



Social Economy Mapping Study

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1. Summary

The Newry & Mourne Local Strategy Partnership (LSP) established under the EU Programme for Peace and Reconciliation (Peace II) administers funding for Priority 3 Measures 1 and 2 in the Newry & Mourne District. These are:

- 3.1 Local Economic Initiatives for Developing the Social Economy
- 3.2 Locally Based Human Resource Training and Development Strategies

The LSP has been allocated £3.3 million for these two measures which aim to address the legacy of the conflict and take advantage of the opportunities arising from peace. This includes £0.5 million for a Social Economy Programme. The LSP has defined indicative actions for this programme which should establish a number of community/voluntary sector led social enterprise and regeneration initiatives which may address the following: -

- Meet the needs of communities not currently being met thus contributing to a sustainable local economy
- Focus on a range of themes e.g. environment, recycling, childcare & health.
- Provide support for people previously excluded from the labour market.

In the LSP's Action Plan, it is anticipated that the programme will lead to:

- The establishment of at least 4 transitional labour market / social enterprise schemes
- Participation of at least 20 community groups in transitional labour market schemes
- Participation of at least 40 people excluded from the labour market

Venture has undertaken a mapping study into the scale and extent of the social economy sector in Newry & Mourne on behalf of the LSP. This report describes the terms of reference of the mapping study, the methodology and key findings. A series of recommendations has been made and an Action Plan produced. This will inform future investment in the sector and guide the strategic development of the social economy in Newry & Mourne.

Outputs from the study include:

- **A practical working definition suited to the development of the sector within Newry & Mourne.** The social economy in Newry & Mourne is characterised as follows:

Characteristic	What this means
Social objectives and community benefit	Primary purpose is to address some social need and to improve quality of life in community
Local ownership and local participation	Locally based organisation with active participation from local community
Democratically governed	- Open and transparent process for membership of organisation and management committee - Voluntary directors - Regular meetings - Regular change in management committee members - Regular change in office bearers - Representative of community it serves
Accountable	- AGM held - Annual accounts published and audited - Users needs are taken into account - Users are kept informed of what the organisation is doing
Not for profit	Any surpluses are principally reinvested back into community
Income generating	Exchange of goods/services and generating some income independently of grant-aid

- **An analysis of the size and nature of the sector within the District.** In the social economy continuum, the majority of organisations focus on building social capital; whilst a minority are in a position to generate some income and fall within the social enterprise category. However, even within the social enterprise category, there is a continuum of development.



The three tiers (or categories) within the social economy are described below.

Where	What this means
Outside	Community and voluntary sector organisations not currently operating within the social economy; focused on social activity and do not recognise the potential of social economy as a route to sustainability. Do not wish to get involved in trading activity.
Developing	Community and voluntary sector organisations providing goods or services in exchange for payment or through a contract e.g. luncheon club. Recognise the need to generate income and effectively run micro-businesses but do not necessarily see themselves as such. Likely to have undertaken some training and developed some skills but lack relevant expertise in business planning, etc. Require practical support e.g. small grants for equipment, promotion.
Developed	Well established and developed social economy organisations with a good track record and clear understanding of their position. Need to share good practice and act as role models for developing organisations. Need to consider use of surpluses (reinvesting into community), social auditing, new ideas.

- **Identification of interventions for a £0.5 million social economy programme which are consistent with the Integrated Local Strategy.** Interventions have been identified to address the strategic issues in the sector and to move towards the vision defined for the sector. The vision for the social economy sector in Newry & Mourne is:

A strong, visible social economy sector in Newry & Mourne with both a social and an economic focus, promoting best practice, providing a clear pathway to sustainability through income generation and addressing social needs at a local level.

In order to achieve this vision, five strategic aims have been identified:

- To improve awareness, understanding and opportunities for growth of good practice organisations in the social economy sector in Newry & Mourne
- To improve skills, knowledge and performance of the social economy sector across the Newry & Mourne area
- To provide appropriate resources for new or developing social economy enterprises engaged in income generating activities
- To provide leadership and networking opportunities for those active in the social economy sector through an integrated approach by relevant agencies
- To improve governance, user participation and volunteer recognition amongst social economy organisations in Newry & Mourne

- **Proposed areas for potential development of social economy projects.** With regard to social economy activity, there are no obvious geographic gaps. However, there is scope to develop social economy activity in sectors adversely affected by the conflict and division or experiencing structural adjustment as a result of peace (e.g. tourism, entrepreneurship, arts and

sports). In addition, certain types of social economy enterprise may be absent from Newry & Mourne, including employee owned businesses, intermediate labour market companies, housing associations, LETS and social investment funds.

Beneficiary groups which address the needs of particular communities and groups economically or otherwise disadvantaged by the conflict are served by social economy organisations. However, there is scope for greater provision in proportion to the size of each beneficiary group. (The specific beneficiary groups include: victims of the conflict (and their families), ex-prisoners (and their families), displaced persons, former members of the security and ancillary services, young people, women, older workers and the long term unemployed).

2. Terms of Reference

The aim (as stated in the Terms of Reference) of this mapping study is to develop the social economy. The study therefore undertook to:

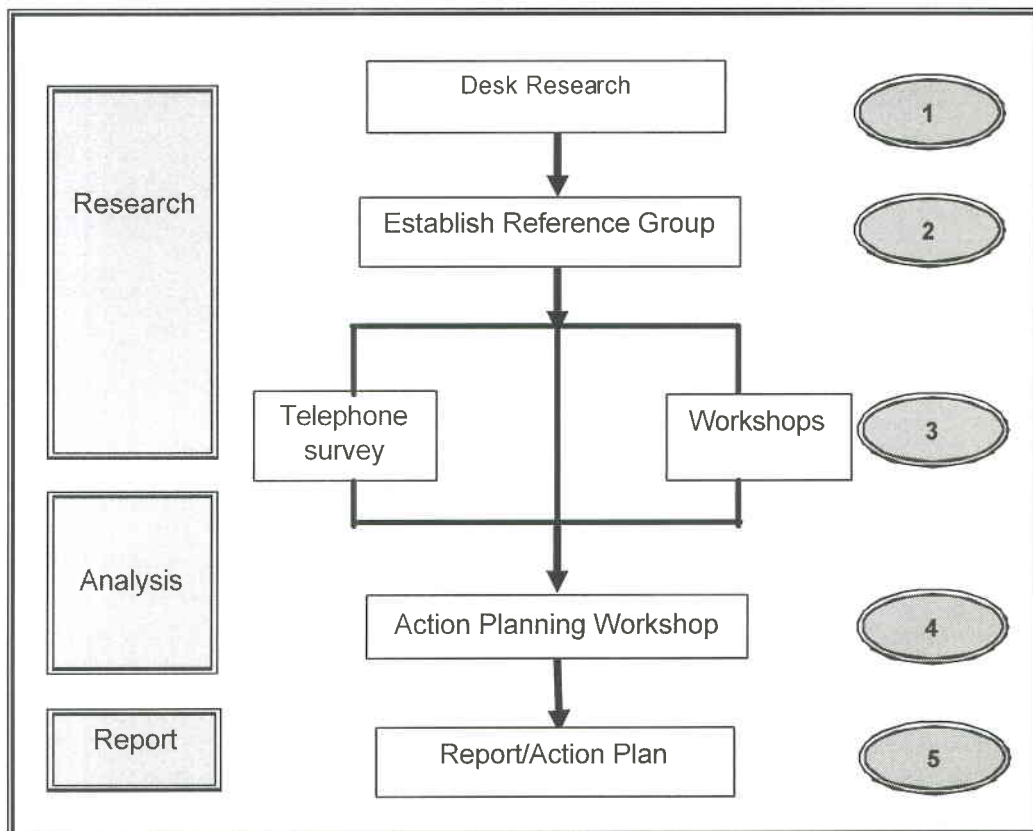
- ⇒ Identify and map the extent and nature of the social economy sector in the Newry & Mourne District
- ⇒ Identify the number of social economy projects in Newry & Mourne District (and where they lie on a continuum of development)
- ⇒ Identify the needs (e.g. training and other support) of the social economy sector in the Newry & Mourne District
- ⇒ Identify the potential for developing new and existing social economy projects in the Newry & Mourne District
- ⇒ Consider the impact of recommended interventions in the social economy sector on New TSN.

Key outputs from this study are:

- ⇒ An exploration of existing definitions of the social economy and the formulation of a practical working definition suited to the development of the sector within Newry & Mourne District
- ⇒ A map of existing social economy projects within the Newry & Mourne District (including number of and status on a continuum of development)
- ⇒ Identification of interventions for a £0.5 million social economy programme which are consistent with the Integrated Local Strategy.
- ⇒ Gap analysis identifying areas for potential development of social economy projects.
- ⇒ A comprehensive action plan which fits with the Integrated Local Strategy and other relevant plans and strategies in Newry & Mourne. This documents the style and type of intervention required to assist the sector to develop and importantly to sustain activities in the longer term.

3. Methodology

The approach adopted in this assignment is illustrated in the diagram below. Each of the five stages is discussed in more detail after the diagram.



3.1 Stage 1 - Desk Research

Desk research was undertaken to review existing issues relating to the social economy sector in Newry & Mourne and to examine the wider Northern Ireland context. This focused on the review undertaken by Colin Stutt et al¹ and other models from further afield. A summary of sources consulted is included in Appendix 3.

3.2 Stage 2 - Social Economy Reference Group

A Reference Group comprising representatives of the LSP and other stakeholders in the District (see Appendix 1) was established. The role of the Reference Group was to:

¹ The Social Economy in Northern Ireland: A Policy Review, June 2001. www.colinstutt.com/social_economy.htm

- represent stakeholders in the social economy
- provide local knowledge, experience and expertise
- guide the research and development of the Action Plan
- own the Action Plan.

Facilitated by Venture, the Reference Group met on three occasions to:

- agree a working definition of the social economy that is relevant and appropriate to Newry & Mourne
- identify key stakeholders who should be surveyed as part of the study
- identify key issues which should be addressed in the consultation
- provide input into the Action Plan and report.

3.3 Stage 3 – Consultation with Social Economy stakeholders

A telephone survey was undertaken to assess current provision within the social economy sector. A copy of the survey is included in Appendix 2. The main topics covered were:

- Organisation characteristics
 - ❖ Length of time established
 - ❖ Legal status
 - ❖ Organisation description
 - ❖ Geographic area served
 - ❖ Social objectives
 - ❖ Goods or services provided
- Size and scale
 - ❖ Number of staff, volunteers, users, members
 - ❖ Premises and vehicles
 - ❖ Open membership
 - ❖ Size and composition of management committee
 - ❖ Profile of users/beneficiaries
 - ❖ Income – level and sources
- Accountability and governance
 - ❖ Process to join management committee
 - ❖ Limits on term in office
 - ❖ Turnover of management committee
 - ❖ Frequency of management committee meeting
 - ❖ AGM held
 - ❖ Number attending AGM
 - ❖ How needs of users/beneficiaries are taken into account
 - ❖ How users/beneficiaries are kept informed
 - ❖ Annual accounts published
 - ❖ Audit of annual accounts
- Development
 - ❖ Use of financial surplus (if any)
 - ❖ Providers of support

- ❖ Barriers to developing projects
- ❖ Ideas for commercially viable activity
- ❖ Training and other support needs

Details of 61 organisations (considered to be representative of the social economy sector in Newry & Mourne) were proposed by the Reference Group. All were contacted during the weeks commencing 9 and 16 June; 34 questionnaires were successfully completed (see Appendix 1). Of the remainder:

- 19 were tried on at least 3 occasions
- 5 were wrong numbers (and if available, alternatives were also unsuccessful)
- 2 did not wish to participate

Three geographically based workshops were organised (Newry, Crossmaglen, Kilkeel) for potential beneficiaries and other stakeholders of social economy activity. Invitations were issued to over 300 community and voluntary sector organisations; workshops were also advertised in the local press.

The workshops, held during the week commencing 16 June, were attended by 39 people representing 26 organisations (see Appendix 1). At the workshops, consideration was given to:

- understanding of the social economy
- SWOT analysis of the social economy in Newry & Mourne
- opportunities for developing social enterprises in Newry & Mourne
- training and other support needs for the social economy in Newry & Mourne

3.4 Stage 4 - Reference Group Analysis and Action Planning

Findings from the surveys and workshops were presented to the Reference Group for analysis. This Action Planning workshop considered:

- An appropriate definition of social economy for Newry & Mourne
- A vision for the social economy in Newry & Mourne
- Interventions to help to achieve the vision

3.5 Stage 5 - Report on Social Economy Sector in Newry & Mourne

This report includes results from the research and a comprehensive Action Plan for the development of the social economy sector which is consistent with the Integrated Local Strategy.

4. The Social Economy in Newry & Mourne District

4.1 Defining the social economy

The social economy is important because it addresses both social and economic needs, involves local people and contributes to the sustainability of communities. The fundamental role of social enterprises is to address social needs and specifically market failure i.e. those gaps which are not being serviced by the public sector and areas in which the profit-driven private sector would not consider engaging.

The social economy does not easily lend itself to a hard and fast definition. To many both within and outside the sector, the term social economy is a confusing and defining its size, scope and purpose has been a subject of considerable debate. However whilst it may not be possible to specify a precise definition which satisfies all those with an interest in the sector, it is possible to consider the distinctive characteristics of social enterprises, by considering their value base and underlying principles.

The social economy is based on the principles of self-help and mutuality, of caring for others and of meeting social needs rather than maximising profits. It is characterised by local people taking action on a collaborative basis to address local needs. By its very nature, the social economy is constantly changing as key issues are resolved and addressed (and may be absorbed into the public or private sectors) and new issues arise. Therefore an inherent aspect of social economy organisations should be an ongoing re-evaluation of their role (or purpose) and the needs to which they are responding.

The Department of Enterprise, Trade and Investment commissioned a review of the Social Economy in Northern Ireland which was published in June 2001². The review defined social economy organisations as those which:

- have a social, community or ethical purpose
- adopt an explicit, market-based business model, and
- have a legal form appropriate to a not-for-personal-profit status.

The review concluded that the essence of the social economy is in the application of an explicit business model to not-for-personal-profit organisations with a social, community or ethical purpose. It is also worth noting that organisations operating in the social economy will fill a gap which is not addressed by the public or private sectors and may be competing with the black economy.

² The Social Economy in Northern Ireland: A Policy Review, June 2001. www.colinstutt.com/social_economy.htm

The types of social economy structures which have been identified include:

Employee owned businesses	Creating, maintaining and rescuing jobs as part of the local economic development activity
Credit Unions	Providing access to community finance
Co-Operatives	Associations of persons united to meet common economic and social needs through jointly owned enterprises
Development Trusts	Key community structures in community based renewal and revival
Social Firms	Providing employment and training to people with disabilities and to other disadvantaged groups
Intermediate Labour Market Companies	Providing training and work experience for the long-term unemployed
Community Businesses	Enterprises which have a strong geographical definition and focus on local markets and local services
Charities' Trading Arms	Enabling charities to meet their objectives in innovative ways as trading companies
Housing Associations	Providing social housing
Local Enterprise Agencies	Stimulating business and economic growth across N Ireland
Social Investment Funds	Using investments funds to achieve social economy objectives
LETS (Local Exchange Trading System)	Local community-based mutual aid network in which people exchange all kinds of goods and services, without the need for money

The Social Economy Agency contributed to this review³ and identified three common characteristics of social economy enterprises:

- ✦ **Enterprise focused:** directly involved in production of goods or supply of services to a market aiming to make a surplus from trading
- ✦ **Explicit social aims:** job creation, training and provision of local services
- ✦ **Local ownership:** autonomous organisations with governance and ownership structure based on participation by stakeholder groups (users or clients, local community groups etc) or by trustees.

4.2 Defining the social economy in Newry & Mourne

The Reference Group considered a number of definitions of the social economy (Appendix 3) and drew on knowledge of existing social economy enterprises to develop a working definition of the social economy in Newry & Mourne. Based on this information, six key characteristics were initially identified.

However, feedback from consultation illustrated concerns about the proposed definition. There is a lack of recognition of the terminology used and, often, organisations operating in the social economy do not recognise themselves as

³ Defining & Explaining Social Economy Structures, Paper submitted by the Social Economy Agency (Available at www.colinstutt.com/social_economy.htm)

being part of it. Therefore the language was revised based on feedback from consultation and from the Reference Group. The definition of social economy adopted in Newry & Mourne is explained in the table below.

Characteristic	What this means
Social objectives and community benefit	• Primary purpose is to address some social need and to improve quality of life in community
Local ownership and local participation	• Locally based organisation with active participation from local community
Democratically governed	• Open and transparent process for membership of organisation and management committee • Voluntary directors • Regular meetings • Regular change in management committee members • Regular change in office bearers • Representative of community it serves
Accountable	• AGM held locally • Annual accounts published and audited • Users needs are taken into account • Users are kept informed of what the organisation is doing
Not for profit	• Any surpluses are principally reinvested back into community
Income generating	• Exchange of goods/services and generating some income independently of grant-aid

To use a definition as a practical way of identifying and prioritising suitable projects for funding, clarity is required. This definition might apply to many existing community and voluntary sector organisations within the District that are mainly concerned with community development activity. However it should **only apply** if these organisations promote projects which would move them towards being part of the social economy. In this case, they would be eligible to apply for funding (see 5.4).

It is worth noting that evidence from the workshops suggests that the concept of social economy is not widely understood. The Reference Group recognises the need to raise awareness, exchange experience and promote the concept more widely within Newry & Mourne (see 5.2).

4.3 Characteristics of the social economy

4.3.1 Sample

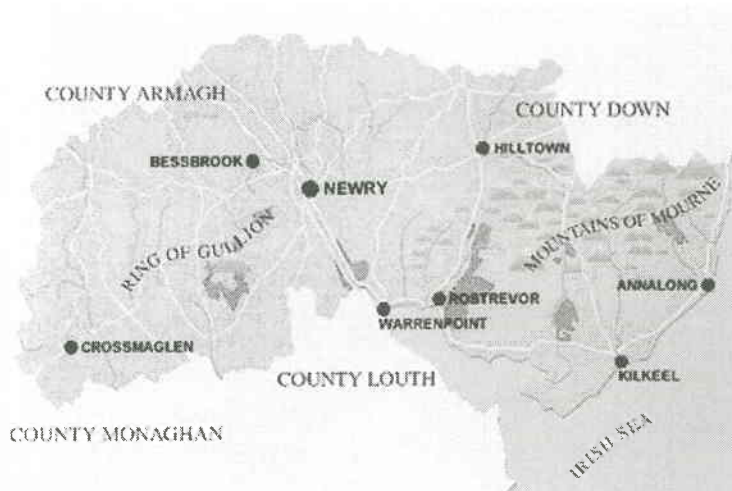
A number of organisations were identified by the Reference Group as operating within the social economy sector in Newry & Mourne: 61 of these were selected to be surveyed; of these 34 were successfully completed. The sample of 61 organisations encompassed a range of:

- Development
- Activities
- Geography (including South Armagh, Newry and South Down)

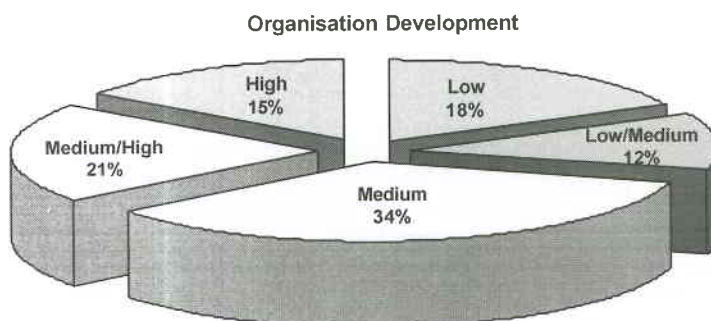
To gain an insight into the organisations operating in the social economy details of the telephone survey results are discussed below.

4.3.2 Profile

The 34 organisations, which were surveyed, represented all parts of the Newry & Mourne District. About half were from South Down and about a quarter from each of South Armagh and Newry.



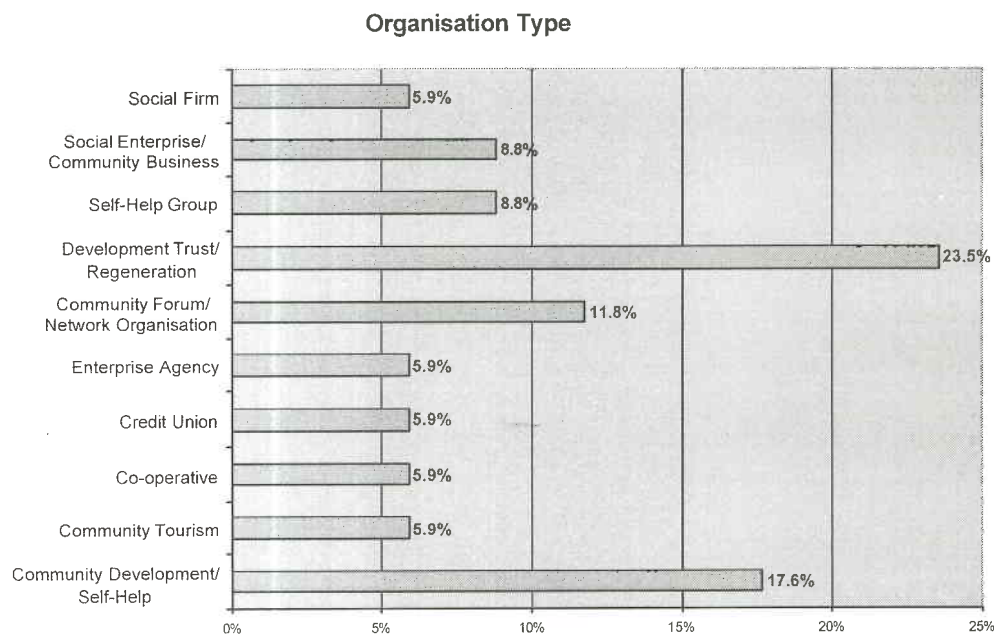
The organisations surveyed were at various stages of development: with a fairly even three way split between Low–Low/Medium, Medium and Medium/High–High.



Those organisations which responded included a variety of types. Over half of the organisations are categorised as one of the following three types:

- regeneration (24%)
- community development/self-help (18%)
- community forum/network organisations (12%)

The remaining organisations covered a diverse range of organisation types.



Referring to the various social economy structures (see 4.1), no employee owned businesses, intermediate labour market companies, housing associations, LETS, charities' trading arms or social investment funds were identified for participation in the survey. However, some of these may be present in the District.

Over half the organisations provide information and advice, social activities, arts and cultural activities or training. Almost a quarter provide *other* goods or services including:

- Dancing
- Education
- Health
- Farming supplies
- Property sales
- Foreign Exchange service
- IT Service and learning
- Self Catering accommodation
- Workspace

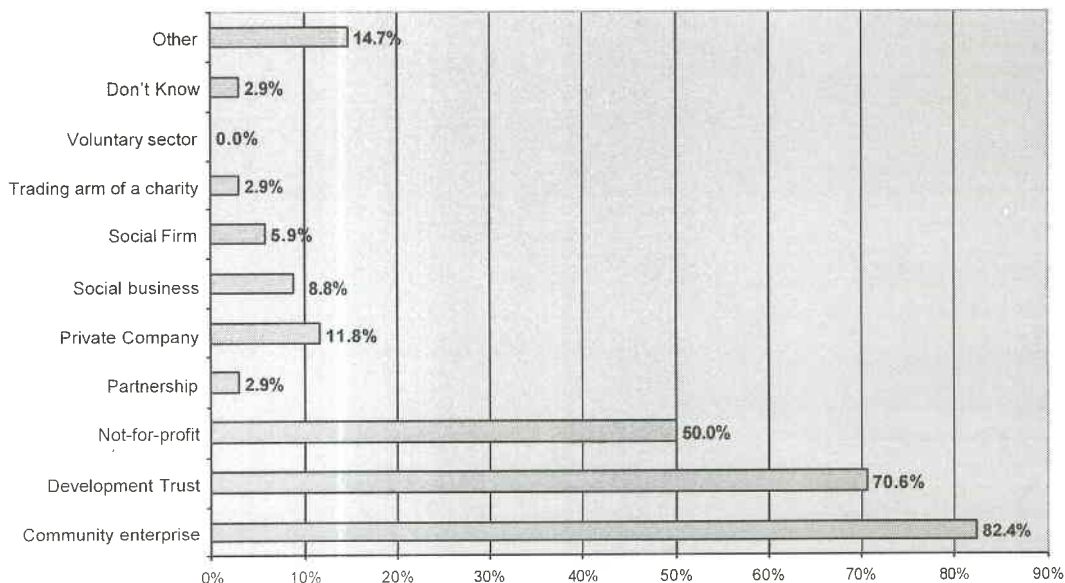
Goods/Services	% ⁴
Information and Advice	58.8%
Social Activities	55.9%
Arts and Cultural Activities	52.9%
Training	50.0%
Advocacy/Campaigning	26.5%
Resource Centre	26.5%
Other	23.5%
Childcare	20.6%
Workspace	20.6%
Financial Services	11.8%
Housing	11.8%

Most organisations (over 80%) consider themselves to be 'Community Enterprises'. 'Development Trust' (70%) and 'Not for profit' (50%) are also

⁴ Respondents could select more than one response; therefore the total of all responses exceeds 100%.

commonly used terms to describe these organisations. None of those surveyed described themselves as 'Voluntary sector'.

How Organisations Describe Themselves



Over 40% of organisations are limited companies, whilst just over 20% are community groups with a constitution. The majority (95%) have been operating for at least three years, so have built up a reasonable track record. There is also a sizeable proportion of more mature organisations: almost a fifth have been in existence for between 20 and 40 years.

Legal status	%
Community group with a constitution	20.6%
Company limited by guarantee	41.2%
Company limited by share	2.9%
Co-operative	2.9%
Industrial and Provident Society	8.8%
Don't know	8.8%
Other	14.7%

Length of time in existence	%
Less than a year	2.9%
1 to 2 years	2.9%
3 to 5 years	29.4%
6 to 10 years	23.5%
11 to 20 years	23.5%
20 to 40 years	17.6%

The organisations surveyed cover a wide geographic spread throughout the District: some cater for large parts of the district (and neighbouring districts), whilst others serve a specific locale.

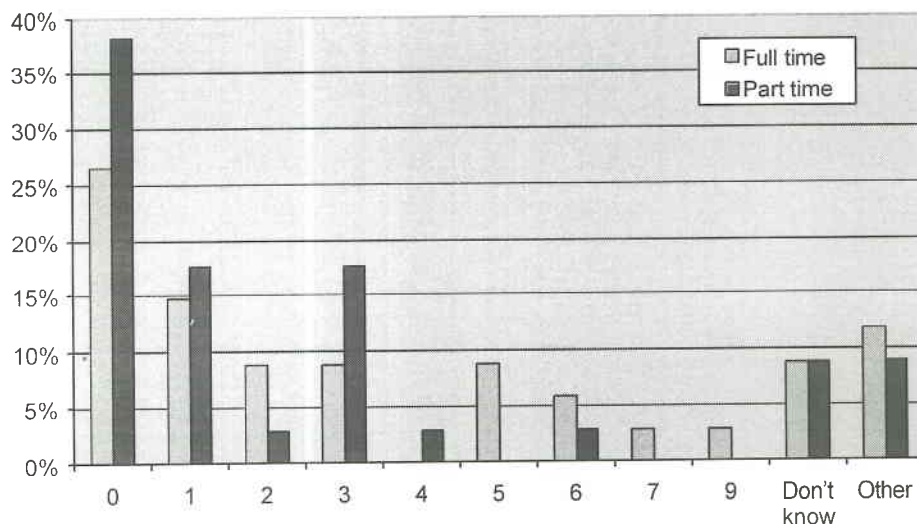
Areas served	% ⁵	Areas served	% ⁵
Annalong	14.7%	Mourne/Mourne & surrounding areas	26.5%
Ballymartin	2.9%	South Armagh	11.8%
Bessbrook	5.9%	South Down	14.7%
Burren	5.9%	Armagh	2.9%
Cloughreagh	2.9%	Banbridge	2.9%
Crossmaglen	2.9%	Other	5.9%
Derrybeg	2.9%	Don't know	2.9%
Hilltown	2.9%		
Kilkeel	14.7%		
Newry	26.5%		
Rostrevor	8.8%		
Warrenpoint	17.6%		

Social economy projects employ on average:

- 4.6 full time positions
- 2.4 part time positions

On average, the organisations surveyed employed between 4 and 5 full time people and between 2 and 3 part time people. However these figures disguise smaller organisations with no staff and larger organisations with many staff (e.g. 3 organisations with more than 10 full time staff).

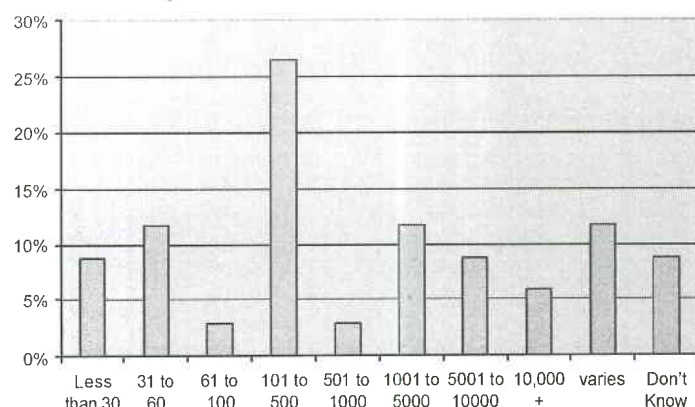
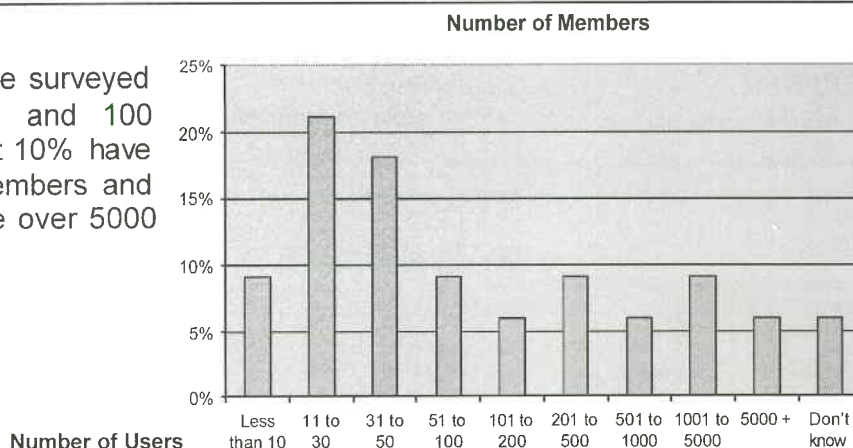
Number of Staff



Significant numbers of volunteers are involved in social economy organisations. Although about one in five organisations stated that they have no volunteers, two thirds have between 1 and 30 volunteers, but only 9% have more than 30 volunteers.

⁵ Respondents could select more than one response; therefore the total of all responses exceeds 100%.

About half of those surveyed had between 11 and 100 members. Almost 10% have fewer than 10 members and just over 5% have over 5000 members.



Considering the number of users or beneficiaries of an organisation's activities, the most common response was between 100 and 500 (over a quarter of those surveyed). A further 12% stated that the number varied. The remainder cited numbers of users ranging from less than 30 to over 10,000.

Beneficiaries of social economy activity cover a wide range of target groups. Over 70% of organisations cater for women, young people, older people, people with a disability, children and the unemployed.

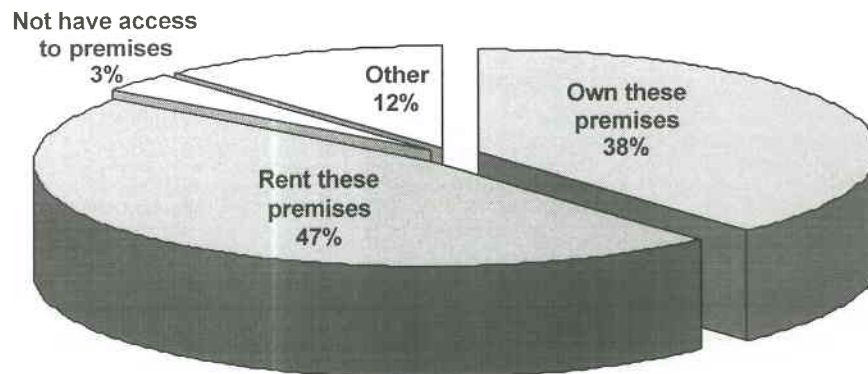
Users of goods/services that your organisation provides	% ⁶
Women	97.1%
Young people	91.2%
Older people	88.2%
People with a disability	85.3%
Children	79.4%
Unemployed	73.5%
Victims of the conflict (and their families)	50.0%
Displaced persons	35.3%
Ex-prisoners (and their families)	32.4%
Former members of security and ancillary services	26.5%
Travellers	8.8%
Other	5.9%

⁶ Respondents could select more than one response; therefore the total of all responses exceeds 100%.

Apart from the demographic groupings, half of the organisations surveyed cater for victims of the conflict; a sizeable minority of organisations (between a quarter and a third) also cater for groups adversely affected by the conflict i.e. displaced persons, ex-prisoners and former members of the security and ancillary services.

Considering physical resources, most organisations operate from premises that they own or rent; 9% of organisations surveyed own vehicles and 24% own workspace.

Premises



Income levels vary from under £1,000 to over £150,000. The organisations surveyed fall into four distinct income categories:

- less than £25K (28%)
- between £25K and £100K (19%)
- more than £100K (28%)
- unknown (25%)

Level of income in last financial year	%
Less than £1000	6.3%
£1,000 - £4,999	3.1%
£5,000 - £9,999	6.3%
£10,000 - £14,999	6.3%
£15,000 - £24,999	6.3%
£25,000 - £49,999	9.4%
£50,000 - £99,999	9.4%
£100,000 - £149,999	3.1%
£150,000 or more	25.0%
Don't know	25.0%

Most organisations are dependent to a greater or lesser extent on grant aid or a public sector contract (see 4.3.8). However three were self-sufficient in that all income was generated through the sale of goods or services, whilst 5 were entirely dependent on grant aid, 2 were entirely dependent on fundraising and 1 was entirely dependent on a contract.

Social economy projects are funded by a cocktail of sources:

- Grant aid
- Contract
- Sale of goods/services
- Fundraising

Having considered the profile of the social economy organisations, each of the characteristics of the social economy definition agreed by the Reference Group has been tested against the data from the consultation.

4.3.3 Social Objectives

Organisations were asked about the kind of social need they addressed. Almost half mentioned Welfare; whilst over 40% mentioned Unemployment or Environmental; just under 40% mentioned Health.

Social Need	% ⁷
Environmental	41.2%
Health	38.2%
Housing	32.4%
Unemployment	44.1%
Welfare	47.1%
Don't Know	5.9%
Other	44.1%

Over 40% of respondents mentioned other kinds of social need from the options provided. These included:

- Finance e.g. loans and funding
- Education
- Personal and Social development for young people (16 – 25 years)
- Social exclusion and deprivation.

Clearly considering the goods and services provided (see 4.3.2) and the profile of users/beneficiaries (see 4.3.2), and the social needs being addressed, it is apparent that these organisations have social objectives at the core of their activities.

4.3.4 Local Ownership and Participation

The profile of organisations already considered in 4.3.2 provides an insight into the geographic area served by social economy organisations and the scale of involvement at a local and district-wide level (numbers of volunteers, members and users).

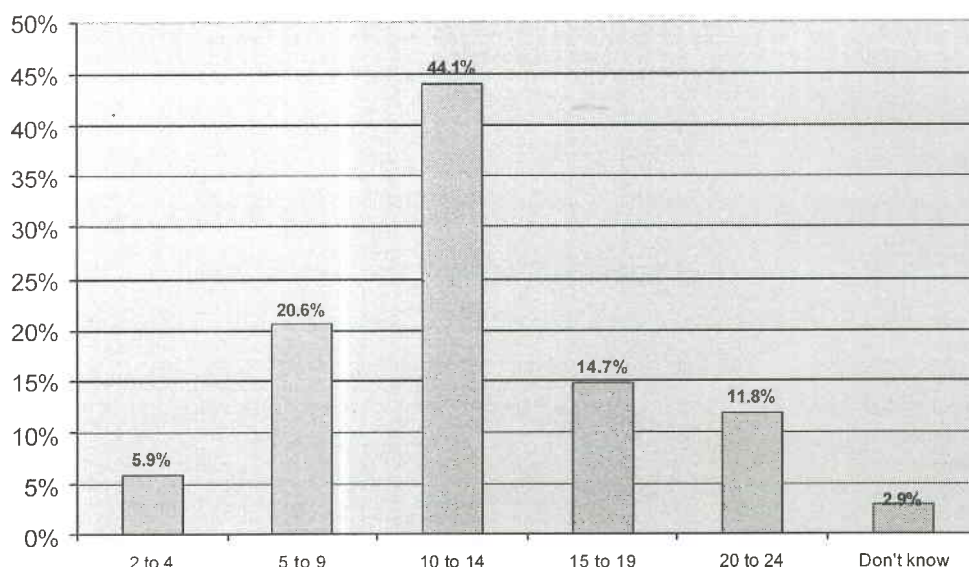
4.3.5 Democratic Governance

Governance of social economy organisations is an important issue. Aspects of this characteristic include:

- *Open membership*: 74% of respondents have open membership, whilst 6% did not know. The remaining 20% cited restrictions in relation to age (i.e. 16 – 25 year olds), geography, common bond and single identity.
- *Size of management committee*: management committee sizes range from 2 to 24; the average size is between 11 and 12 people.

⁷ Respondents could select more than one response; therefore the total of all responses exceeds 100%.

Size of management committee



- *Composition of management committee:* Not all organisations responded with regard to the composition of the management committee. The number of responses are included in the table below.

	Representation on management committee				
	Women	People with disability	Up to 26 yrs	55+yrs	Users
Total responses	22	21	18	17	13

- Of the 22 organisations which responded, more than half have management committees with between 1 and 50% women. However, one management committee is composed entirely of women, whilst 2 have no female representation.
- Over a third of the organisations which responded to this question have committees with no representation from people with disabilities. About half of those who responded (10 organisations) have between 1 and 25% of the committee in this category;
- Of 18 organisations which responded, over a third (7) have no young people on the management committee. Another third have management committees where up to a quarter are young people. One organisation's management committee consists entirely of young people;
- Almost all of the organisations which responded to this question have some older people on the management committee.
- Of most concern is the representation of users on management committees: less than half of the organisations surveyed responded to this question. Of these, almost a quarter have no user representation on the management committee. However, just under half of those responding have management committees which consist entirely of users.

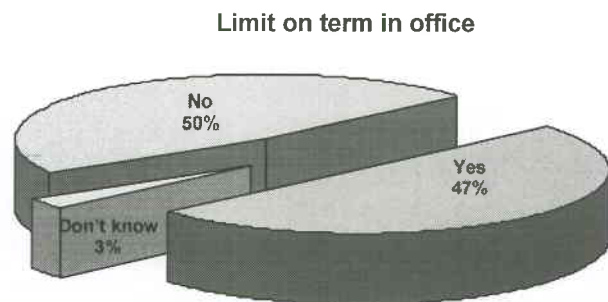
Proportion of

Representation on management committee

management committee	Women	People with disability	Up to 26 yrs	55+yrs	Users
0%	2	9	7	2	3
1% - 25%	4	10	8	2	3
26% - 50%	14	2	2	8	0
51% - 75%	0	0	0	2	1
76% - 99%	1	0	0	2	0
100%	1	0	1	1	6

- Process to join management committee. Most organisations mentioned nominations and elections as the standard process for joining the management committee: over half mentioned this in connection with the AGM, whilst over 10% referred to votes taken by the committee. Other organisations whilst not specifically mentioning the AGM or decision-making by the committee, referred to open membership, nominations and voting. In two cases, restrictions were mentioned: one referred to an invitation to join the committee, the other to restrictions on membership of the organisation (i.e. specific beneficiary group it caters for).

- Limits on term in office: Half of the organisations surveyed placed no limit on the length of time an individual could hold office (i.e. chair, treasurer, secretary, etc). However, just under half (47%) did have limits: of these, over 80% had limits ranging from 1 to 3 years.



- Turnover of management committee: over 40% of organisations were unable to describe how the management committee membership was refreshed. Of the remaining 60%, the turnover in management committee ranges from 10% (i.e. 1 in 10 new members each year) to 40% (4 in 10 new members each year). A further 12% of respondents indicated relatively little or no change as follows:

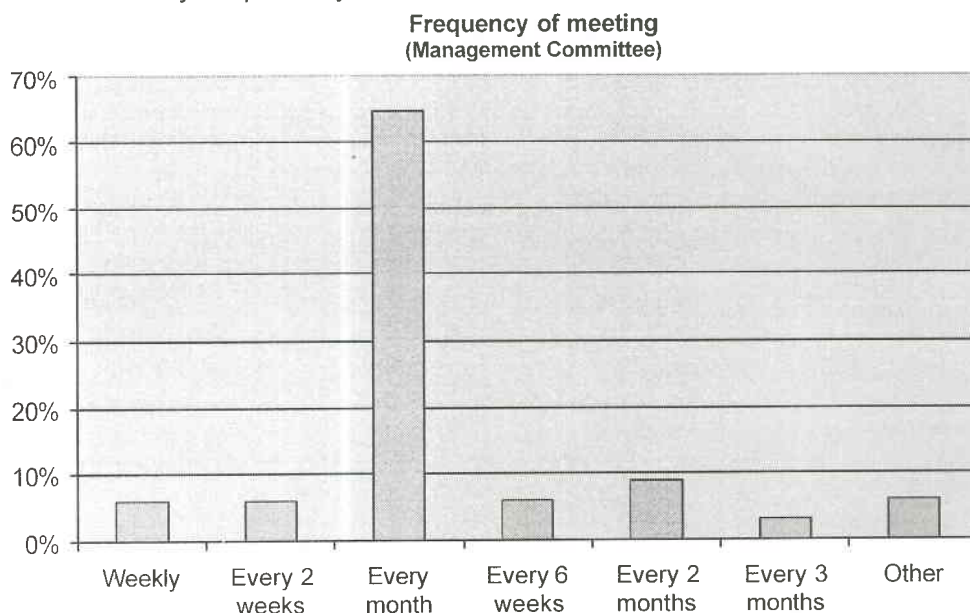
- Chairman changes every two years
- None since beginning
- Very rare occasions e.g. death
- 25% new in last 4 years

Change in management committee	%
10% (1 in 10)	26.5%
20% (1 in 5)	8.8%
30%	2.9%
33% (1 in 3)	2.9%
40%	5.9%
Don't Know	41.2%

Other

11.8%

- *Frequency of management committee meetings:* almost 65% of organisations meet on a monthly basis. Amongst the remainder, meeting frequency ranges from weekly to quarterly.



4.3.6 Accountable

Accountability to stakeholders is demonstrated in various ways including:

- *Holding an Annual General Meeting (AGM)*
 - 94% of organizations hold an AGM, (including one newly established organisation which had not held one yet but was planning to)
 - Of those organisations which held an AGM, over a third (35%) were attended by between 11 and 30 people; 42% were attended by more than 30 people.
 - 6% of organisations did not hold an AGM
- *Auditing and publishing annual accounts*
 - Over three quarters (76.5%) of organisations publish annual accounts;
 - Of those organisations which do publish annual accounts, 92% are audited by someone external to the organisation.
 - About a sixth of organisations (17.6%) did not publish annual accounts
- *Taking needs of users/beneficiaries into account:* all but two respondents mentioned ways in which they take user/beneficiary needs into account in running projects. These include a wide variety of approaches including direct consultation, research and promotional material:
 - Committee knowledge of community
 - Consultation with community representatives

- Focus groups
- Public meetings
- Planning groups
- Meetings with interested parties
- Requests for meetings from individuals
- Door to door consultation
- Drop in clinics
- Community audit/survey
- Customer satisfaction survey
- Community awareness projects
- Feasibility projects
- Feedback from projects
- Community newsletters
- Direct mail shots
- PR Activities/flyers

- *Keeping users/beneficiaries informed:* The most common ways to keep people informed are through the local press or word of mouth, or public meetings (about four out of five organisations use these). Newsletters and websites are also used by substantial numbers of organisations.

Keeping users (or beneficiaries) informed about your work	% ⁸
Local press	82.4%
Word of mouth	82.4%
Public meetings e.g. AGM	79.4%
Newsletter	64.7%
Website	52.9%
Other (annual report, noticeboard, members' meeting)	11.8%

4.3.7 Not-for-profit

Of the organisations surveyed, almost 40% stated that they had made a surplus in the last financial year; just over half had not made a surplus and the remainder did not know. Of those which did make a surplus, the table below illustrates how this was used. Reinvestment, loan repayment and dividends account for the majority of responses.

Use of surplus	%
Reinvested	46.2%
Service loans/Pay off loan and funders	15.4%
Dividend/loan interest rebate to members /Dividend to members	15.4%
Forthcoming events	7.7%
Living memorial centre (purchasing premises)	7.7%
Don't Know	7.7%

⁸ Respondents could select more than one response; therefore the total of all responses exceeds 100%.

4.3.8 Income Generating

Not all respondents provided information about their sources of income, but the information provided illustrates a high level of dependency on grant-aid. There were 24 responses in relation to income from grant aid and 16 in relation to income from contracts; half of the respondents (17) responded about income from fees/sales and fundraising.

- 17% have no income from grants; 21% derive all income from grants.
- Conversely, almost 30% derive no income from fees/sales but only 6% of those are entirely dependent on income from fees/sales.

Proportion of Income	Where the money comes from			
	Grants	Contracts	Fees/Sales	Fundraising
0%	16.7%	43.8%	29.4%	23.5%
1% - 25%	16.7%	25.0%	17.6%	17.6%
26% -50%	12.5%	12.5%	11.8%	17.6%
51% - 75%	16.7%	0.0%	5.9%	5.9%
76% - 99%	4.2%	0.0%	5.9%	5.9%
100%	20.8%	6.3%	17.6%	11.8%
Don't know	12.5%	12.5%	11.8%	17.6%

Other sources of income (contracts and fundraising) are exploited by some organisations: however, 23% have no income from fundraising and 44% have no income from contracts. Only 12% are entirely dependent on contracts and 17.6% are entirely dependent on fundraising.

4.4 SWOT of the social economy in Newry & Mourne

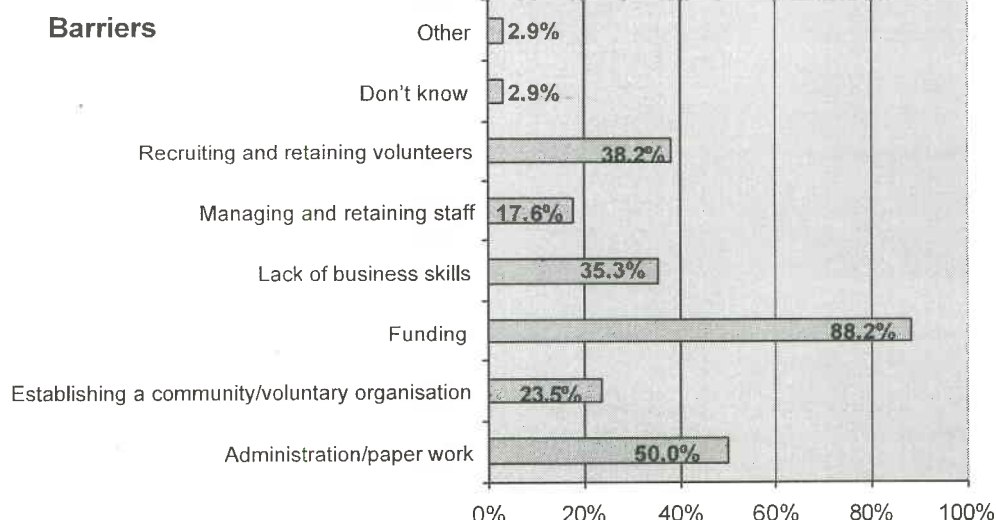
A SWOT analysis of the social economy sector is presented below. This summarises SWOT analyses undertaken at the workshops and reviewed by the Reference Group. It provides an overview of how the social economy sector is perceived in the District.

The Strengths and Weaknesses relate to internal issues to the sector; generally these can be addressed, whereas the Opportunities and Threats relate to external issues to the sector; generally, these are issues which can't be directly controlled but to which the sector must respond.

Strengths	Weaknesses
➤ Strong sector ➤ Community based/led ➤ Good leadership ➤ Good community spirit ➤ Good community infrastructure - most areas ➤ Local involvement ➤ Local knowledge ➤ Volunteer base and commitment ➤ Good committees ➤ Easily accessible ➤ High level of skills, expertise, talent within groups (Finance, Making funding applications, Management, Teaching) ➤ Good support agencies ➤ Easily accessed support ➤ Good access to information ➤ NMDC knowledge of funding – support ➤ Good ideas ➤ Provides local employment, training and sustainability ➤ Quality ➤ Reinvest back into the community (skills, money, time) ➤ Self help ➤ Social needs addressed ➤ Strong work ethic ➤ Valued services ➤ Variety of groups ➤ Well established ➤ Willingness to work with others ➤ Work well together	➤ Dependency on volunteers (e.g. 1-2 key people in organisation) - own personal time and volunteer burn out ➤ Apathy (people not interested) ➤ No 'strategic driver' In Newry & Mourne for social economy ➤ Council indifference: not pro-active enough ➤ Definition of social economy unclear ➤ Ideas for SE project – getting people involved ➤ Difficulty in application process ➤ Buildings / facilities / - lack of suitable premises – in need of upgrade or existing facilities (e.g. schools) closed in evenings ➤ Groups not allowed to develop at own pace ➤ Less able "left behind" ➤ ICT skills for children, middle aged, elderly ➤ Lack of affordable childcare ➤ No facilities for young children ➤ Lack of activities for teenage / youth sector ➤ Lack of cheap accessible services/activities for elderly ➤ Lack of communication between groups ➤ Lack of co-operation / understanding ➤ Lack of network ➤ Not enough training for groups ➤ No follow-through after training ➤ Some badly managed projects ➤ Some projects specifically for one group ➤ Too many reports/surveys not followed through ➤ Voluntary work not valued ➤ Work is seasonal

Opportunities	Threats
➤ LSP funding ➤ Funding for training ➤ Many small grants available ➤ Channel funding to support social economy ➤ Put value on services already provided to community ➤ Goodwill and capacity of groups ➤ Develop existing organisations ➤ Engage voluntary groups at all levels of decision making ➤ Personnel (committee, community) ➤ Develop local expertise ➤ Local trainers available ➤ Tourism potential/seasonal ➤ Rural areas a lot to offer ➤ Peace process – build on peace and reconciliation ➤ Young people staying locally ➤ High number of young people educated to third level ➤ Activities for children and young people ➤ Arts and crafts ➤ Improve quality of life for local people ➤ Need for computer suite (Crossmaglen)	➤ Reducing funding ➤ Sustainability ➤ Funders not valuing volunteers ➤ No ,or little, value on community services ➤ Apathy ➤ Sectarianism is holding things back ➤ Divided communities ➤ Poor community relations ➤ Application process cumbersome, scary ➤ Insurance (public liability) ➤ Red tape ➤ Somebody else gets there first e.g. private business offering competitive prices ➤ Security – vandalism ➤ Anti-social activities (increase money spent on policing, etc therefore less available for social economy) ➤ Lack of employment opportunities locally ➤ High social deprivation ➤ Social need increasing ➤ Decline in shops and industry (e.g. shops closing in Kilkeel, fishing industry) ➤ People move out of the district ➤ People relocated with problems and needs ➤ Poor public transport

To complement the SWOT analysis, consideration is also given to barriers identified in developing projects. Funding (88%) is clearly a significant issue. However, administration/paperwork (50%) was mentioned by half of all respondents and over a third also mentioned recruitment and retaining volunteers (38%) and lack of business skills as key **issues** (35%).



4.5 Developing the social economy

Specific plans for future development were cited by participants in the research. Respondents in the telephone survey were asked about ideas for commercially viable activity which addresses social need that could be developed; participants at the workshops were also invited to propose ideas for the development of the social economy. The ideas included the following:

- Transport (accessible, rural)
- Social housing: amenities for children, better safety, infrastructure
- Community crèche
- Activities for people with disabilities
- (Leisure) Activities & facilities for young people / teenagers e.g. indoor adventure play centre
- Environmental improvements / regeneration
- Rural tourism capitalising on local history and heritage
- Computer suite/IT
- Estate based housing management
- Hostel and café (Atticall)
- Community Arts Project
- Care for the elderly
- Respite care
- Community manufacturing business
- Management training and business development
- Community Business – crafts based
- Workspace
- Horticulture
- Space/premises for community activities including e.g. counselling, social enterprises, café, childcare, accommodation, charitable organisations
- Developing Warrenpoint Baths

4.6 Training and other support needs for the social economy

Organisations participating in the telephone surveyed were asked which organisations had provided them with support within the last year. Clearly the Enterprise Agency and network organisations have a significant supporting role to play. However, there are also a number of other organisations providing important support to the sector.

Providers of support (within the last year)	% ⁹
Newry & Mourne Enterprise Agency	52.9%
ROMAL (Regeneration of Mourne Area Limited)	41.2%
Confederation of Community Groups	29.4%
Newry City Centre Management Group	26.5%
Other	23.5%
ROSA (Regeneration of South Armagh)	20.6%
Newry & Mourne Local Strategy Partnership	17.6%
Invest Northern Ireland	14.7%
Training and Employment Agency	11.8%
Newry & Mourne District Council	5.9%
Newry & Mourne Chamber of Commerce	2.9%
Don't know	2.9%

Other support organisations included statutory bodies and funders as follows:

- Department of Education
- SELB.
- Victims Unit
- Ulster Scots Agency
- Newry & Mourne Health Trust
- NI Drug and Alcohol
- South Drug Alcohol team
- IFI community bridges
- Rank Foundation
- Esme Fairbairn Foundation
- CFNI
- Newhaven Trust
- Newry Tourism

Participants in the workshops and survey were asked about future training and support needs. These are ranked in the next table in order of popularity.

About two thirds of all those consulted considered that funding was a key

⁹ Respondents could select more than one response; therefore the total of all responses exceeds 100%.

need; this was supported by significant numbers highlighting the need for support in making funding applications. The high level of interest in funding issues highlights the level of dependence on grant aid: whilst some organisations are focusing on survival, only a small number see the potential to generate income and hence a pathway to sustainability.

Apart from funding, over a third of all telephone survey participants indicated a need for training and support in: Market Research, Strategic Planning, Partnership Working, Social Enterprise Business Planning, Project Planning, Networking with other Organisations, Premises, ICT and Community Development.

Networking with other Organisations and Strategic Planning were also mentioned by over 30% of workshop participants. None of the other types of training and support was mentioned by more than 30% of workshop respondents.

Training/Support	Survey	Workshops
Number of respondents	34	39
Funding	61.8%	66.7%
Market Research	44.1%	17.9%
Making Funding Applications	38.2%	53.8%
Strategic Planning	38.2%	30.8%
Partnership Working	38.2%	25.6%
Social Enterprise Business Planning	38.2%	25.6%
Project Planning	38.2%	25.6%
Networking with other Organisations	35.3%	33.3%
Premises	35.3%	28.2%
ICT	35.3%	23.1%
Community Development	35.3%	23.1%
Recruitment and Selection of Staff and/or Volunteers	29.4%	12.8%
Financial Management	29.4%	12.8%
Establishing a Community/Voluntary Organisation	29.4%	10.3%
Governance and Accountability	26.5%	0.0%
Creativity – Identifying Ideas	23.5%	28.2%
Managing Staff and/or Volunteers	23.5%	10.3%
Administration Systems	23.5%	10.3%
Presentation Skills	23.5%	7.7%
Performance Management	23.5%	2.6%
Sales and Marketing	20.6%	10.3%
Monitoring and Evaluation	17.6%	12.8%
Social Auditing	14.7%	17.9%

4.7 Summary

4.7.1 Size and Scale of Sector

The consultation supports the view that social economy enterprises are diverse in size, scale, location and activity. It highlights their contribution to the local economy in Newry & Mourne with regard to employment opportunities and service provision and funding.

Within the community and voluntary sector, the majority of organisations may be considered as undertaking solid community development activity. A small proportion of organisations (those identified for the survey) are part of the social economy sector within Newry & Mourne at present; within this sub-sector, these organisations are operating at different stages of development.

In the social economy continuum (illustrated below), the majority of organisations focus on building social capital; whilst a minority are in a position to generate some income and fall within the social enterprise category. However, even within the social enterprise, there is a continuum of development.



¹⁰ Drawing on databases held by ROMAL, ROSA and CCG and local knowledge (other known social economy organisations (e.g. credit unions, charity trading arms)), around 370 organisations were identified as part of the wider social economy continuum. Of these, over 60 were identified by the Reference Group as being towards the income generating/social enterprise end of the continuum. Almost 40 more similar organisations were subsequently identified as falling within this category: these mainly included regeneration organisations, playgroups, credit unions and charity trading arms. A full list is included in Appendix 4.

The three tiers (or categories) within the social economy are described below.

Where	What this means
Outside	Community and voluntary sector organisations not currently operating within the social economy; focused on social activity and do not recognise the potential of social economy as a route to sustainability. Do not wish to get involved in trading activity.
Developing	Community and voluntary sector organisations providing goods or services in exchange for payment or through a contract e.g. luncheon club. Recognise the need to generate income and effectively run micro-businesses but do not necessarily see themselves as such. Likely to have undertaken some training and developed some skills but lack relevant expertise in business planning, etc. Require practical support e.g. small grants for equipment, promotion.
Developed	Well established and developed social economy organisations with a good track record and clear understanding of their position. Need to share good practice and act as role models for developing organisations. Need to consider use of surpluses (reinvesting into community), social auditing, new ideas.

4.7.2 Gaps

There are no obvious gaps in terms of geographic areas. However, there is scope to develop social economy activity in sectors adversely affected by the conflict and division or experiencing structural adjustment as a result of peace (e.g. tourism, entrepreneurship, arts and sports). In addition, certain types of social economy enterprise may be absent from Newry & Mourne (see 4.3.2). These include employee owned businesses, intermediate labour market companies, housing associations, LETS, or social investment funds, none of which participated in the survey.

With regard to key beneficiary groups which address the needs of particular communities and groups economically or otherwise disadvantaged by the conflict, most are served by a significant proportion of the social economy organisations surveyed i.e.

- victims of the conflict (and their families) (50%)
- ex-prisoners (and their families) (32%)
- displaced persons (35%)
- former members of the security and ancillary services (27%).
- young people (91%), women (97%) and older workers (88% cater for older people)
- long term unemployed (74% cater for unemployed)

Beneficiary groups which address the needs of particular communities and groups economically or otherwise disadvantaged by the conflict are served by social economy organisations. However, there is scope for greater provision in proportion to the size of each beneficiary group

Projects, which will be funded by the LSP, will be taking advantage of the opportunities presented by peace. So, there is scope to focus new social

economy activity on particular groups to address the needs of particular communities and groups economically or otherwise disadvantaged by the conflict.

4.7.3 Strategic Issues

From the SWOT analysis and the wider consultation, it is apparent that there is a strong and active base within Newry & Mourne on which to develop further social economy projects. There are a large number of community and voluntary sector organisations which could take advantage of this base. A number of suggestions for new social economy projects have been made and specific unmet needs with regard to training and other support to develop these have been identified. In order to develop the sector, a proactive and focused approach is needed to address the issues highlighted. The following list of strategic issues has been distilled from the consultation:

Awareness and Understanding

- Lack of understanding of the concept of social economy (language, terminology and definitions), especially in relation to trading activities and how it is differentiated from general community sector activity
- Lack of understanding of social economy opportunities e.g. public sector procurement opportunities, income generation, trading etc
- Gaps in service delivery linked to social economy enterprise sectors and target groups
- Lack of breadth of social economy organisation types
- Lack of social economy ideas and good practice examples
- Lack of opportunities grasped in the target group sector
- Lack of use of ICT in social economy promotion

Skills, Knowledge and Performance

- Grant dependence of many organisations accompanied by a lack of skills and knowledge to initiate and develop trading activities associated with social economy organisations. This encompasses knowledge of how to develop income generating activities and lack of understanding as to why this is necessary.
- Lack of business and management skills associated with sector e.g. governance, social accounting and auditing, marketing, market research, income generating potential
- Performance improvement of existing social economy projects

Resources

- Lack of capital and revenue resources for social economy enterprises(both established and start-up)
- Lack of use of existing facilities (buildings, etc)

Leadership and networking

- Difficulty in taking the bold step of categorising organisations within the social economy sector and more importantly those that are not
- Lack of local social economy network and obvious lead organisation with specific role to provide support and promote a joined up approach among key agencies including Council, LSP, Invest NI, Enterprise Agencies
- Lack of sufficient good practice in relation to reinvestment of social economy surpluses in the area

Governance and participation

- Lack of support and recognition for volunteers within the social economy sector in Newry & Mourne
- User involvement could be improved in all social economy enterprises

5. Recommendations and Action Plan

A vision for the social economy has been produced with input from the Reference Group; it is underpinned by five underlying strategic aims. An Action Plan is also included, describing the interventions required to achieve the vision.

5.1 Vision

The vision for the social economy sector in Newry & Mourne is:

A strong, visible social economy sector in Newry & Mourne with both a social and an economic focus, promoting best practice, providing a clear pathway to sustainability through income generation and addressing social needs at a local level.

5.2 Strategic Aims

In order to achieve this vision, five strategic aims have been identified:

- To improve awareness, understanding and opportunities for growth of good practice organisations in the social economy sector in Newry & Mourne
- To improve practical skills, knowledge and performance of the social economy sector across the Newry & Mourne area
- To provide appropriate resources for new or developing social economy enterprises engaged in income generating activities
- To provide leadership and networking opportunities for those active in the social economy sector through an integrated approach by relevant agencies
- To improve governance, user participation and volunteer recognition amongst social economy organisations in Newry & Mourne

5.3 Rationale for Actions

Newry & Mourne Local Strategy Partnership's Social Economy Programme is not intended as a panacea for the community and voluntary sector in Newry & Mourne. Rather it is aimed at a very specific sub-sector, namely those organisations which are already clearly identifiable as part of the social economy (based on the characteristics defined and either meeting these fully or making clear progress towards being able to meet these fully) or those organisations which are outside the social economy but wish to become part of it. The focus is on moving organisations towards being less dependent on grant-aid, whilst recognising that grants still have a role to play in funding many of the organisations.

The budget available to develop the social economy in Newry & Mourne (£0.5m) will not be sufficient to provide all of the support that is required for all of the organisations in Newry & Mourne. It is recommended that the majority should be allocated to developing or developed organisations with the potential to grow and become good practice role models. The remaining (smaller) amount of funding

should be made available to support newer social economy organisations with a view to moving to these to generating 20- 30% of their income independently.

The Action Plan which has been developed takes account of the existing structure within the social economy sector in Newry & Mourne and also addresses the strategic issues highlighted in 4.7.3. This has been developed with reference to the Integrated Local Strategy, and the recent announcement of the establishment of a Social Economy Forum and Social Economy Network in Northern Ireland.

The Action Plan includes interventions under each of the strategic aims, indicative budget allocations for each of these and timescales. Phase 1 expenditure (which must account for a minimum of £350K) refers to interventions which should be actioned immediately; Phase 2 interventions should be actioned within 6-12 months. The rationale for interventions under each of the strategic aims is described below.

Aim 1 - Awareness and Understanding¹¹:

Clearly there is confusion and a lack of understanding of what the social economy is about and the benefits it can bring. Under this strategic aim, the interventions proposed are about increasing awareness and understanding through sharing good practice, building networks and raising awareness of opportunities. The interventions include:

- *Best practice visits*: representatives of organisations from Newry & Mourne (outside and within the social economy) visiting other social economy organisations in Northern Ireland, Republic of Ireland and in GB.
- *Interactive taster sessions* focusing on innovation and ideas generation: short focused sessions for Newry & Mourne organisations to hear from other key social entrepreneurs about what they have achieved and how this has been done. A useful organisation to link with would be Cat's Pyjama's¹²
- *Exchange visits*: targeted at developing and developed organisations, this intervention would allow specific groups to undertake a short exchange visit with another group perhaps operating in the same sector in Northern Ireland, Republic of Ireland or GB.
- *Placements with other Social Enterprises*: targeted at developing and developed organisations, this intervention would allow individuals from specific groups to undertake a short placement with another group perhaps operating in the same sector in Northern Ireland, Republic of Ireland or GB.
- *Video Conferences on best practice* (including international): these would provide scope to learn from international best practice and consider potential opportunities. The video conference facility would allow organisations from

¹¹ Consistent with Regulation (EC) No 1783/1999 on ERDF eligible expenditure - Article 2, para 1 (c) (ii) "financing the transfer of technology, including in particular the collection and dissemination of information" and Article 4, para 1 (c) "exchanges of experience"

¹² Seeks to support the development of social enterprises in the UK. Based in Liverpool, it runs events which combine practical and theoretical approaches, secondments and master classes (www.the-cats-pyjamas.com.)

Newry & Mourne to link with others from further afield including Europe and USA.

- *Themed seminars* on best practice social economy interventions and opportunities. One example might be to bring together potential beneficiaries and public sector funders (e.g. projects addressing unemployment and DEL); another could be franchising. These focused events would be about going beyond ideas and linking into specific funding opportunities. The local network would have a role to play in instigating these and lobbying appropriate public sector agencies for example in considering how best their services might be delivered through social economy organisations.

Aim 2 - Skills, Knowledge and Performance¹³

It is important to recognise that social economy organisations have a unique set of skills which differ from those required by community organisations or small businesses. The interventions proposed here focus on the establishment of Social Economy Support Service which would undertake local delivery of a number of initiatives with the ultimate goal of producing social enterprise business plans for participating organisations:

- *Training Needs Analysis: The recommendation is to employ local networks* e.g. ROSA, ROMAL and CCG to identify appropriate organisations operating or intending to operate within the social economy and undertake a 'health check' with them to identify gaps in skills and knowledge.
- *Training in Social Accounting and Auditing:* Unique to social enterprises are the need for social accounting and auditing and the concept of the triple bottom line (financial, social, and environmental). It is imperative that organisations operating in the social economy are equipped with the skills to undertake this.
- *Social Economy programme:* this comprehensive and practical programme would run for up to 15 local organisations and would encompass a range of areas including:
 - Introducing and defining the social economy
 - Identifying the need and ideas generation
 - Market research and marketing
 - Governance and accountability
 - Finance
 - Social Enterprise Business Planning

Given the issues of volunteer burn-out and potential barriers to undertaking more 'training', this programme will have to be proactively sold to potential participants. The benefits of the programme should be highlighted: namely skills acquisition and practical tangible outputs. Having completed the programme, not only would participants be equipped with the skills and

¹³ Consistent with Regulation (EC) No 1783/1999 on ERDF eligible expenditure - Article 2, para 1 (c) (i) "assistance for services for enterprises, in particular in the fields of management, market studies and research and services common to several enterprises"

knowledge to produce a social enterprise business plan, but such a plan will have been produced for each participating organisation.

Aim 3- Resources¹⁴

Under this strategic aim, it is intended to ensure that the sector is adequately resourced through the provision of small grants, of up to £10K.

- *Small capital grants:* the focus of these grants is to provide hard capital investment e.g. equipment
- *Small revenue grants:* the focus of these grants is to assist social economy organisations to undertake activities such as marketing and promotion, feasibility study, etc.

In order to ensure that these grants are effectively used, it is recommended that grants and skills development are linked i.e. in order to receive an award, applicant organisations must undertake as a minimum, the training on social auditing, supporting and recognising volunteers and governance awareness.

Aim 4 - Leadership and networking¹⁵

Linked to the issues of lack of awareness and understanding of the social economy in Newry & Mourne is the lack of a structured local network providing strategic direction for the sector. It is recommended that a local social economy network is established with links to the NI wide network¹⁶.

In Newry & Mourne, this cross-sectoral partnership could take over the role of the dormant Socio-Economic Forum. Membership would include Newry & Mourne LSP, Newry & Mourne Enterprise Agency, Newry & Mourne District Council (Economic Development), Invest Northern Ireland, Chamber of Commerce, Further Education College and any other interested parties. The network would have a co-ordinating role organising the activities described under Aim 1 - Awareness and Understanding. It would also have a role to play in creating and maintaining a database of social economy organisations in Newry & Mourne, lobbying for funding, and commissioning research into pertinent issues.

Aim 5 - Governance and participation¹⁷

¹⁴ Consistent with Regulation (EC) No 1783/1999 on ERDF eligible expenditure - Article 2, para 1 (c) (iii) "improvement of access by enterprises to finance and loans" and para 1 (c) (iv) "direct aid to investment"

¹⁵ Consistent with Regulation (EC) No 1783/1999 on ERDF eligible expenditure - Article 2, para 1 (c) (ii) "financing the transfer of technology...common organisation between enterprises and research establishments"

¹⁶ At NICVA's social economy conference in January 2003, Ian Pearson, MP (Minister for Enterprise, Trade and Investment) announced a substantial funding package (£4 million over 4 years) from a consortium of DETI, DSD and IFI to enable the Social Economy Agency to take forward a comprehensive programme of work. This will deliver:

- establishment of an inclusive Social Economy Network
- promotion of the Network, and the benefits of social enterprises, throughout Northern Ireland, but particularly in areas of under investment and economic deprivation
- identification and better understanding of social enterprise policy issues;
- a research capability to assess and identify new opportunities for increased social enterprise activity in both private and public services;
- promotion of beneficial partnership arrangements between the Northern Ireland Network and similar organisations in GB, ROI and mainland Europe;
- a dedicated social enterprise resource centre/website

¹⁷ Consistent with Regulation (EC) No 1783/1999 on ERDF eligible expenditure - Article 2, para 1 (c) (ii) "financing the transfer of technology, including in particular the collection and dissemination of information"

This strategic aim recognises three of the key characteristics of social economy organisations: local ownership and participation, democratic governance and accountability, and the importance of volunteers.

- *Governance awareness*: this is recommended to ensure that social economy organisations are aware of statutory and legal requirement and well informed about legal structures for social economy organisations. Roles and responsibilities should also be explored.
- *Best practice guide and training on supporting and recognising volunteers*: this intervention addresses issues of volunteer burn-out and refreshing membership and participation. In conjunction with the Volunteer Development Agency, a good practice guide for volunteers in social economy organisations in Newry & Mourne should be produced and made available in hard copy and electronic format. Training on supporting and recognising volunteers should also be offered to social economy organisations.

No.	Strategic Aim	Indicative Allocation	Intervention	Target Groups	Timescale	Indicators	Output	Outcome
1	Awareness To improve awareness, understanding and opportunities for growth of good practice organisations in the social economy sector in Newry & Mourne	£60K	Best practice visits	All	Phase 1-2	No of visits	1 visit pa	Raised awareness of - social enterprise in practice - best practice - opportunities for growth Networking
			Interactive taster sessions focusing on ideas generation	All	Phase 1-2	No of sessions	2 sessions pa	Ideas identified for social economy enterprises
			Exchange visits	Developing Developed	Phase 1-2	No of exchanges	10 exchanges/ 3 years	Exchanged ideas on best practice Networking
			Placements with other Social Enterprises	Developing Developed	Phase 1-2	No of placements	10 placements/ 3 years	Increased knowledge of - social enterprise in practice - best practice - opportunities for growth Networking
			Video Conferences on best practice (including international)	All	Phase 1-2	No of video conferences	2 video conferences pa	Raised awareness of - best practice - opportunities for growth Networking
			Themed seminars on best practice social economy interventions and opportunities	All	Phase 1-2	No of seminars	4 seminars pa	Identified opportunities for social enterprises (gap in market) and potential financing

No.	Strategic Aim	Indicative Allocation	Intervention	Target Groups	Timescale	Indicators	Output	Outcome
2	Skills, Knowledge and Performance To improve skills, knowledge and performance of the social economy sector across the Newry & Mourne area	£200K	Establishment of Social Economy Support Service to deliver locally:	All	Phase 1	No of organisations assessed	Up to 100 Health Checks	Training needs and supports identified to enable organisations to develop within the social economy
			a) Training Needs Analysis					
			b) Training in Social Accounting and Auditing	Developing Developed	Phase 1	No of organisations trained	Up to 100 organisations trained	Knowledge of, and ability to apply, social accounting and auditing
			c) Social Economy programme for up to 15 local organisations encompassing: - Introducing and defining the social economy - Identifying the need and ideas generation - Market research and marketing - Governance and accountability - Finance - Social Enterprise Business Planning	Developing Developed	Phase 1	No of organisations participating No of social enterprise business plans produced	15 participating organisations 15 social enterprise business plans	Increased knowledge of social economy and capacity to produce a social enterprise business plan
3	Resources To provide appropriate resources for new or developing social economy enterprises engaged in income generating activities	£200K	Small capital grants (e.g. equipment)	Developing Developed	Phase 1	No of grants awarded	Up to 20 grants awarded	Social enterprises adequately resourced
			Small revenue grants (e.g. marketing, promotion, feasibility study)	Developing Developed	Phase 1	No of grants awarded	Up to 20 grants awarded	Social enterprises adequately resourced

No.	Strategic Aim	Indicative Allocation	Intervention	Target Groups	Timescale	Indicators	Output	Outcome
4	Networking To provide leadership and networking opportunities for those active in the social economy sector through an integrated approach by relevant agencies	£15K	Establish think-tank, a local social economy network, linked to NI wide network including Enterprise Agency, Invest Northern Ireland, Economic Development (Council), LSP.	All	Phase 1	Network established No of meetings	4 network meetings pa	Raised profile of social economy in Newry & Mourne Clear leadership and direction for sector provided Integrated approach to development of sector
5	Governance and participation To improve governance, user participation and volunteer recognition amongst social economy organisations in Newry & Mourne	£25K	Governance awareness for all supported social economy organisations Best practice guide and training on supporting and recognising volunteers within the social economy (with support from VDA)	Developing Developed	Phase 1	No of organisations trained Guide produced No of organisations trained	Up to 100 organisations trained Guide produced Up to 100 organisations trained	Best practice governance procedures implemented in trained organisations Raised awareness of good practice in volunteering More volunteers recruited and retained within the social economy sectors

5.4 Application Process

As part of the application process for funding under the social economy programme, it is recommended that a simple pro-forma with tick-boxes is produced so that there is a straightforward process to ensure that applicants are genuinely part of the social economy or striving to be so.

This should be based on the six defining characteristics of the social economy in Newry & Mourne. Questions could be drawn from the telephone survey questionnaire (or a modified version of these, based on the responses provided) as illustrated below.

➤ Social Objectives

- What kind of social need is addressed (Q10)
- What goods and services provided (Q11)
- Profile of users/beneficiaries (Q23)

➤ Local Ownership and Participation

- Geographic area served (Q4)
- Number of volunteers (Q6)
- Number of members (Q12)
- Number of users (Q22)

➤ Democratic Governance

- Open membership (Q13)
- Size of management committee (Q14)
- Composition of management committee (Q15)
- Process to join management committee (Q16)
- Limits on term in office (Q17)
- Turnover of management committee (Q18)
- Frequency of management committee meetings (Q19)

➤ Accountable

- Hold an Annual General Meeting (Q20, Q21)
- Auditing and publishing annual accounts (Q26, Q27)
- How user needs are taken into account (Q24)
- How users are kept informed (Q25)

➤ Not-for-profit

- Use of surplus (Q30)

➤ Income Generating

- Level of income (Q28)
- Income sources (grant, contract, fees/sales, fundraising) (Q29)

5.5 Monitoring and Evaluation

Having agreed the Action Plan, the LSP should ensure that appropriate monitoring and evaluation processes are established to track progress against

actions and review effectiveness and efficiency, using the indicators, outcomes and outputs defined in the Action Plan.

5.6 Impact on New TSN

New Targeting Social Need (TSN) is about the way the Government, its Departments and public bodies approach some of the most important problems in society, including some which are specific to Northern Ireland. The initiative aims to target resources and effort to benefit those who are most in need, including:

- individuals, who are unemployed or disadvantaged or who find it difficult to play a full role in society;
- groups, which may suffer particular types of disadvantage, such as Travellers or people with disabilities;
- disadvantaged areas with high levels of unemployment, poverty and poor environmental conditions.

Within the New TSN Initiative, there are three main elements:

- Addressing the problems of unemployment and increasing employability
- Targeting other sorts of social need, for example health, housing and education
- Promoting Social Inclusion which aims to identify and tackle factors which cause social exclusion

Recommended interventions in the social economy programme include training to develop business and management skills of groups to engage them in undertaking economically based activities or projects. They should therefore be better placed to develop (new or existing) social economy projects (for which some funding is available) and thus create employment opportunities. In this way, the issues of unemployment and increasing employability will be addressed.

The social economy programme should address other aspects of social need and promote social inclusion through targeting interventions on areas, groups or individuals experiencing disadvantage. These would include:

- areas disadvantaged by the conflict (e.g. sectarian interface areas; areas isolated by border closure; areas with high concentration of displaced persons; areas where social and economic development has been inhibited; disadvantaged areas that not attractive to inward investors and areas suffering the effects of physical dereliction)
- areas identified as suffering from disadvantage as defined by Noble et al, including specific wards:
 - Daisy Hill
 - Ballybot
 - Crossmaglen
 - St Patrick's
 - Creggan

- Derrymore
- Drumgullion
- Camlough
- St Mary's
- Newtownhamilton.

- Groups which focus on women, young people or for instance victims of the conflict and their families or ex-prisoners and their families.

Appendix 1 – Participants in the Research

Reference Group members

Community Forum
Confederation of Community Groups
Invest Northern Ireland
Kilkeel Development Association
Newry & Mourne Cooperative and Enterprise Agency
Newry & Mourne District Council
Newry & Mourne LSP
ROMAL
ROSA

Workshop participants

3 Ways Community Association
Adopt
Altnaveigh House
Atticall Youth Band
Atticall Community Association
Crossmaglen Community Association
Drake Music Project N.I
Dromintee Residents Group
Kilkeel Community Association
Kilkeel Playgroup
Lisnacree Community Association
McGrath Centre & Newry Story Tellers Group
Mourne Youth Community Association
Newry & District Council of Trade Unions
Newry Women's Aid
Newry & Mourne District Council
Newry & Mourne Health & Social Services Trust
Rostrevor & District Community Association
SELB Youth Service
Silverbridge / Daly Park Residents Group
South Armagh Rural Women's Network
Tullydonnell Community Association
U3A Crossmaglen Branch
U3A Newry City
Women and Family Health Initiative
Windmill Playgroup

Telephone survey participants

Altnaveigh House
Annalong Community Development Association
Ballymartin Community Association
Bessbrook Development Group
Burren Community Association
Burren Community Forum
Clonduff Development Association
Cnocnafeola Centre
Confederation of Community Groups
Crossmaglen Credit Union
Derrybeg Community Association
Donaghmore Heritage Association
FAIR
Greater Linenhall Community Association
Kilkeel Development Association
MAGNET Centre
Mourne Stimulus
Newry & Mourne Enterprise Agency and Co-op
Newry City Centre Management Partnership Ltd
Newry Drugs and Alcohol Abuse
Newtownhamilton Regeneration Partnership
REACT
River Valley Development Assoc Ltd
ROMAL (Regeneration of Mourne Area Limited)
ROSA (Regeneration of South Armagh)
Rostrevor Women's Group
Saver
Schomberg Society
South Armagh Farmers Enterprise (SAFE)
Ti Chulainn
Warrenpoint Area Regeneration Group
Warrenpoint Community Partnership
Warrenpoint, Burren and Rostrevor Credit Union
Whitegate

Appendix 2 – Telephone Survey

	Date	Time	Response	Questionnaire Number
1	June 2003	am/pm	Y/N	<i>Data Entry use only</i>
2	June 2003	am/pm	Y/N	
3	June 2003	am/pm	Y/N	

Introduction

Good morning/afternoon I am calling from Venture on behalf of Newry & Mourne Local Strategy Partnership. As part of the LSP's research into the social economy, we are consulting with community and voluntary sector organisations in the Newry & Mourne District.

The research will contribute to an Action Plan which is being developed to guide future investment in the social economy. It is important that the plan takes account of your organisation's needs.

Would you have a few minutes to answer some questions about your organisation? All answers will be treated in the strictest confidence.

Check that respondent is able to answer questions about the organisation e.g. legal status, income, number of staff/volunteers, management, training needs, future plans. If not, get an alternative contact name

Please can you confirm the following information:

Name	_____	V1
Position	_____	V2
Organisation	_____	V3
Telephone	_____	V4

Organisation Details

Q1 How long has your organisation been in existence? ***Tick one***

Less than a year ☐

1 to 2 years ☐

3 to 5 years ☐

6 to 10 years ☐

Don't Know ☐

Other ☐

V5

If Other, please specify _____

V6

Q2 What is the legal status of your organisation? *Tick one*Community group with a constitution ☐Company limited by guarantee ☐Company limited by share ☐Co-operative ☐Industrial and Provident Society ☐Don't Know ☐Other ☐

V7

If Other, please specify _____ V8

Q3 Which of the following terms would you use to describe your organisation? *Tick all that apply*Not-for-profit ☐ V9Voluntary sector ☐ V10Community enterprise ☐ V11Trading arm of a charity ☐ V12Social business ☐ V13Partnership ☐ V14Development Trust ☐ V15Private Company ☐ V16Social Firm ☐ V17Don't Know ☐ V18Other ☐ V19

If Other, please specify _____ V20

Q4 Which geographic area does your organisation serve? *Tick all that apply*

- | | | |
|-------------|--------------------------|-----|
| Annalong | ☐ | V21 |
| Bessbrook | ☐ | V22 |
| Cloughreagh | ☐ | V23 |
| Crossmaglen | ☐ | V24 |
| Kilkeel | ☐ | V25 |
| Newry | ☐ | V26 |
| Rostrevor | ☐ | V27 |
| Warrenpoint | ☐ | V28 |
| Don't know | ☐ | V29 |
| Other | ☐ | V30 |

If Other, please specify _____ V31

Q5 How many staff does your organisation employ? *Tick one full time, one part time*

- | Full time | Part time |
|-------------------------------------|-------------------------------------|
| 0 ☐ | 0 ☐ |
| 1 ☐ | 1 ☐ |
| 2 ☐ | 2 ☐ |
| 3 ☐ | 3 ☐ |
| 4 ☐ | 4 ☐ |
| 5 ☐ | 5 ☐ |
| Don't Know ☐ | Don't know ☐ |
| Other ☐ V32 | Other ☐ V34 |

If Other, please specify _____ V33 If Other, please specify _____ V35

Q6 How many volunteers does your organisation have? *Tick one*

- | | | |
|------------|--------------------------|-----|
| Up to 10 | ☐ | |
| 11 to 20 | ☐ | |
| 21 to 30 | ☐ | |
| 31 to 40 | ☐ | |
| Don't Know | ☐ | |
| Other | ☐ | V36 |

If Other, please specify _____ V37

Q7 Regarding the premises that your organisation uses, do you ...? **Tick one**

Own these premises ☐

Rent these premises ☐

Not have access to premises ☐

V38

Q7b If Own, please specify size/extent _____ V39

Q8 Does your organisation own any vehicles? **Tick one**

Yes ☐

No ☐

Don't Know ☐

V40

Q8b If Yes, please specify _____ V41

Q9 Does your organisation own any workspace? **Tick one**

Yes ☐

No ☐

Don't Know ☐

V42

Q9b If Yes, please specify area _____ sq metres V43

Social Objectives

Q10 What sort of social need does your organisation address? **Tick all that apply**

Environmental ☐

V44

Health ☐

V45

Housing ☐

V46

Unemployment ☐

V47

Welfare ☐

V48

Don't Know ☐

V49

Other ☐

V50

If Other, please specify _____ V51

Q11 What goods or services does your organisation provide? *Tick all that apply*

Advocacy/Campaigning	☐	V52
Arts and Cultural Activities	☐	V53
Childcare	☐	V54
Domiciliary Care	☐	V55
Financial Services	☐	V56
Housing	☐	V57
Information and Advice	☐	V58
Resource Centre	☐	V59
Social Activities	☐	V60
Training	☐	V61
Workspace	☐	V62
Don't Know	☐	V63
Other	☐	V64
If Other, please specify		V65

Local Ownership/Democratic Governance**Q12** How many members does your organisation have? *Tick one*

Less than 10	☐	
11 to 30	☐	
31 to 50	☐	
51 to 100	☐	
More than 100	☐	
Don't know	☐	V66
If more than 100, please provide an estimate		V67

Q13 Is membership of your organisation open to anyone?

Yes	☐	
No	☐	
Don't know	☐	V68
If no, what restrictions are there? (e.g. geography, age etc)		V69

Q22 How many people use goods/services that your organisation provides? **Tick one**

- | | | |
|---------------------------------|--------------------------|-----|
| Less than 10 | ☐ | |
| 11 to 20 | ☐ | |
| 21 to 30 | ☐ | |
| 31 to 40 | ☐ | |
| 41 to 60 | ☐ | |
| Don't Know | ☐ | |
| More than 60 | ☐ | V87 |
| If more than 60, please specify | <input type="text"/> | V88 |

Q23 Which of the following describes the people who use goods/services that your organisation provides? **Tick all that apply**

- | | | |
|---|--------------------------|------|
| Women | ☐ | V89 |
| People with a disability | ☐ | V90 |
| Children | ☐ | V91 |
| Young people | ☐ | V92 |
| Older people | ☐ | V93 |
| Victims of the conflict (and their families) | ☐ | V94 |
| Ex-prisoners (and their families) | ☐ | V95 |
| Unemployed | ☐ | V96 |
| Displaced persons | ☐ | V97 |
| Former members of security and ancillary services | ☐ | V98 |
| Travellers | ☐ | V99 |
| Don't Know | ☐ | V100 |
| Other | ☐ | V101 |
| If Other, please specify | <input type="text"/> | V102 |

Notes for interviewer:

Victims of the conflict: the surviving injured and/or disabled – either physically or psychologically – of violent, conflict-related incidents and those who care for or are related to them, along with close relatives who mourn their dead.

Ex-prisoners and their families, qualifying prisoners who were or would have been released under the terms of the Good Friday Agreement.

Displaced persons those who have involuntarily moved from areas of violence or from interface areas, and communities in which there is a concentration of such displaced persons.

Q24 How does your organisation take the needs of users (or beneficiaries) into account in planning and developing projects? Please briefly describe any ways in which you find out from them about their needs.

V103

Q25 How does your organisation keep users (or beneficiaries) informed about the work that you do? ***Tick all that apply***

Local press	☐	V104
Newsletter	☐	V105
Public meetings e.g. AGM	☐	V106
Website	☐	V107
Word of mouth	☐	V108
Don't know	☐	V109
Other	☐	V110
If other, please specify		V111

Accountability/Non-Profit Taking

Q26 Does your organisation publish annual accounts?

Yes	☐	
No	☐	
Don't Know	☐	V112
If Yes, provide date of last accounts	Month	Year

V113

Q27 Are the annual accounts audited by someone external to the organisation?

Yes	☐	
No	☐	
Don't Know	☐	V114

Q28 In the last financial year, what was your organisation's income? *Tick one*

Less than £1000	☐
£1,000 - £4,999	☐
£5,000 - £9,999	☐
£10,000 - £14,999	☐
£15,000 - £24,999	☐
£25,000 - £49,999	☐
£50,000 - £99,999	☐
£100,000- £149,999	☐
£150,000 or more	☐
Don't know	☐

V115

Q29 In the last financial year, what proportion of the organisation's income came from...

	Grants?	Contracts?	Fees/Sales?	Fundraising?
0%	☐	☐	☐	☐
25%	☐	☐	☐	☐
50%	☐	☐	☐	☐
75%	☐	☐	☐	☐
100%	☐	☐	☐	☐
Don't know	☐	☐	☐	☐
Other	☐ V116	☐ V118	☐ V120	☐ V122

If other, specify _____ V117 _____ V119 _____ V121 _____ V123

Q30 In the last financial year, did your organisation make a surplus? *Tick one*

Yes	☐
No	☐
Don't Know	☐

V124

If Yes, how was it used? _____ V125

Providers of Support/Barriers

Q31 Which of the following organisations provided support to you in the last year? **Tick all that apply**

Confederation of Community Groups	☐	V126
Invest Northern Ireland	☐	V127
Newry City Centre Management Group	☐	V128
Newry & Mourne Chamber of Commerce	☐	V129
Newry & Mourne District Council	☐	V130
Newry & Mourne Enterprise Agency	☐	V131
Newry & Mourne Local Strategy Partnership	☐	V132
ROMAL (Regeneration of Mourne Area Limited)	☐	V133
ROSA (Regeneration of South Armagh)	☐	V134
Training and Employment Agency	☐	V135
Don't know	☐	V136
Other	☐	V137
If Other, please specify		V138

Q32 What would you say are the main barriers to developing projects such as those which your organisation runs? **Tick all that apply**

Administration/paper work	☐	V139
Establishing a community/voluntary organisation	☐	V140
Funding	☐	V141
Lack of business skills	☐	V142
Managing and retaining staff	☐	V143
Recruiting and retaining volunteers	☐	V144
Don't know	☐	V145
Other	☐	V146
If Other, please specify		

The Future

- Q33** Finally, can I ask you to think about the longer term sustainability of your organisation. Does your organisation have any ideas for commercially viable activity which addresses social need that it could develop? Please describe briefly.

V147

If response to Q33 is None, then close, otherwise ask Q34

- Q34** What training or other support would you need to develop the project you have just described? ***Tick all that apply***
- | | | |
|--|--------------------------|------|
| Funding | ☐ | V148 |
| ICT | ☐ | V149 |
| Premises | ☐ | V150 |
| Networking with other Organisations | ☐ | V151 |
| Partnership Working | ☐ | V152 |
| Community Development | ☐ | V153 |
| Establishing a Community/Voluntary Organisation | ☐ | V154 |
| Governance and Accountability | ☐ | V155 |
| Making Funding Applications | ☐ | V156 |
| Presentation Skills | ☐ | V157 |
| Creativity – Identifying Ideas | ☐ | V158 |
| Market Research | ☐ | V159 |
| Strategic Planning | ☐ | V160 |
| Business Planning | ☐ | V161 |
| Project Planning | ☐ | V162 |
| Recruitment and Selection of Staff and/or Volunteers | ☐ | V163 |
| Managing Staff and/or Volunteers | ☐ | V164 |
| Sales and Marketing | ☐ | V165 |
| Performance Management | ☐ | V166 |
| Financial Management | ☐ | V167 |
| Administration Systems | ☐ | V168 |
| Monitoring and Evaluation | ☐ | V169 |
| Social Auditing | ☐ | V170 |
| Don't know | ☐ | V171 |
| Other | ☐ | V172 |
| If Other, please specify | <input type="text"/> | V173 |

Thank you very much for your time

Appendix 3 – The Social Economy Defined

'Social Economy organisations:

- have a social, community or ethical purpose
- adopt an explicit, market-based business model, and
- have a legal form appropriate to a not-for-personal-profit status.'

The Social Economy in Northern Ireland, A Policy Review, Colin Stutt et al, June 2001 (commissioned by DETI)

'the sum of all organised, democratically-based activities aimed at primarily at addressing concerns within the community... They have three common characteristics:

- Enterprise focused
- Explicit social aims
- Local Ownership'

Social Economy Structures, Social Economy Agency

'social enterprises are businesses with primarily social objectives (i.e. engaged in some form of trading, but the trade supports a social purpose). These enterprises aim to generate surpluses, which are principally reinvested in the business or in the community, rather than being driven by the need to maximise profit for shareholders and owners.'

Department of Trade and Industry: Social Enterprise – A Strategy for Success, July 2002

'that part of the economy between the private and public sectors, which engages in economic activity in order to meet social objectives'

Partnership 2000 Social Economy Working Group (RoI, July 1998)

'the continuum of possibilities ranging from supply totally protected by public subsidies to totally competitive supply'

EU White Paper on Growth, Competitiveness and Employment (1994)

'The social economy is a broad concept covering a wide range of social economy enterprises varying from large scale sustainable and professional 'not for profit' businesses to smaller scale community based services. It provides an important bridge between disadvantaged communities and the mainstream economy by developing capacity at local level in terms of participation, skills development, regeneration activity and job creation. It is built upon the concept of social capital, which is the basic building block for regenerating communities. It does this not in isolation from indigenous community and business development opportunities, but in association with them.'

EU Programme For Peace And Reconciliation In Northern Ireland and the Border Counties Of Ireland 2000–2004 Programme Complement (Measure 3.1 Rationale)

'Six defining characteristics fundamental to social enterprise:

- ⇒ having a *social purpose or purposes*
- ⇒ achieving the social purposes by, at least in part, *engaging in trade* in the marketplace
- ⇒ *not distributing profits* to individuals
- ⇒ holding assets and wealth *in trust for community benefit*
- ⇒ *democratically* involving members of its constituency in the governance of the organisation
- ⇒ being independent organisations accountable to a defined constituency and to the wider community'

Social Enterprise in Anytown, John Pearce, February 2003

Describing mutuality as 'an ancient way of getting things done' and social enterprises demonstrating:

- ⇒ 'working for the benefit of the community
- ⇒ seeking genuine participation of local people
- ⇒ aiming to earn an income or at the very least to cover costs.'

The Mutual State How local communities can run public services, A NEF Pocketbook, Ed Mayo and Henrietta Moore, 2001

Appendix 4 – The Social Economy in Newry & Mourne

Drawing on databases held by ROMAL, ROSA and CCG and local knowledge (other known social economy organisations (e.g. credit unions, charity trading arms)), around 370 organisations were identified as part of the wider social economy continuum.

Of these, over 60 were identified by the Reference Group as being towards the income generating/social enterprise end of the continuum. Almost 40 more similar organisations were subsequently identified as falling within this category: these mainly included regeneration organisations, playgroups, credit unions and charity trading arms.

These 96 organisations are listed by geographical area (Newry City, South Armagh, South Down).

Newry City		
1	Altnaveigh House Cultural Society Ltd	Newry
2	Confederation of Community Groups	Newry
3	Derrybeg Community Assn	Newry
4	Dominican Playgroup	Newry
5	Dromalane/Fathom Development Partnership	Newry
6	Greater Linen Hall Area Community Association	Newry
7	Happy Days Playgroup	Newry
8	Magnet Young Adult Centre	Newry
9	Nai-Scoil an Iuir	Newry
10	Newhaven Trust	Newry
11	Newry & Mourne Arts Collective	Newry
12	Newry & Mourne Co-op & Enterprise Agency	Newry
13	Newry & Mourne Drugs & Alcohol Partnership	Newry
14	Newry & Mourne Travellers Partnership	Newry
15	Newry Adolescent Partnership	Newry
16	Newry City Centre Management Partnership	Newry
17	Newry Credit Union	Newry
18	Newry Hospice Shop	Newry
19	Rascals 'n' Ruffians	Newry
20	Regeneration of Ballyholland Area	Newry
21	See-Saw Playgroup	Newry
22	St John Bosco	Newry
23	St Vincent de Paul – Newry	Newry
24	Whitegate	Newry
25	Windmill Playgroup	Newry

South Armagh		
1	Andy Pandy Playgroup	Mullaghbawn
2	Ashburton/Culloville Cross-Border Development Group	Crossmaglen
3	Belleek Community Regeneration Group	Belleeks
4	Bessbrook Credit Union	Bessbrook
5	Bessbrook Development Group	Bessbrook
6	Cosy Corner Playgroup	Crossmaglen
7	Crossmaglen & District Development Company	Crossmaglen
8	Crossmaglen & District Playcare	Crossmaglen
9	Crossmaglen Credit Union	Crossmaglen
10	Cullaville & District Development Association	Cullaville
11	Cullyhanna Community Enterprises	Cullyhanna
12	Dromintee & Jonesborough Playgroup	Dromintee
13	FAIR	Markethill ¹⁸
14	Forkhill & District Development Association	Forkhill
15	Forkhill Playgroup	Forkhill
16	JADE	Jonesborough
17	Little People Playgroup	Newtownhamilton
18	Meigh Community Playgroup	Meigh
19	Nai-Scoil an Creggan	Silverbridge
20	Newtownhamilton Credit Union	Newtownhamilton
21	Newtownhamilton Regeneration Partnership	Newtownhamilton
22	Regeneration of Camlough Group	Camlough
23	Ring of Gullion Tourism Ltd.	Mullaghbawn
24	ROSA	Crossmaglen
25	Saver	Markethill ¹⁸
26	Silverbridge Community Development Forum	Silverbridge
27	Silverbridge Community Res Centre	Silverbridge
28	Slieve Gullion Courtyard Development Group	Killeavy
29	Slieve Gullion Credit Union	Forkhill
30	South Armagh Farmers Enterprise (SAFE)	Camlough
31	Southern group enterprises	Crossmaglen
32	Ti Chulainn Cultural Centre	Mullaghbawn

¹⁸ Although this organisation is not based in the Newry and Mourne District Council area many of its beneficiaries are.

South Down

1	Annalong Community Development Association	Annalong
2	Attical Community Assn	Atticall
3	Attical Playgroup/Afterschool Group	Atticall
4	Ballymartin Community Assn	Ballymartin
5	Blues on the Bay Festival	Warrenpoint
6	Burren Community Assn	Burren
7	Burren Community Forum	Burren
8	Busy Bees Playgroup	Burren
9	Carlingford Lough Shore & Landowners Association	Rostrevor
10	Clonduff Development Association	Hilltown
11	Clonduff Preschool Playgroup	Hilltown
12	Cnocnafeola Centre	Atticall
13	Donaghmore Heritage Association	Newry
14	Dunaman Children's Centre	Kilkeel
15	Fiddler's Green Festival Committee	Rostrevor
16	Glenn & Barr Playgroup	Jerrettspass
17	Glenn Community Development Association	Glenn
18	Hilltown Community Assn	Hilltown
19	Hilltown Credit Union	Hilltown
20	JIMS	Kilkeel
21	Jolly Tots Playgroup	Mayobridge
22	Kilbroney Development Group	Rostrevor
23	Kilkeel Credit Union	Kilkeel
24	Kilkeel Development Association	Kilkeel
25	Kilkeel Playgroup	Kilkeel
26	Kingdom Playgroup	Kilkeel
27	Lower Mourne Playgroup	Kilkeel
28	Mayobridge Community Development Association	Mayobridge
29	Mayobridge Regeneration Partnership	Mayobridge
30	Mourne Stimulus - South Down	Kilkeel
31	Puzzles Playgroup	Warrenpoint
32	REACT	Kilkeel
33	River Valley Development Assoc Ltd	Kilkeel
34	ROMAL	Warrenpoint
35	Rostrevor Women's Group	Rostrevor
36	Schomberg Society	Kilkeel
37	Warrenpoint Area Regeneration Group	Warrenpoint
38	Warrenpoint Community Partnership	Warrenpoint
39	Warrenpoint, Burren and Rostrevor Credit Union	Warrenpoint

TRADELINKS CLIENT FEES STATEMENT TO END FEBRUARY 2008

AGENCY Castlereagh Enterprises Ltd

Client Fee Transactions to date

01/09/2005	2004/CEL/10328/ENI	Interior Integrated Systems Ltd.	FIN	ACT	£200.00
01/09/2005	2005/CEL/10408/ENI	BRS Systems	FIN	ACT	£200.00
23/11/2005	2005/CEL/10503/ENI	Amethyst Business Solutions	FIN	ACT	£200.00
02/10/2006	2006/CEL/11016/ENI	Defence Sense	FIN	ACT	£200.00
02/10/2006	2006/CEL/11017/ENI	Origin Partners	FIN	ACT	£200.00
02/10/2006	2006/CEL/11017/ENI	Origin Partners	FIN	ACT	-£200.00
					£800.00

Invoices Raised to Date

	NET	VAT	TOTAL
31/10/2005 ENI	£400.00	£0.00	£400.00 paid 9/11/05
25/05/2006 ENI	£200.00	£35.00	£235.00 paid 4/10/06
30/11/2006 ENI	£400.00	£70.00	£470.00 o/s
07/09/2007 ENI	-£200.00	-£35.00	-£235.00 o/s
	£800.00	£70.00	£870.00

Remaining Balance to be invoiced

£0.00

Payments Received to Date

£635.00

Balance Outstanding

£235.00