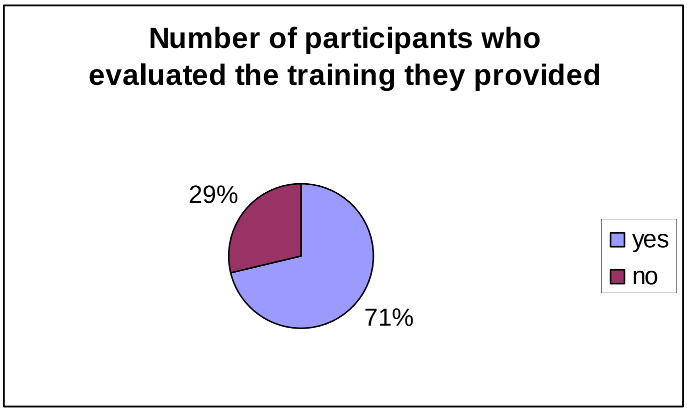
n= 28

Table 13 and figure 7 show the number of participants who evaluated the training that the staff received. A total of 20 out of 28, 71% reported that they did evaluate their training. (Those who answered no to giving training were put under no for evaluating training)

Table 13:

Evaluate Training	Number of Participant
Yes	20
No	8

Figure 7:



n= 28

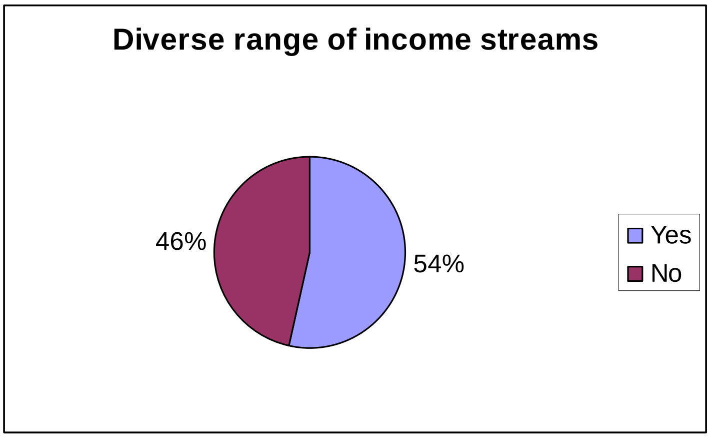
4.6 Income

Table 14 includes organisations' gross net incomes of the last reported financial year against all the areas discussed above and within the questionnaire, to help pin point any trends.

Those organisations with a higher gross net income, over £500,000, were more likely to have in place a business plan and partnerships and to take part in bidding for contracts and monitor and evaluate their work. 25 out of 28 organisations received a portion of their income from local authority compared with only 12 participants who receive a portion of their income through their own income generation, either through sales, social enterprises or charging for some of the services which they provide and 13 participants who raised through either donations or fundraising. The majority of organisations had at least two forms of funding streams however, 6 participants relied solely on funding from local authority or other grant giving institutes such as the lottery.

15 out of 28 participants, 54%, considered themselves to have a diverse range of income streams. *Q= Do you consider yourself to have a wide range of income streams?*

Figure 8:



n=28

Table 14:

Income (Nearest £10,000)	Sources of income / funding	Diverse income	Business Plan	Partnership	Contracts	Monitor Work	Evaluate Training
0	none	no	not complete	not yet	no	no	no
0	public donations, lottery, membership, food for members	no	yes	voluntary	no	no	no
2,000	subscriptions, auctions, fundraising	no	no	voluntary	no	no	no
20,000	Lloyds TSB foundation, ACC	yes	yes	voluntary, private, public	no	yes	yes
20,000	local donations, locally authority, applying for grants	no	out of date	public, negotiating voluntary	no	yes	yes
30,000	grants, donations, fundraising, workshops funded and part funded	yes	not complete	no	no	yes	yes
50,000	ACC - SLA	no	yes	Public	no	no	yes
130,000	lottery, SLA, council shop, car boot sales	no	yes	voluntary, public	no	yes	yes
170,000	statutory income, contracts, grants, fundraising, voluntary income	yes but could be more	yes	voluntary, public	no	yes	yes
180,000	local authority, fundraising	not enough	yes	Voluntary, Public	no	yes	no

Income (Nearest £10,000)	Sources of income / funding	Diverse income	Business Plan	Partnership	Contracts	Monitor Work	Evaluate Training
270,000	local authority - grant, fundraising	no	no	no	no	no	no
280,000	local authority, fundraising/ donations and grants	yes	yes	Voluntary	no	yes	yes
290,000	ACC - SLA, NHS, grant	yes	yes	no	no	no	yes
340,000	local authority	no	not complete	voluntary,	yes	yes	yes
350,000	grant, own income - sales, workshops, meeting room space, SLA, other services	yes	yes	voluntary, private, public	no	yes	no
360,000	self sufficient after this yr	yes	yes	private	no	yes	yes
370,000	various public bodies, social enterprise, charge for services (areas of expertise)	yes	yes	voluntary, public, private	yes	yes	yes
470,000	grants not sure	not sure	not sure	no	not sure	no	yes
520,000	local authority, grants, own income	yes	not complete	voluntary, public, private	no	yes	yes
630,000	own income, SLA, various sales and services	yes	yes	voluntary, public, private	yes	no	yes
770,000	NHS, donations funding for training	yes	yes	Voluntary, Public, Private - intermittent	yes	yes	yes

Income (Nearest £10,000)	Sources of income / funding	Diverse income	Business Plan	Partnership	Contracts	Monitor Work	Evaluate Training
850,000	SLA, local authority, fundraising	yes	yes	voluntary, public	yes	yes	yes
1,020,000	local authority, NHS, city and shire, SLA, Service Scotland, Comic Relief	no	yes	voluntary	yes	yes	yes
1,840,000	local authority - block funding, fundraising for specific projects	no	yes	public	no	yes	no
4,730,000	own income, grants for development, trying to develop other projects	yes	yes	voluntary, private, public	yes	yes	yes
5,630,000	local authority, public, fundraising	yes	yes	voluntary, public	no	yes	yes
10,670,000	local authority, social enterprises, fundraising initiatives	yes	yes	Private, Public	yes	yes	yes
11,780,000	own income, grant	no	yes	voluntary, public	yes	yes	yes

5.0 Discussion

5.1 Planning

Only 17 out of 28, 61%, participants had an active business plan in place with an income generation or fundraising strategy. This therefore highlights that many of the organisations are not planning forward and are not thinking about where their money is coming from. This could highlight a risk of stagnating for these organisations as it suggests they are not making plans to move forward.

5.2 Partnerships

17 out of the 28 participants had partnerships in place with other voluntary organisations. Partnerships generally got a good response with everyone who said they were involved in a partnership speaking positively of them, only one said they would not consider a private or public partnership because they were concerned about losing control and only two of the participants said they would not consider any type of partnership. When looking more closely at the participants who said they would not be interested, they were small organisations and it was because the felt that a partnership would not fit the organisation because it wanted to remain as a one off and not expand. These responses are interesting as it may be an alert that a selection of organisations may have the wrong perception of partnerships and therefore are writing it off prematurely.

Out of those involved in partnerships and those interested in getting involved in one, the benefits and perceived benefits varied. The main benefit however, was the knowledge and experience that could be shared and gained from one another.

The figures showed that there were 11 participants who were not involved in a voluntary partnership, 11 with a public partnership, and as many as 20 participants had no involvement in a private partnership. In total there were 5 participants who had no partnerships at all. There was however, no definition of partnerships given to the participants apart from being someone who helped to promote or deliver a service, and therefore it was open to their own interpretation of what they considered to be a partnership, weather this be a formal written agreement or informal. However, even with the possibility that all the respondents interpreted this to mean a formal partnership the figures of 10 with no partnerships with other voluntary sector organisations and 11 with no partnerships with public sector organisations are still very high.

5.3 Contracts

Nine of the twenty eight participants were involved in bidding for contracts, however none of these organisations were involved on a large scale and the contracts were mainly in Aberdeen and Aberdeenshire, however, three of the participants were also involved all over the country, one participant between Elgin and Aboyne, another included Angus and one other included Angus and Moray. Out of these participants only five had been successful, the others were either non successful or still awaiting feedback on their first contract. All the contracts that were bid for were always closely linked to the organisations service and the for those participants who had been involved in bidding more than once the majority tended to bid for the same type of contract each time. Although it is showing positive that organisations are beginning to get involved in bidding for contracts and bidding for ones you know you can be successful with is a good starting point according to the literature bidding for the same contracts each time may ultimately not be the best way forward, "Don't take the same old project you always have," (Jump, 2009).

All the organisations bidding for contracts had been formed for at least eight years, the majority being formed before 1987. All of these were also involved in partnerships with either voluntary, private or public organisations and all of them evaluated the training that they provided. All but one participant also had adequate systems in place to monitor their work; the one who did not had only been involved in one contract and had been unsuccessful. Added to this all but one organisation who was bidding for contracts had an active business plan in place, and the one who did not was in the process of completing theirs. This therefore could suggest that a business plan, partnership, monitoring work and evaluating training are all important elements of being able to bid for contracts.

Those who were bidding for contracts all had a gross net income over £300,000 which could suggest organisations are more likely to feel in a position to bid for a contract when they were taking in a larger income. There were four organisations however, earning more than this that were not bidding and had all the other areas in place, mentioned above, and therefore having all these in place will not necessarily make the organisation feel they want to or feel ready to bid. This therefore may indicate that helping the other organisations to get partnerships and business plans etc, in place will not be the only way to get them into the position of bidding but there may be a need to change their attitudes towards it also.

For those participants who were involved in bidding 5 had been successful and their reasons for this included:

- Demonstrating themselves as a strong business
- Having a strong track record
- Lengthy experience in dealing with contracts
- Had done good background work
- Met the study requirements
- The service was easy to build on
- The organisation had access to a large number of people

Reasons for being unsuccessful varied, although four participants said it was due to cost; that they were not the cheapest option or there was a lack of money to develop the project proposed. This could indicate that the commissioners are perhaps choosing contracts only based on cost rather than the best value for money. Other reasons included:

- The geographical location of the organisation was considered too far away for the project
- The presentation was poor
- The high level of applications
- The organisation was not what they were looking for
- Because of the type of organisation they could not show the difference that had been made because of the ongoing work that is needed with many of the clients
- There was simply someone better

When looking at the perceived obstacles to bidding there was a wide range of thoughts. The most popular reason, with nine participants feeling the same way, surrounded the capacity of the organisation with people feeling they lacked in size or resources. Following that a few said that they felt it wasn't option or that they had not considered it or that they just were not interested. These reasons are left quite open and may hide other issues, such as a) capacity which was already raised, b) awareness issues such as the risks of being grant dependant, and being unaware of the benefits and possibilities and c) a lack of aspiration which again may disguise awareness of the risks of stagnating and being grant dependant, which one participant actually highlighted as being the problem with receiving more money –you run the risk of stagnating because money is handed out to you instead of needing to find new alternative ways to survive and thrive.

When asking the participants if they felt there were any ethical issues involved with bidding for contracts, the majority felt that they would not have to compromise their values in order to become more competitive or contracts or many answered that if they were faced with that they would not consider it. The answer to compromising activities however was more open with respondents saying that they might consider it to a degree as long as it was not at a detriment to their business or it would help in the long term. Most said that they would keep their core activities the same but may either branch into another area, or change some of their extra activities slightly to suit. There were only two really negative ethical responses to contracts, which were from participants who had not been involved in contracts, which were, a) they felt that bidding generates lowest quality and cheapest service and de-motivates the service and demoralises the staff and b) they felt they would need to compromise their values and activities and that this was probably the reason that they had not gone down this route before.

5.4 Support

Suggestions for support were very wide between organisations and very dependant on what position the organisation was in; in terms of how developed they were and how much support they already received through national bodies and other partnerships. However, although the type of support was wide spread all suggestions could be easily categorised into 7 categories. Money was the category that the majority of participants found they required help with, however looking at the suggestions in detail this was not participants asking for money but asking for support in generating other stream, either through writing proposals, marketing themselves or in how to develop a fundraising strategy. A lot of the support that participants were saying they needed were often things that could be easily covered in workshops and were often things that many people could benefit from.

5.5 Training

There are a large number of participants who stated they spent nothing on training and if we were to assume that those participants who were unaware probably have a low budget then this figure may be even bigger. The majority of training that was being offered to both paid and voluntary staff included in-house training such as inductions, first aid, manual handling etc, followed by specialist training, which was training which closely linked to the individual’s job and the service the organisation provided.

The figures for those who monitor their work and evaluate their training is high, however, this is a requirement from most funders and so it is not clear whether or not they are using it as an effective management and development tool or just to meet the funders requirements.

5.6 Income

Table 9 shows that with an increased income of over £500,000 organisations are more likely to have in place a business plan and partnerships and to take part in bidding for contracts and monitor and evaluate their work. Thus suggesting that having these things in place in will ultimately lead to a higher gross net income and therefore assumes these organisations are better placed to have a bigger impact on society and the economy.

6 out of 28 organisations are solely dependent on income from the local authority and/or grants from other institutions such as the lottery and less than half the participants are generating income from their own income. This highlights a great dependency on grants from local authority and other institutions which may be very risky in the current climate, as cuts may be forced.

Although 54% of participants felt they had a diverse range of income streams there was no definition given of this and therefore the interpretations of diverse may have differed between one another. There was also no question of what the impact could be if one of their income streams was cut back.

6.0 Conclusions

- The results showed those organisations who were bidding for contracts as the majority being formed before 1987, had an active business plan in place, were involved in some form of partnership and were self auditing their performance through monitoring their work and evaluating their training. This indicates that in order for organisations to be in a position to bid they need to start putting these areas into practice. Added to this, organisations with a net income of over £500,000 were more likely to have these foundations in place also.

- Partnerships generally evoked a positive response from all those involved and according to the research literature and the results from what can be gained, partnerships appear to be a positive move forward in terms of supporting the business. There are still some negative perceptions of partnerships but these were from organisations that were not involved in them and therefore may actually surround a lack of knowledge rather than a partnership not being good for the organisation.

- The main reason for not being successful with a contract surrounded cost, that compared to their competitors they were unable to compete.

- The most popular reason for perceived obstacles to bidding surrounded capacity, which may be linked to having in place the areas mentioned above that those currently bidding have.

- No participants interviewed said they would compromise on their values to be more competitive for contracts.

- No participant said they would compromise on their core activities to be more competitive for a contract however, some participants did say that they would be willing to compromise on their extra activities as long as it was not at detriment to the organisation and had long term benefits.

- The majority of suggestions for support surrounded monetary support, in terms of how to be attractive to funders and help with a fundraising strategy. The type of support required was varied between organisations but broadly concerned access to knowledge on contracts and employment law, a demand for more business training and better access to networks.

- A large amount of organisations are dependant on funding and grants from local authority and other trusts and bodies, without having an element of self sufficiency which is potentially risky if this money is cut due to the recession.

7.0 Recommendations

7.1 Recommendations for the Aberdeen Third Sector Working Group to consider:

- Encourage and assist the Third Sector to incorporate business planning, which includes details of an income generation or a fundraising strategy, and to self audit the service they provide.

- Enable the sector to access appropriate information and support relevant to their business needs. This could include advice and information on bidding for contracts, employment law and in accessing monetary support from a variety of sources, such as how to attract new funders, or how to generate their own income.

- Encourage the public sector to continue maintaining a fair and equal bidding process, so it takes account of varying factors, including social benefit as well as cost.

- Find a way of best practice organisations sharing their information and business knowledge with smaller organisations. This could include talks, training and workshops.

7.2 Recommendations for further research

- Investigate best practice of successful partnerships currently operating in the Third Sector. Results of this may then be usefully communicated to not only the Third Sector but public and private sectors also, so that they can see how to go about achieving a partnership and the value it can bring. It may also be necessary that the council looks closely at how to involve the private sector, whether the partnership will produce enough benefits for them to want to form one or if they need to consider other incentives
- There is a need to look closely at how organisations currently self audit themselves (monitor work, evaluate training, etc) in order to improve efficiency in providing their service. Therefore it may be necessary to study how organisations currently use or do not use performance measures in place and identify what KPIs are most suited to the 3rd sector. KPIs need to be carefully considered to give the right end result, it is important that organisations do not lose their social benefit by concentrating too hard on monetary results.
- Investigate if there are capacity issues with regard to bidding, and if there are explore whether or not these can be resolved.

Appendix A

Questionnaire

General questions about organisation:

1. Name:
2. Name of Organisation:
3. ACVO Member:
4. Is your organisation a registered charity / is it limited by guarantee?
5. When was the organisation formed?
6. What field do you work in/what is your main service?
7. On average how many clients do you serve a month?
8. How many paid staff does your organisation have? (include sessional workers)
9. How many voluntary staff does your organisation have? (include committee members)
10. Does your organisation have its own website?
11. Do you have your own office space?
12. What is your main source of funding? (Specific – ACC- which one, grant/SLA/contract)
13. Do you consider you have a diverse range of income streams?
14. How far does the statutory funding you receive meet your organisations needs?

Business Planning

1. Does your organisation have a business plan? (strategy/aims/objectives/goals) (if no move on to next set)

2. What time scale is this on? (2/3/5 yrs)

3. Does it include details of an income generation/fundraising strategy which is in use by management?

4. Do you have an active Management Committee to carry out that plan?

5. What type of support do you think you will need to support you in achieving your plans objectives?

6. Do you have an appropriate and secure premise to allow you to achieve your goals/objectives in the business plan for the next 5 years?

Partnering

1. Do you work in partnership with other voluntary organisations to deliver or promote services? Who?

2. Do you work in partnership with other private sector organisations to deliver or promote services? Who?

3. Do you work in partnership with other public organisations to deliver or promote services? Who?

4. If yes how does this benefit you?

5. If no have you considered it – why/why not?

Contracts

1. Is your organisation involved in bidding for contracts? - Yes go to Q. 4

2. If not are you aware whether this would be an option for you?

3. If aware why have you not got involved so far – would you be interested in getting involved? (skip to Q. 10)

4. What type of contracts do you go for?

5. Do you go for solely Aberdeen or other areas?

6. Do you bid for the same type of contract each time or do you bid for different ones?

7. How successful have you been?

8. Have you thought why this might be? If you were unsuccessful did you seek feedback?

9. Have you thought of the reasons why contractors or sponsors would or would not choose you over your competitors? What are the reasons?

10. What would you consider to be the obstacles in the way of your bidding for particular contracts?

11. Do you feel you would need to compromise any values in order to make yourself more competitive for contracts?

12. Do you feel you would need to compromise any activities in order to make yourself more competitive for contracts?

13. Are you involved with any other income generating activity?

Support

1. What type of support or support networks for developing contracting or other business do you use at present? If none why not? (depending on answer skip to Q.3 or next section)

2. What is your perception of the support you currently receive towards developing business activity such as contracting?

3. What type of support do you think would be useful to make you more competitive or support you with your business in general?

Training

1. How much does your organisation currently spend on training staff of volunteers annually?

2. What kind of training do your employees or volunteers currently receive?

3. Do you have adequate systems to allow for monitoring your work?

4. Do you evaluate the training you provide?

Appendix B

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