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**HIE Moray**



## **Moray Social Enterprise - Social Economy Survey**

REAP has been commissioned by HIE Moray to carry out a mapping exercise to identify the support and development needs of social economy organisations within Moray. This research follows on from work which was carried out last year by HISEZ on behalf of the Moray Social Economy Partnership.

It would be appreciated if you could take the time to complete this questionnaire and return to REAP by post or e-mail. At a later date a number of organisations will be selected to a follow up interview for which a participation fee of £100 is payable.

1) Name of Organisation:

2) Main Contact:

3) Address:

4) Post Code

5) Phone:

6) e-mail:

7) website:

**Legal Structure**

8) Which of the following best describe your organisational status.  
(if more than one, tick all which apply)

- Unincorporated voluntary group
- Charity
- Company Ltd by Guarantee
- Company Ltd by Shares
- Co-operative
- Community Interest Company
- Social Enterprise
- Social Firm
- Other ----- Please Specify

9) Are you a membership organisation?                      Yes                      No

10) If yes, how many members do you have?

11) How many people currently serve as directors/trustees of your organisation?

- Less than 3
- 3-5
- 6-8
- more than 8

12) Please describe your core business

13) Please describe the social benefits that arise from your activities

14) How many staff do you currently employ?

- Full-Time:
- Part-time:
- Sessional:

15) How many volunteers are involved in your service delivery?

- Full-Time:
- Part-time:
- Sessional:

## Capacity

16) What is your annual turnover? £

17) How much does your organisation have access to as unrestricted financial reserves?

Enough for one months trading  
Enough for 1-3 months trading

Enough for more than 3 months trading

18) What percentage of your income comes from;

Grants	
Membership fees	
Retail	
Investments	
Service Level Agreements	

Training	
Consultancy	
Other - please specify	

19) Over the next 12 months do you anticipate that your level of trading income will;

Drop  
Remain the same

Increase by less than 20%  
Increase by more than 20%

20) Have you used loans to develop trading activities in the past 3 years?

Yes

No

21) Have you used an overdraft facility to develop trading activities in the past 3 years?

Yes

No

22) Are you considering using loan finance over the next 3 years?

Yes

No

23) Are you considering using an overdraft facility to develop trading activities in the next 3 years?

Yes

No

24) Do you own any buildings or assets?

Yes

No

25) If yes, what is the current estimated value of these assets?

26) If you own property, how would you describe the condition of that property?

Poor

fair

good

excellent

**Support Needs**

REAP are currently looking into the potential for a Social Enterprise Centre of Excellence in Moray. This "one-stop shop" would provide training and support to social enterprises, office space and a centralised backroom service.

27) In order to test out the support needs of the sector could you indicate the current availability of support available to you in Moray and any comments on how things could be improved.

<b>Help with</b>	Poor	Fair	Good	How support could be improved
Business Planning				
Financial Planning				
Winning Contracts				
Product Development				
Pricing				
Leadership Training				
Board Training				
Legal Advice				
HR Advice				
Backroom services – payroll, accounting etc				

28) Do you have any other support/training needs? (continue overleaf if required)

29) Would you be available for a follow up interview? **Yes** **No**

**Thank you for completing this questionnaire.**

## Information from Semi Structured Follow -up Interviews

### The Enterprise

How do you define yourself as an organisation?	
What legal structure do you operate under?	
What is your core business?	
What is your annual turnover?	

### Assets

Do you own assets?	
How do you manage those assets on a day to day basis?	
How would you describe the condition of those assets	
Have the assets been valued?	
Have you used your assets to draw down capital?	
If no, do you intend to?	

## Trade

Do you trade with other Social Enterprises	
What percentage of your turnover is trading/grants/SLAs?	
What do you trade?	
Would you like to increase the amount of trading you do?	
What does procurement mean to you?	

## Future Plans

Do you envisage your earned income to increase over the next 5 years?	
If you were doing a SWOT analysis of your enterprise just now what would it look like	

## Employment / Volunteers

Do you employ people? How many? Are their posts sustainable?	
Are your employees beneficiaries?	
How many volunteers do you have?	
What are your pay differentials?	

### Support Needs

How do you analyse organisational training needs	
Have you received support to establish and develop?	
Where from?	
Was it good?	
Was their support needed that you couldn't find or access?	
What are your current support needs?	
What do you see as your biggest challenge?	
Do you have training/support needs as a leader?	
Does your Board have leadership and development training needs?	
How do you measure your impact and demonstrate the difference your organisation is making.	

### Loan finance and banking

Have you ever accessed loan finance	
Who do you bank with? Why?	

**Governance and Succession Planning**

How stable is your org?	
How reliant is it on individuals?	
Does your board / management group have the capacity to help you grow.	

**Centre of Excellence**

Views on a Centre of Excellence - is there a need	
How could it help you?	

**Any other comments**

<b>Organisation Name</b>
Aberdeen & NE Deaf Society
Aberlour Childcare Trust
Advocacy North East
Age Concern
Alzheimers
Ark Housing
Alzheimer Scotland
Crossroads
Care Solutions
Community First (Moray)
Community Integrated Care
Cornerstone
Couple Counselling
Crossroads
Desk Top Publishing
Direct Payments Caledonia
Elgin and District Cancer Support Group
Enable
Family Mediation Grampian
Grampian Living Options
Grampian Society for the Blind
Hanover Housing
Huntingtons
Keith Caring Service
TEAM
Moray Anchor Project
Moray Carers Project
Moray CAB
Moray Council on Addiction
Moray Reachout
Moray Women's Aid
NCH
Nicholson Arts Ltd
Out of the Darkness Theatre Company
Inspire
Quarriers
Rape and Abuse Line
Richmond Fellowship Scotland
SAMH
Shamanic Studios
Shopmobility Moray
Speyside Dial-a-Bus
Turning Point Scotland
Victim Support Scotland
Who Cares? (Scotland)
WRVS: Meals on Wheels
Elgin Samaritans - CHOOSE LIFE
Healthy Living Centre - CHOOSE LIFE
Moray BPD Support (Empowerment Group) - CHOOSE LIFE
Moray Carers Group - CHOOSE LIFE
Positive Action Group - CHOOSE LIFE
Anderson's Care Home (not included in total as invoiced separately)
<b>Total £6.95m</b>



6) Does your organisation plan to generate more income from trading activity in the future?

Yes

Go to Q7

No

Go to Q9

7) Which, if any, of the following would you like assistance with?

Ideas Generation	<input type="checkbox"/>	Funding Finance	<input type="checkbox"/>
Legal Structure	<input type="checkbox"/>	Staffing/Volunteers	<input type="checkbox"/>
Technical/product development	<input type="checkbox"/>	Marketing	<input type="checkbox"/>
Market Research	<input type="checkbox"/>	Study Visits	<input type="checkbox"/>
Procurement	<input type="checkbox"/>	Other/please state .....	<input type="checkbox"/>

8) Would you like HISEZ to contact you with a view to providing tailored support and training?

Yes

No

9) Thank you for taking the time to complete this form.

Help and support regarding trading as a social enterprise is available from:  
 HISEZ CIC, Office 26-29 Queensgate Business Centre, 1 Fraser Street, Inverness, IV1 1DW  
 t: 01463 715533  
 e: [info@socialfirms.org.uk](mailto:info@socialfirms.org.uk),  
 w: [www.hisez.co.uk](http://www.hisez.co.uk)

If there is anything else you would like to add please use the space below:

## **Bibliography**

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