Report

January 2015

State of the Sector Report 2013

A study into the activities of Scottish Third Sector re-use and recycling organisations

Contents

Inspiring change for Scotland’s resource economy

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1 Executive Summary

The Scottish resource management sector comprises of work being carried out by local authorities, the private sector and the Third Sector. Understanding how the Third Sector contributes to the wider objectives of the Scottish zero waste agenda[1] is important. There are over 160 Third Sector re-use and recycling organisations in Scotland that are actively delivering aspects of the zero waste agenda.

Third Sector re-use and recycling organisations, for the purposes of this report, are defined as charitable community based organisations that are distinct from the public sector, private sector and traditional high street charity shops. They all deliver a range of social, economic and environmental benefits.

The State of the Sector Survey 2013 set out to capture and report on the activities and the outputs of these organisations. A web-based survey was designed and sent out via Survey Monkey to 168 organisations in November 2013.

A total of 113 organisations responded to this survey which equated to a 67% response rate. For the purposes of this report activity was defined in four different areas: re-use, recycling, composting and education activity.

This 2013 survey follows up on a similar survey[2], conducted in 2011, by Zero Waste Scotland.

1.1 Key findings and conclusions

- **Third Sector re-use and recycling activity was reported across all 32 local authority areas. The greatest concentration of activity reported was in Edinburgh and Glasgow with 18 organisations reporting activities in those two areas.**

  Third Sector organisations are active right across Scotland and anchored to the communities in which they operate meaning they are well placed to engage with all parts of their communities, including the difficult to reach audiences.

- **The Third Sector diverts in excess of 46,000 tonnes per year from landfill. Recycling tonnage is the largest proportion of that figure at 31,575 tonnes (68%) followed by re-use tonnage at 13,695 tonnes (29%) and community composting at 427 tonnes (1%).**

  By diverting over 46,000 tonnes of re-usable materials Third Sector organisations contribute significantly to Scotland's repair, re-use and recycling economy. The tonnages associated with this sector also make a significant environmental contribution towards reducing use of landfill, and cutting carbon emissions.

  In tonnage terms recycling is the most significant landfill diversion activity of the Third Sector . However, there were a greater number of re-use projects reported (83) than recycling projects (33).

  Community composting, in tonnage terms, is not a significant waste management activity. The returns suggest that there are only two active community composting projects delivering significant levels of tonnage in Scotland.

[1] 'Safeguarding Scotland's Resources: Blueprint for a More Resource Efficient and Circular Economy.' The Scottish Government. 2013.
[2] 'State of the Sector 2011: A study into the activities of the Scottish Third Sector Re-use & Recycling Organisations. ' Zero Waste Scotland. 2011.

- **Third Sector re-use and recycling activity generates in excess of £24 million turnover per year with 64% of gross income reported as earned income.**

  Third Sector organisations generate significant levels of earned income. The Third Sector is becoming more socially enterprising as access to grant funding becomes more challenging.

  Generally Third Sector organisations are actively engaged in re-use and recycling as a conduit to support their overall charitable aims. Their objectives enable them to explore materials that are difficult to recycle or re-use. The survey found that many are adapting, becoming more innovative, looking at new materials and markets, and working in partnerships to deliver their activities in a more enterprising way.

- **15 organisations reported that they had experience in winning public sector contracts to deliver re-use and recycling activities with 41 organisations reporting they had not considered tendering at all. 23 organisations reported that they currently had at least one service level agreement in place to provide re-use and recycling services.**

  Tendering and winning public sector contracts is a big challenge for Third Sector organisations. A significant number of organisations reported that they hadn't considered tendering for contracts and this indicates that more work is required to support the Third Sector in this area.

- **Third Sector re-use and recycling organisations reported employing 685 full-time equivalent staff, involved 3,448 volunteers and supported 682 training placements annually. Twelve organisations employed over 50% of the total staff numbers reported and 75 organisations reported having five or fewer full-time equivalent staff.**

  Third Sector organisations collectively support significant levels of volunteers and training placements.

  Third Sector organisations have traditionally relied on the support of local volunteers and placements to deliver their services. Without this support a number of organisations would struggle.

- **36 Third Sector re-use and recycling organisations reported that they delivered waste education and awareness projects with the public. There was reported contact with a total of 27,654 adults and 37,438 children.**

  Third Sector organisations undertake a range of education and awareness activities with the Scottish public.

  More work is required to formally evaluate the effects of these waste education programmes on the waste and recycling behaviour of the Scottish public.

2 Glossary

AD	Anaerobic Digestion (AD) is an industrial composting process that breaks down organic matter in the absence of oxygen
Aquaponics	A food production system that combines raising aquatic animals (aquaculture) with growing plants in water (hydroponics)
Circular Economy	An economy that is, by design or intention, restorative and in which material flows are of two types, biological nutrients, designed to re-enter the biosphere safely, and technical nutrients, which are designed to circulate at high quality without entering the biosphere.
CRO	Community re-use organisation
CRNS	Community Resources Network Scotland
FRN	Furniture Re-use Network, the UK network for furniture re-use organisations
FRO	Furniture re-use organisation
HWRC	Household Waste Recycling Centre
ISO 9001	International standard that defines an effective quality assurance system for manufacturing and service industries
LA	Local authority
LHO	Local housing organisation
PAS100	The UK composting industry standard that defines the specifications and standards for the entire composting process.
Resource Management	A term that encompasses repair, re-use, recycling and waste management activity
Revolve	Scotland’s accredited repair and re-use programme
SEN	Social enterprise network
SEPA	Scottish Environmental Protection Agency
Starter Pack	A pack of small household items that is provided to people moving out of homelessness
VCAP	Volunteer & Community Advocate Programme
Vermiculture	A composting process that uses worms to breakdown the organic matter
WEEE	Waste electrical and electronic equipment
WRAP	Waste & Resources Action Programme

2.1 Acknowledgements

The authors would like to thank all of the community re-use organisations that responded to the survey that forms the basis of this report

2.2 Disclaimer[3]

[3] Although every effort is taken to ensure the accuracy of the information contained within these pages we cannot guarantee that the content will always be current, accurate or complete. Zero Waste Scotland (hereafter referred to as 'we') shall not be liable for any loss or damage arising in contract, tort or otherwise from the use of this information or from any action or decision taken as a result of using such information. We reserve the right to remove, vary or amend any of the information at any

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3 Introduction

This chapter first explains what we mean by the Third Sector, and the role of CRNS, Zero Waste Scotland, and the Revolve accreditation programme. It then gives a brief overview of the methodology employed in gathering information for the current report, and the extent to which comparisons should and should not be drawn with the earlier 2011 State of the Sector Report.

3.1 Third Sector Overview

For the purpose of this report, Third Sector re-use and recycling organisations are defined as:

‘Non-profit distributing organisations in Scotland that apply commercial strategies to maximise social and environmental benefits. In general, they provide services to local communities through re-use, recycling, composting and waste education activities.’

Re-use organisations take in household and office items and prepare them for re-use before selling them or passing them on. Recycling organisations collect and collate materials from households and businesses so they can be processed and remanufactured into new products. Community compost organisations collect and process green waste or food waste, turning it into compost material. Waste education projects work with schools, the public, and businesses to promote recycling and waste minimization and effect positive behaviour change.

Many of these Third Sector organisations exist to benefit disadvantaged people in their local communities through the provision of affordable re-used goods or the creation of employment, training and volunteering opportunities. Some of these Third Sector organisations have more explicit environmental aims with their activities contributing to the wider green agenda and climate change programmes.

The Third Sector organisations in this survey are distinct from the more traditional national high street charities such as Oxfam, British Heart Foundation, and Cancer Research. This distinction is important as these national charities have different objectives and governance systems. The organisations in this survey apply commercial strategies to maximise social and environmental benefits. They are all not-for-profit organisations with charitable aims. For data on National Charitable organisations please refer to the Charity Retail Association.[4]

Scotland has a rich and diverse Third Sector. The State of the Sector Survey 2013 is an attempt to quantify and measure Third Sector activities and to better inform future policies and programmes aimed at supporting these organisations.

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[4] Charity Retail Association: www.charityretail.org.uk

3.2 Community Resources Network Scotland

The Community Resources Network Scotland (CRNS)[5] is a membership organisation that, in 2013, has 120 members that are active repair, re-use and recycling Third Sector organisations across Scotland. For over 10 years CRNS has existed to build a stronger repair, re-use and recycling Third Sector by supporting and representing the membership by delivering a number of resource management support programmes.

3.3 The aims of this study

The survey and subsequent analysis aims to:

- Give a comprehensive picture of current levels of activity in the sector in Scotland
- Give a comprehensive view of the nature of the organisations delivering this activity.
- Provide this data in a way that can be used to inform future policies and programmes.
- Provide the data in such a way that future work of a similar nature will be able to track changes over time.

Although there is significant overlap with CRNS members, the Revolve programme, and work supported by Zero Waste Scotland, this is a survey of the sector as a whole, not of the work or impacts of these national organisations or initiatives.

3.4 2011 Survey

In 2011 Zero Waste Scotland commissioned the CRNS to undertake a study looking at the whole sector, including those organisations out-with the CRNS. The 2011 survey received responses from 92 organisations. The 2011 ZWS State of the Sector Report[6] was the first to be undertaken on this scale with Scotland's Third Sector, and reflecting on the process, as well as current priorities, means some changes were made in the survey for this current study. However, in broad terms the State of the Sector Survey 2013 has been designed to complement the previous 2011 survey and covers the same themes and questions.

3.5 Methodology

The target population for this survey was identified from a number of sources: the CRNS membership database, the 2011 survey, previous CRNS mapping studies, the More Than Furniture website, the Revolve programme and Zero Waste Scotland. All 168 organisation identified in this way were contacted to take part in the survey.

Survey Monkey software was used to host the survey, which was sent to organisations on the 18th November 2013 with a three week response period. Reminder emails were sent on the 25th November and the 2nd December 2013. The CRNS then proceeded to follow up non-responses by

[5] Community Resources Network Scotland: www.crns.org.uk
[6] 'State of the Sector 2011: A study into the activities of the Scottish Third Sector Re-use & Recycling Organisations. ' Zero Waste Scotland. 2011.

telephone. Although an email survey in design, CRNS staff were available on the telephone to assist organisations to complete the survey if they were unsure of what was required.

In total 113 organisations responded (a 67% response rate). There has been no extrapolation of data from organisations that did not respond to the survey questionnaire (nor for non-responses in the context of a specific question). Although various ways to estimate the data that is “missing” in this regard have been considered, the diversity of the sector precludes modelling the non-responses, and has been rejected in this current study (as it was in 2011).

The authors are confident that the survey covers the majority of Third Sector activities and that the range of organisations responding is typical of the sector as a whole. There was a focus on ensuring the larger and more significant Third Sector organisations responded to the survey.

As in 2011, some Revolve organisation data was added to the response set separately. Organisations involved with Revolve provide an amount of project data via quarterly data surveys. Rather than ask them for much of the same information again, these organisations were able to opt out of sections of this survey, with their existing information from Revolve being used instead. This was more systematic than the 2011 approach as more consistent Revolve data has been gathered over a longer time span prior to this study.

The survey records what the organisations told us. Especially in terms of recording tonnages, some will have better systems than others in terms of accuracy and comprehensiveness, and there is no single consistent approach across the sector. Nonetheless data quality in many organisations has improved in recent years, and we are confident that for the vast majority tonnages reported are broadly accurate.

3.6 Survey format and defining activity

This State of the Sector Survey 2013 was broken down into different sections: The first section is for data on the whole organisation including finances and staffing information. It also asked the organisations to report on the breakdown of non re-use and recycling activities. The rest of the survey then splits into activity sections;

- Re-use
- Recycling
- Composting
- Education & Awareness

It was acknowledged that for some organisations these activities were not mutually exclusive and it was a challenge to get accurate data for an individual activity type when an organisation may deliver a number of projects and services concurrently.

All data was supplied to the best of the organisations knowledge and if there was a data query the authors attempted to clarify that with the organisation concerned with a follow up conversation.

4 Organisations Activity Overview

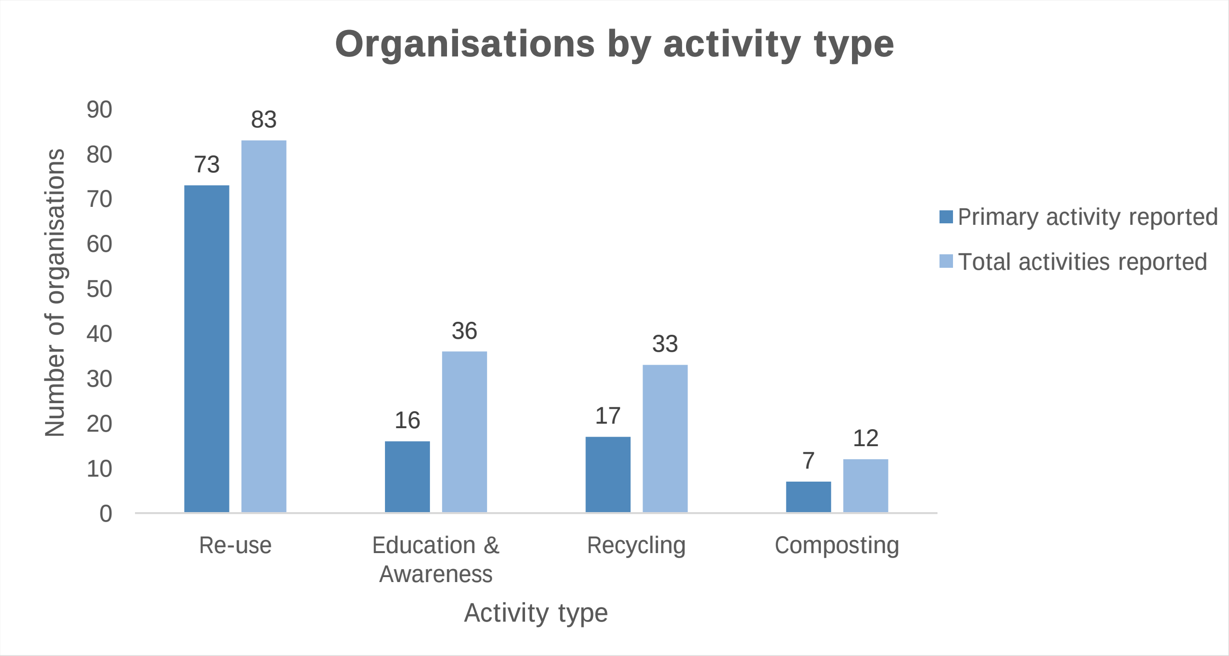
In total 113 organisations reported on their activities as a whole, though not all of the questions were mandatory or applicable to all organisations. Where appropriate the number of actual responses is given for each individual question.

4.1 Organisations by activity type

Figure 4.0 shows an analysis of the 113 responses by activity type (re-use, recycling, composting and education).

Re-use was by far the most common activity type with a total of 83 organisations reporting they did some form of re-use activity and 73 organisations reporting it as their primary activity. Community composting was the least common activity with 12 organisations reporting some form of practical community composting activity and seven organisations reporting it as their primary activity.

Figure 4.0 Organisations by activity type (based on 113 responses).



4.2 Organisations by total tonnage

Organisations reported tonnage figures for the different activities they undertook. Figure 4.1 shows a breakdown of these annual tonnage figures by activity type (re-use, recycling, composting and disposal).

Figure 4.1 indicates that recycling tonnage was the largest figure at a reported 31,575 tonnes (68%) in total, followed by re-use tonnage at 13,695 tonnes (29%). Compost tonnage accounted for 427 tonnes (1%).

Figure 4.1 Sector activity by tonnage figures (based on 113 responses).

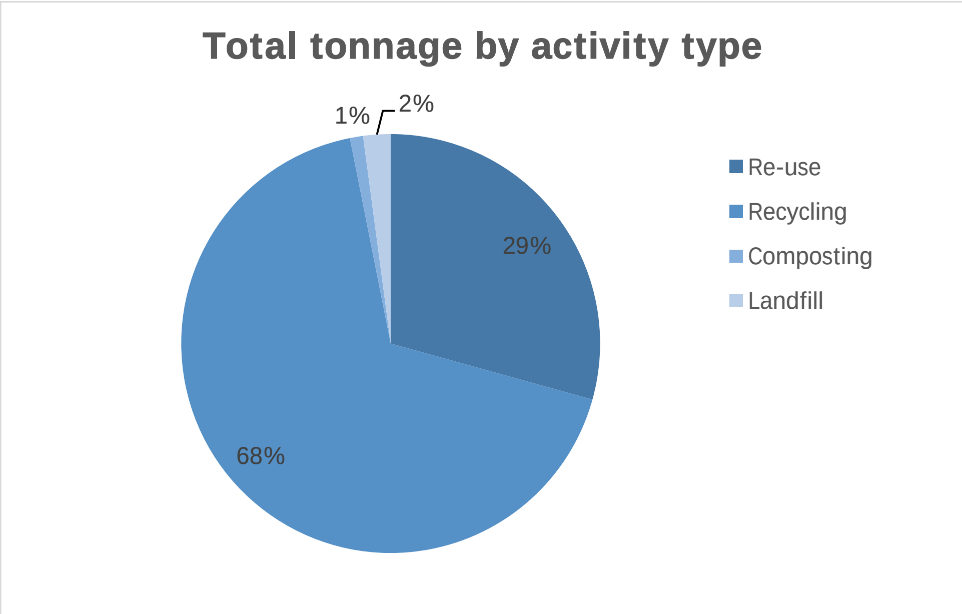
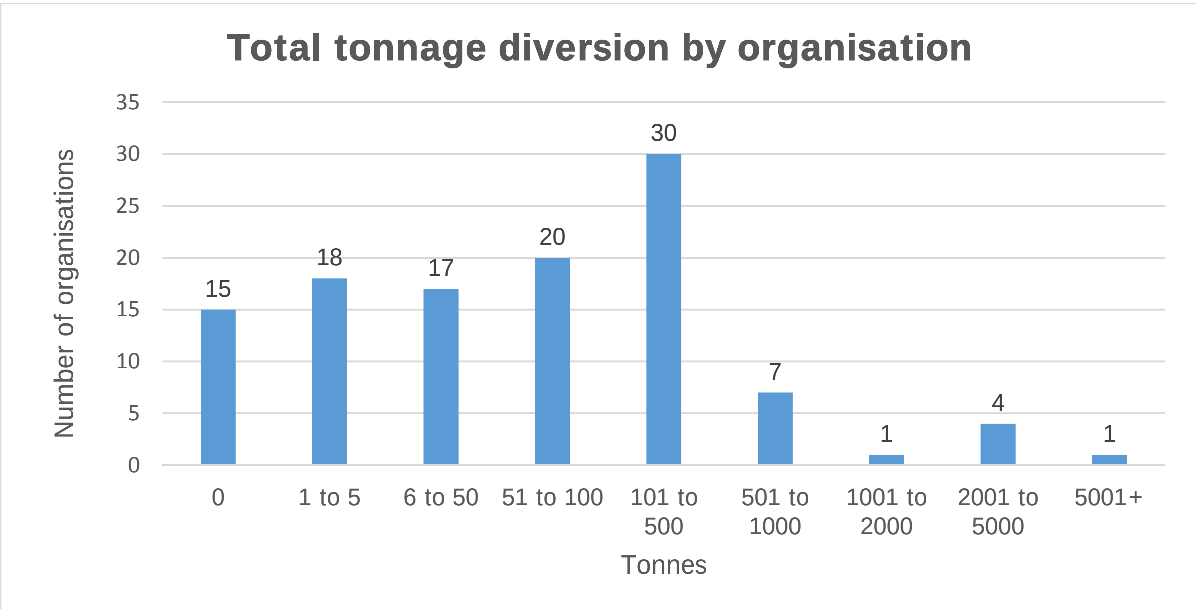


Figure 4.2 is a bar graph of the surveyed organisations grouped by various tonnage values. Diversion figures for re-use, recycling and composting were collated into a single tonnage figure.

Figure 4.2 Tonnage breakdown by organisation (based on 113 responses).



The tonnages give a clear indication of the wide range of operational sizes of organisation, when assessed on tonnage alone. The mean tonnage is 415 tonnes diverted from landfill per organisation, while the median is just 62 tonnes diverted from landfill per organisation. Six organisations reported in excess of 1,000 tonnes diverted from landfill, while 49 organisations reported less than 50 tonnes diverted from landfill.

15 organisations reported no tonnage diversion at all. These can be further sub-divided into organisations that do waste education & awareness work only (12 organisations) and organisations that had suspended their resource management activities at the time of the survey (three organisations).

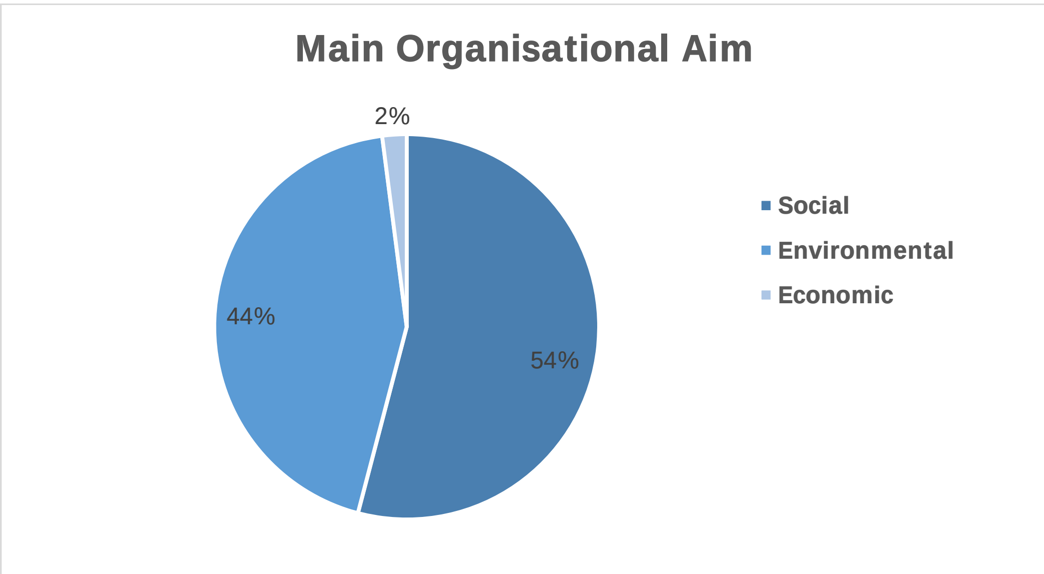
It is crucial to highlight that tonnage is not a definitive measure of importance even where it is part of what an organisation does. Many lighter items can be highly valuable to reuse organisations (for example resale of second hand bikes can be low weight, but high value). Some materials will have much higher carbon savings associated with them than others. Examples can be found through ZWS carbon metric tool[7]. Some organisations use materials as a way to achieve social aims – for example trainee opportunities in repair. They are more interested in maximising these social aims than total tonnages.

The range of tonnage figures reported, from zero tonnes to in excess of 1,000 tonnes is just one indicator that shows the diversity of the Third Sector re-use and recycling organisations.

4.3 Organisations by primary aim

Organisations were asked to report what their primary aim was, they could only select one option. Just over half (54%) of organisations said their main organisational aim was social.

Figure 4.3 Main organisational aim (based on 113 responses).



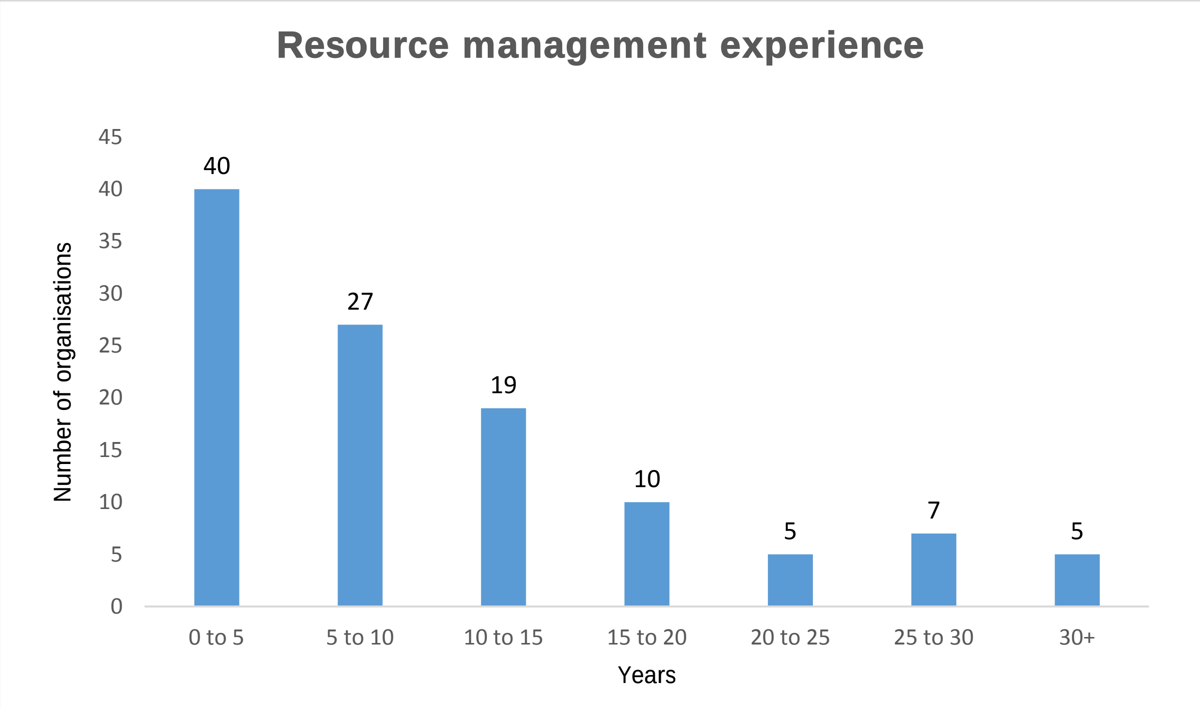
[7] http://www.zerowastescotland.org.uk/content/carbon-metric-stakeholder-tool-and-user-guide

4.4 Organisations by experience

Organisations were asked how long they had delivered resource management activities.

Figure 4.4 shows the years of experience across the 113 organisations. 12 years was the mean length of resource management activities by the organisation and over half of the organisations in this survey had less than 10 years resource management experience.

Figure 4.4 Organisations by years of resource management experience (based on 113 responses).



4.5 Organisations by local authority

The organisations were asked in which local authority areas they delivered their activities. Organisations could select multiple local authority areas as required.

Table 4.1 indicates that there is Third Sector activity reported across all 32 local authority areas. Glasgow and Edinburgh had the greatest concentration of activity in terms of the number of active organisations present (18 each), which might be expected given their populations.

Table 4.1 Organisations by local authority (based on 113 responses).

Local Authority	Number of active organisations	Local Authority	Number of active organisations
Aberdeen City	5	Inverclyde	6
Aberdeen Shire	10	Midlothian	10
Angus	7	Moray	10
Argyll & Bute	8	Comhairle nan Eilean Sair	8
Clackmannanshire	5	North Ayrshire	6
Dumfries & Galloway	6	North Lanarkshire	11
Dundee	6	Orkney	3
East Ayrshire	4	Perth & Kinross	14
East Dunbartonshire	9	Renfrewshire	10
East Lothian	9	Scottish Borders	4
East Renfrewshire	12	Shetland	5
Edinburgh	18	South Ayrshire	5
Falkirk	9	South Lanarkshire	14
Fife	11	Stirling	8
Glasgow	18	West Dunbarton	7
Highland	15	West Lothian	11

4.6 Organisations by total income

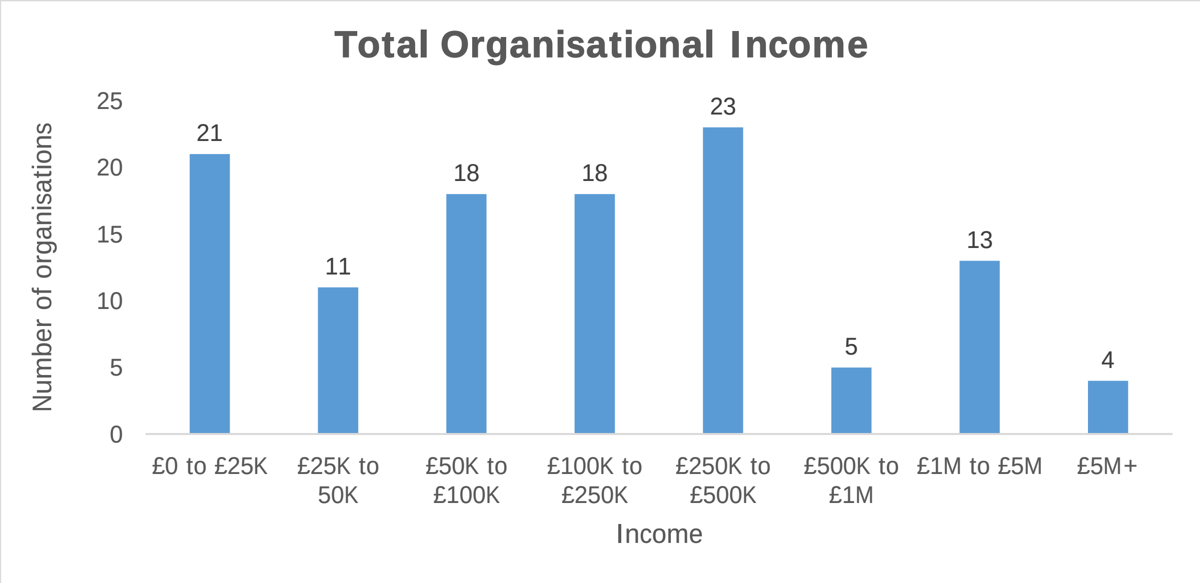
All 113 organisations reported on their total gross incomes from their last full accounts. The majority of the reported accounting periods were 1st April 2012 to 31st March 2013. The total income figures in Section 2.6 do not differentiate between re-use and recycling income and income derived from other sources.

The specific income derived from re-use and recycling activities will be covered separately in Section 4.7. A separate analysis of these two income totals is a reminder that Third Sector organisations deliver a range of services, not all of which are related to re-use and recycling activities.

Figure 4.5 provides a simple analysis of total organisational income grouped into appropriate bands. Some headline figures:

- Median gross organisational income was £151,235 and this is more representative of a “typical” organisation, as the graph shows.
- 21 organisations reported a gross organisational income of less than £25,000.
- Four organisations reported a gross organisational income in excess of £5,000,000.

Figure 4.5 Organisations by total income (based on 113 responses).



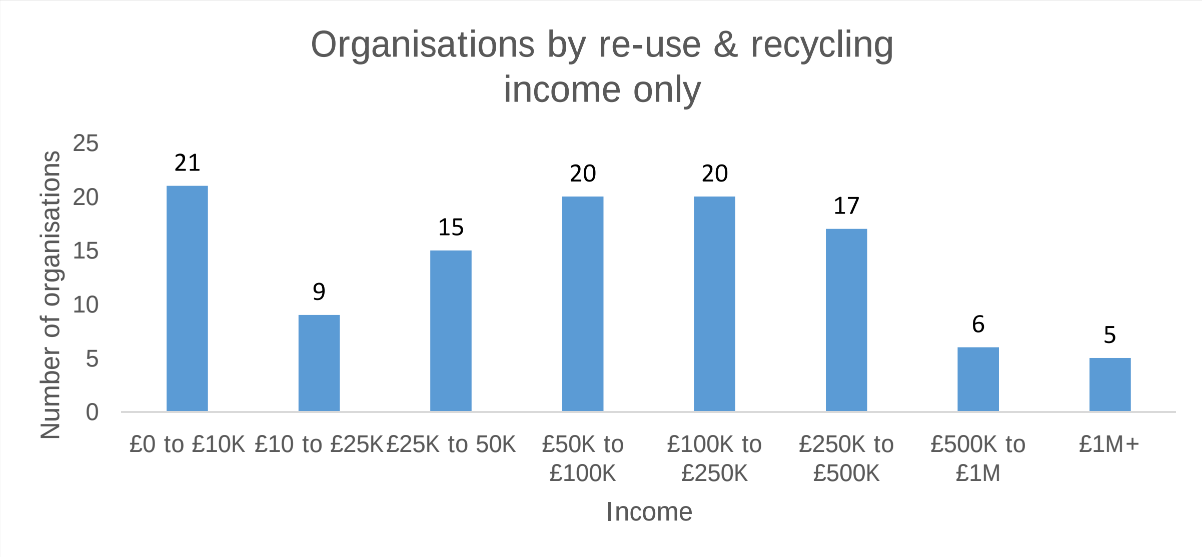
4.7 Organisations by re-use and recycling income

A total of 57 organisations reported that re-use and recycling activities are only part of what they do. These organisations were asked to report on the proportion of their income that is derived only from their re-use and recycling activities.

Figure 4.6 is an analysis of organisational income for all of the 113 organisations that was derived from re-use and recycling activities only. Some headline figures are:

- Total annual income from re-use and recycling activities was £24,613,964.
- The median annual income from re-use and recycling activities was £81,054.
- 21 organisations had an annual income from re-use and recycling activities of less than £10,000.
- Five organisations had an annual income from re-use and recycling activities in excess of £1,000,000.

Figure 4.6 Organisations by re-use and recycling income only (based on 113 responses)



4.8 Earned versus grant income

The 113 organisations reported on earned and grant income for their last set of accounts. Earned income was defined as covering all sales, service level agreements, contracts and donations.

The State of the Sector report from 2011 provided data on earned versus grant income for 2010-2011 and Figure 4.7 shows a direct comparison between the two sets of accounting data.

Figure 4.7 Organisations by earned and grant income over a previous (2010-2011) and current (2011-2013) financial years (based on 113 responses).

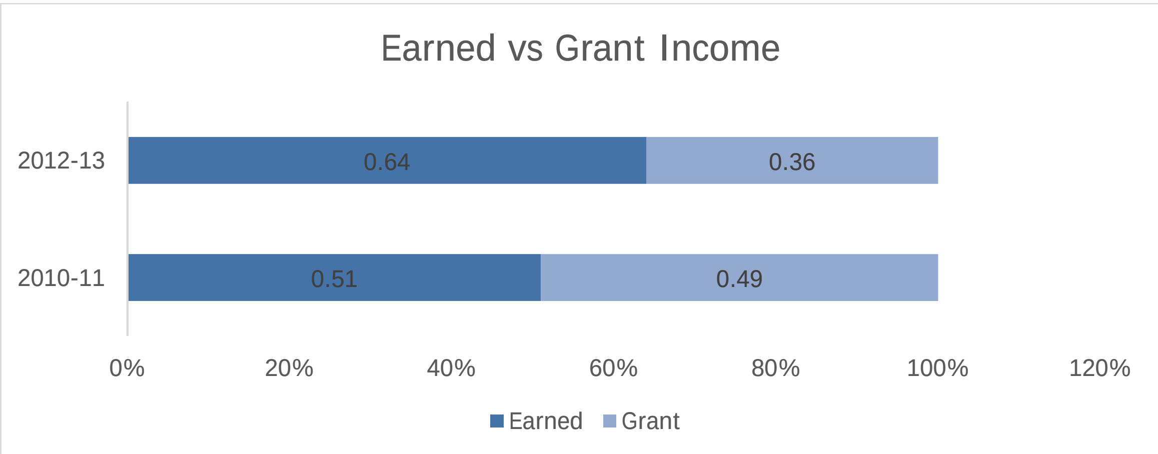


Figure 4.7 shows that there is a trend towards more earned income and less grant income for Third Sector organisations from 2010 to 2013. 51% of total gross income was reported as earned income for 2010-11 whilst that figure for 2012-13 show the earned income figure increasing to 64%.

4.9 Financial reserves

A total of 102 organisations reported on the financial reserves they were currently holding with the mean value of organisational reserves being £68,834. However, the mean figure is very misleading.

For those organisations that reported on them: 26 organisations reported they had reserves of £5,000 or less whilst 14 organisations reported they had reserves in excess of £100,000.

4.10 Other activities

A total of 57 organisations reported that they undertook other activities that were not related to resource management activities. These activities were wide-ranging and included social, economic and environmental themes. The authors recognise the need for further studies to increase the understanding of the wider impacts generated by these other activities.

- Social themes included supporting ex-offenders, welfare projects, care and repair projects, mental health projects and housing support projects.

- Economic themes included estate and property management services, funding and grant management, heritage projects, international development, cafes, retail and training services.

- Environmental themes included ranger services, energy and carbon projects, beach management, conservation projects, horticultural projects and aquaponics.

The full transcript for other activities reported is in **Appendix 9.1**

4.11 Staffing levels

Organisations reported on their current employee numbers and whether staff numbers were increasing or decreasing.

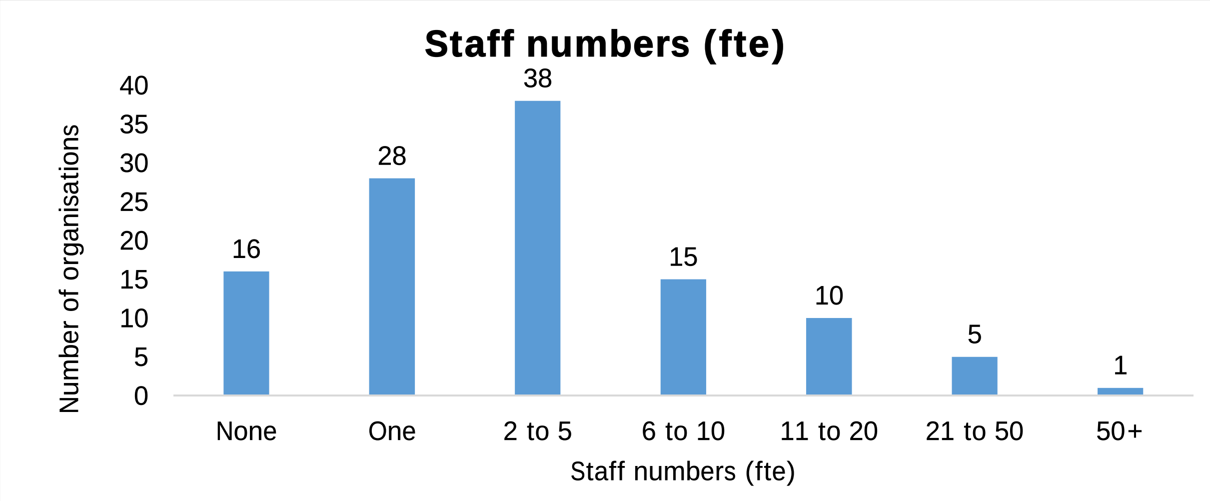
Figure 4.8 shows an analysis of staff numbers reported. Total employee numbers reported were 685 full time equivalent staff. This equates to a mean value of 6.1 full time equivalent staff per organisation. The largest twelve organisations employ over 50% of the total staff numbers reported whilst 75 organisations reported employing five or fewer full time equivalent staff.

When asked about any changes to their staff numbers:

- 60 organisations (57%) reported they had about the same amount of staff as 12 months ago
- 17 organisations (16%) reported they had less staff than 12 months ago.
- 29 organisations (27%) reported they had more staff than 12 months ago.

The 2011 State of the Sector Survey reported that when asked about any changes to their staff numbers of the 73 organisations that responded; 40 had about the same amount of staff (54%), 25 had less staff (34%) and 13 had more staff.(18%)

Figure 4.8 Organisations and staff numbers (based on 113 responses).



4.12 Volunteer and placement numbers

Organisations reported on their volunteer and placement numbers and the specific issues they faced with regards to volunteer and placement support. It can be hard to quantify volunteer and trainee numbers, because organisations can classify activities differently, and the duration, and intensity, of a given post can vary significantly (e.g. a single full-time one-year placement in a training programme may be just as important as several smaller shorter placements elsewhere; and the nature of the placement could be very different too).

For the purposes of this survey a placement is a formal work placement that is managed by an external organisation, usually for a fixed time period with an objective of gaining paid employment in the future. A volunteer is defined as a more informal arrangement between an individual and an organisation that might not be bound by a fixed time period and doesn't link to a formal work programme.

A better understanding of what placements and volunteers represent to organisations would also help show the social value of this work, but is hard to obtain in a survey of this type.

Based on what organisations reported, the total number of placements was 682. This equates to a mean value of 10 placements per organisation per year.

The total number of volunteers reported was 3,448. This equates to a mean value of 34 volunteers per organisation per year.

The main challenges with regards to volunteers and placements were:

- Recruiting, supporting and retaining volunteers and placements.
- The quality of volunteers and placements.
- The costs of volunteers and placements.
- Staff requirements to manage volunteers and placements.
- Building relationships with placement organisations.
- Providing suitable tasks for volunteers and placements.

The mixed quality of volunteers and training placements was a recurring issue with the organisations that responded to this question. Anecdotal evidence would suggest that organisations have a mix of good and bad volunteering experiences and that a poor experience can be to the detriment of both the organisation and the volunteer. Further analysis would be required to qualify this information.

The full transcript for the reported challenges with volunteers and placements is in **Appendix 9.3**

4.13 Tenders, contracts and service level agreements

Organisations reported on tenders, contracts, service level agreements and who they were with. Tenders are a form of procurement that invite organisations to bid for a contract supplying goods and services. A service level agreement is an agreement between two or more parties, where one is the customer and the others are service providers.

With public funding opportunities becoming scarcer and increasingly competitive, more Third Sector organisations are recognising the importance of winning contracts to deliver re-use and recycling services. A number of Third Sector organisations are also defining their relationship with local authorities, housing associations and other public bodies in the form of a service level agreement (SLA) where there is a defined level of service and an agreed set of outcomes.

Figure 4.9 shows the range of success with tenders and contracts. 15 organisations reported that they had been successful with at least one tender they had bid for. 20 organisations had considered tendering, whilst 41 organisations had not considered tendering at all.

The 2011 State of the Sector Survey reported that 16 organisations had been successful with at least one tender they had bid for. There is little difference between this and the 2013 figure of 15 organisations.

Figure 4.9 Tender and contracting experiences (based on 92 responses).

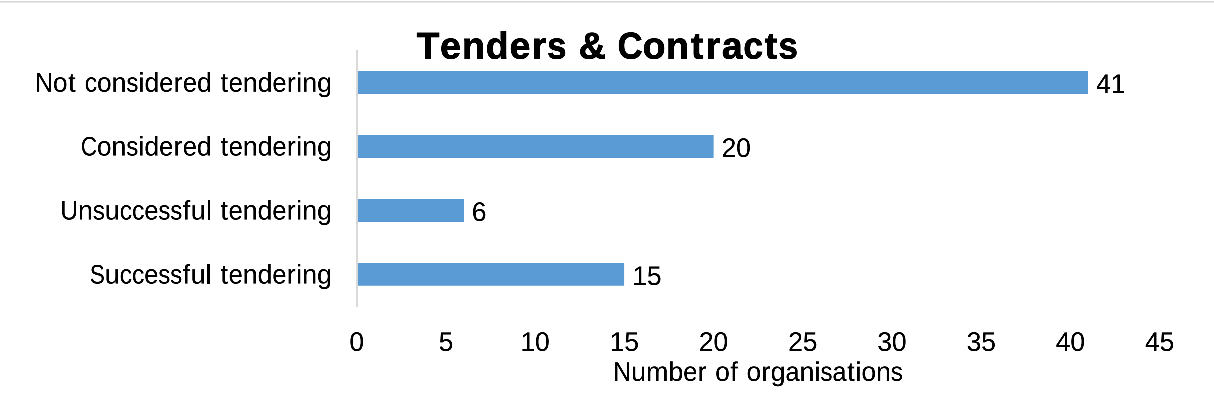


Figure 4.10 shows the range of experiences with service level agreements. Thirty six organisations have currently got or previously have had at least one service level agreement in place. Thirty three organisations reported that they had never had a service level agreement.

The 2011 State of the Sector Survey indicated that 25 organisations had at least one service level agreement in place.

Figure 4.10 Service level agreement (SLA) experiences (based on 82 responses).

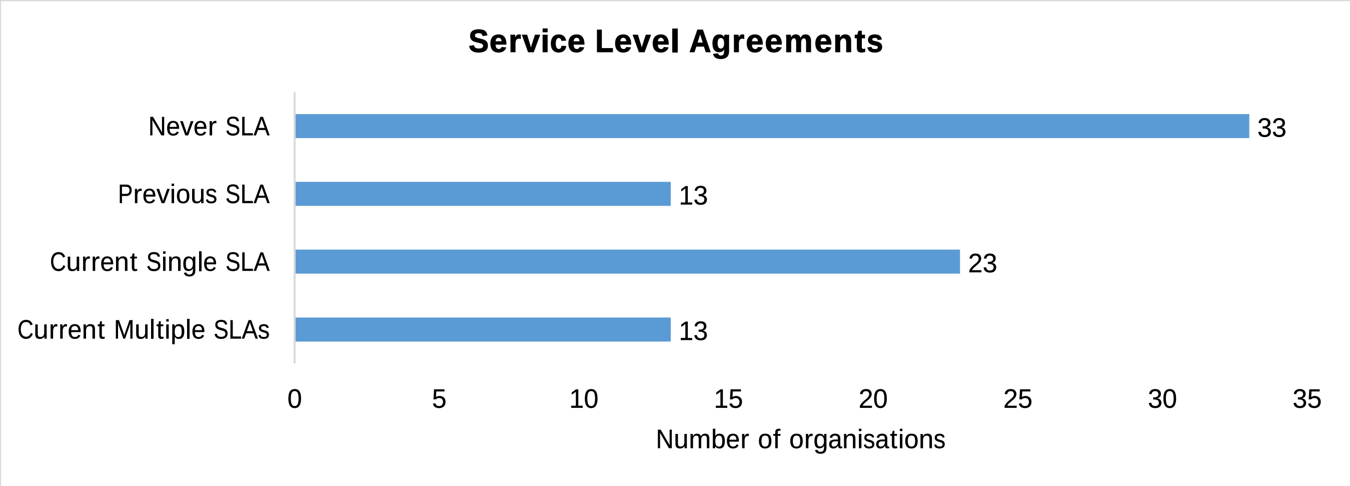
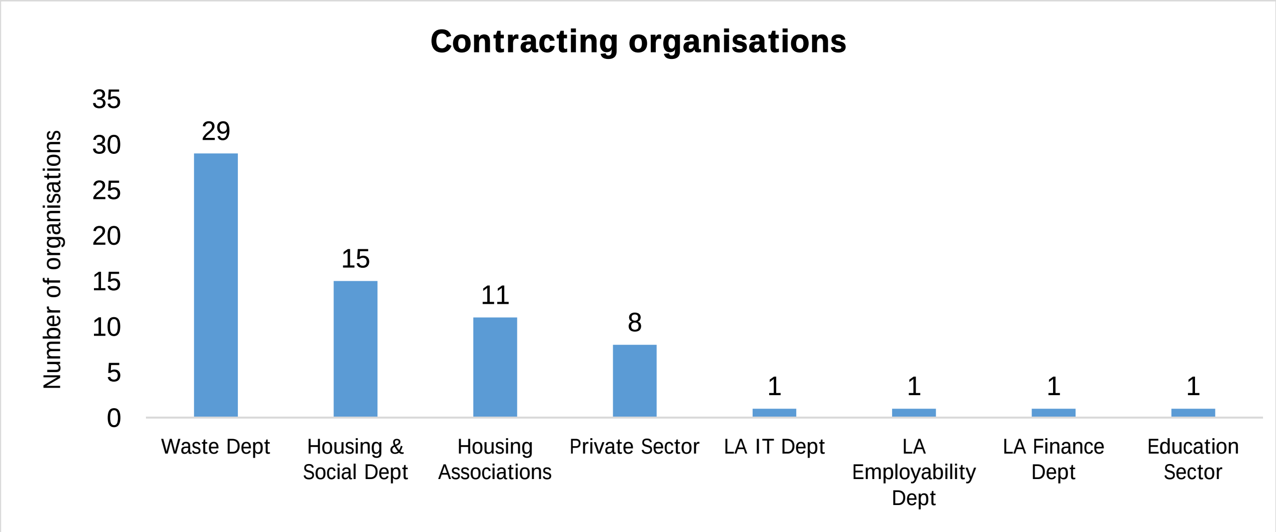


Figure 4.11 shows on whose behalf the contracts and service level agreements were being delivered. Local authority waste departments were the largest group with 29 organisations having either a contract or service level agreement in place with them. The second largest figure was for local authority housing or social work departments with 15 organisations having either a contract or service level agreement in place with them.

59 contracts and service level agreements were with the public sector whilst only 8 contracts and service level agreements were with the private sector.

Figure 4.11 Contracting organisations (based on 92 responses).



Anecdotal evidence indicates that it is the larger and more experienced organisations that are more successful with tenders and SLAs. One reason would be that they have more resources at their disposal which enables them to invest in the time required to complete tender documents and enter into service level agreement discussions.

A challenge to Third Sector organisations is how to successfully compete with the Private Sector in a competitive tendering process. Revolve quality standards may go some way to equip organisations with the tools to compete more successfully.

4.14 Waste licensing

Organisations reported on their waste licensing arrangements.

The Scottish Environmental Protection Agency (SEPA) is responsible for waste licensing in Scotland. If an organisation, even a charity or voluntary organisation produces, stores, transports, transfers, treats or disposes of waste, there are various waste regulations that need to be complied with.

A waste carriers licence is usually required for the transportation of waste materials in Scotland by waste and recycling companies and fees may be payable. There are exemptions for charities and community organisations that require only a registration process and are free of charge.

A waste management licence is usually required to run a waste management facility. For organisations that undertake re-use and recycling activities, a waste management licence or an exemption may be applicable, depending on the type and size of their activities.

Figure 4.12 Waste licences (based on 93 responses).

Most organisations that responded to this question reported that they either had the relevant waste licences in place or that they had the appropriate exemptions from those waste licences.

4.15 Organisation & staff training

Organisations reported on their internal training activities over the past 12 months in terms of what they had done and what they would be interested in doing this year.

Figure 4.13 Training in past 12 months (based on 93 responses).

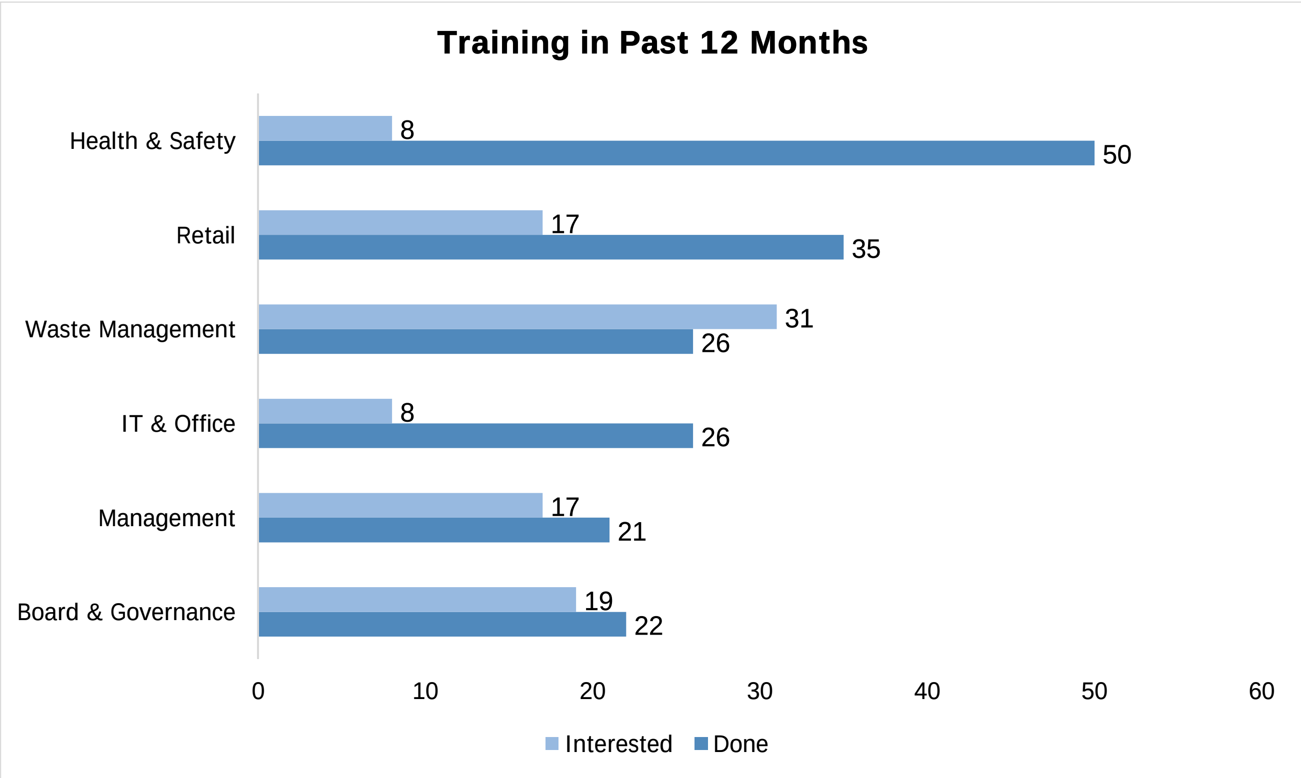


Figure 4.13 indicates that health and safety training was the most reported type of training undertaken with 50 organisations reporting they had done some. Retail training was the second most reported with 35 organisations with much of this training taking place within the Revolve programme of training activities.

The two lowest reported types of training were management and governance training activities.

4.16 Quality standards

Organisations were asked if they were working towards or had obtained a quality standard measurement.

A total of 37 organisations reported that they were working towards the new Revolve[8] standards. Nine organisations reported 'Investors in People'[9] standards and 'Investing in Volunteers'[10] standards.

The Revolve standards have been designed specifically for Third Sector re-use organisations in Scotland and the aim is to raise the bar in terms of the quality of the re-use services they deliver and to provide an enhanced customer experience.

Table 2. Organisations and quality standards (based on 93 responses).

Quality Standard	Organisations	Quality Standard	Organisations
Revolve	37	Investing in Volunteers	9
Investors in People	9	ISO14000/01	3
ISO9000/01	3	PQASSO	3
Disability Aware	2	EFQM	4
Fundraising Standards	1	Tidy Business	1

With the exception of Revolve the number of organisations participating in other quality standard processes was relatively small. Anecdotal evidence suggests that some organisations do not consider obtaining a quality standard as an integral part of their activities and other organisations don't have the capacity or funds to complete the process.

The authors would argue that with increased competition for funding a quality standard is one piece of evidence that could demonstrate an organisation is delivering services to a given set of approved standards and is worthy of funding.

4.17 Measuring impacts

Organisations reported on how they measured their impact and successes or would like to measure success.

Measuring the levels of tonnage diverted from landfill is the traditional way most re-use and recycling organisations have measured and reported their activities. This also relates to how some organisations are funded for their activities in terms of pounds per tonne.

[8] Revolve is Scotland's national re-use quality standard: www.revolvereuse.com
[9] Investors in People is a management framework for high performance through people: www.investorsinpeople.co.uk
[10] Investing in Volunteers is the UK quality standard for good practice in volunteer management: http://iiv.investinginvolunteers.org.uk

However, the impacts of re-use and recycling activities go beyond simple tonnage diversion and can include environmental and social impacts. This question was to measure the extent to which organisations were capturing data on these alternative outcomes. Both Zero Waste Scotland and CRNS recognise the need for further studies to increase the understanding of the wider impacts generated by these activities.

Figure 4.14 Organisations measuring the success of their activities (based on 93 responses).

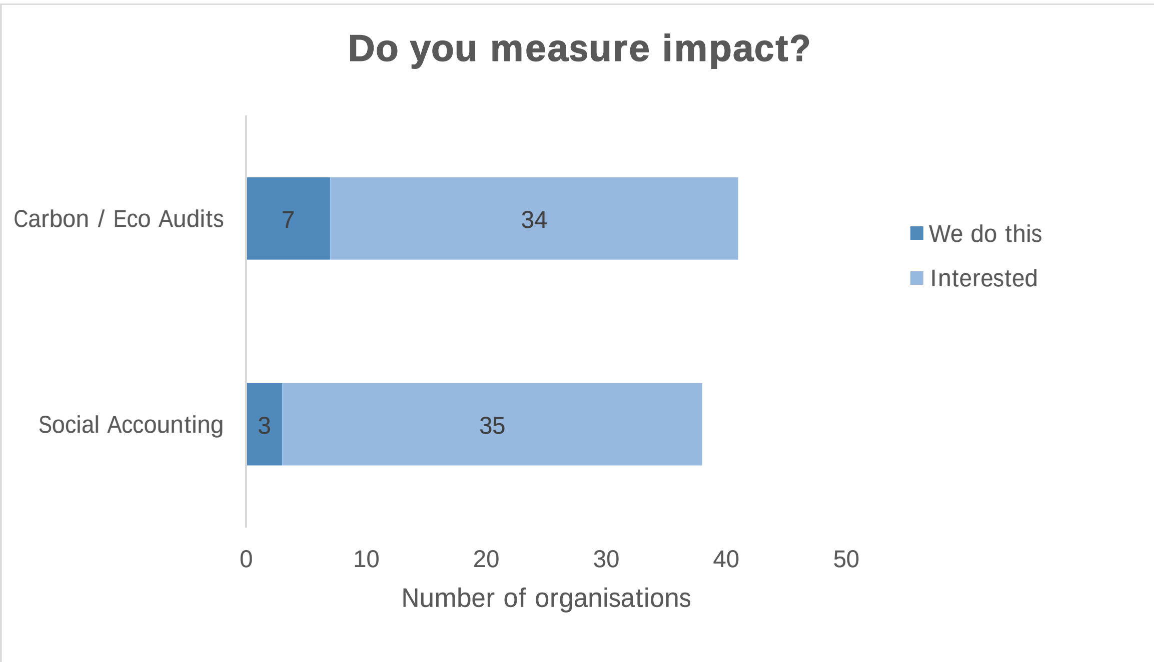


Figure 4.14 shows that very few organisations currently undertake either social or environmental accounting. Seven organisations reported measuring their carbon impact and three organisations measured some form of social value to their activities. It was noted that a reasonable number of organisations indicated their interest in measuring their carbon (34 organisations) and social impacts (35 organisations) in the future.

Anecdotal evidence would suggest that measuring both social and environmental impact is something that many organisations would seriously consider doing but would require some external support. Most funding bodies do not require this form of evaluation as part of the grant requirements. The exception is the Climate Challenge Fund.

The authors would suggest that there is an argument for the introduction of financial incentives for the delivery of positive social and environmental outputs and outcomes. That is out-with the scope of this report but may benefit from further study.

5 Re-Use Activity Overview

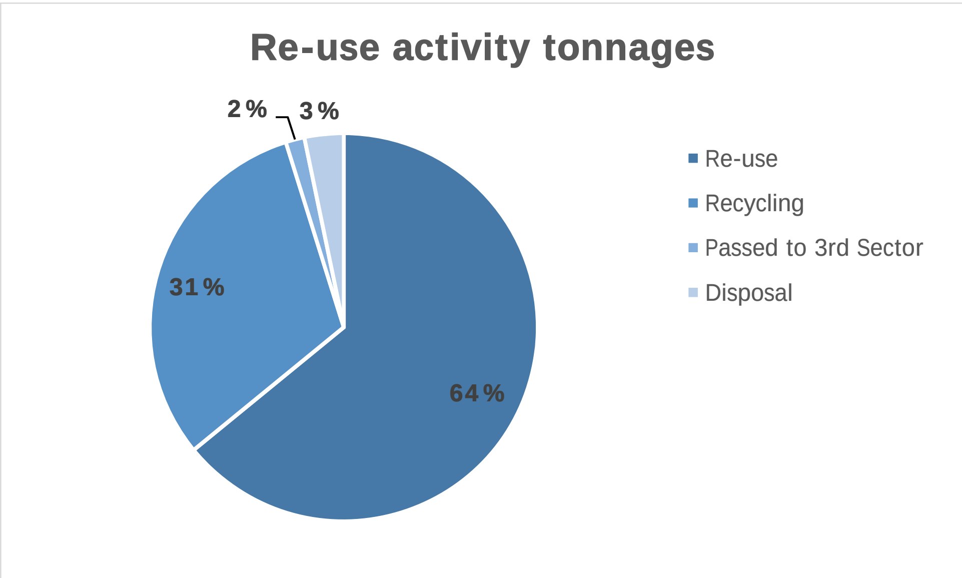
The survey collated re-use activity data from 83 organisations in total via this State of the Sector Survey and from ongoing Revolve data surveys. The re-use activity overview below is an amalgamation of these two data sets.

5.1 Re-use tonnage

The re-use organisations were asked for their annual re-use, recycling and disposal tonnages and also asked how they measured their re-use tonnage.

For the purpose of this survey organisations have been classified as either re-use or recycling organisations. All re-use organisations participate with some level of recycling, particularly when materials are beyond re-use. In this case re-use organisations separately identify and report recycling tonnage.

Figure 5.0 Re-use activity tonnages (based on 83 responses).



Surveyed organisations reported collecting 21,369 tonnes of materials from re-use operations in 2013. Of this, 13,695 tonnes (64%) went for re-use.

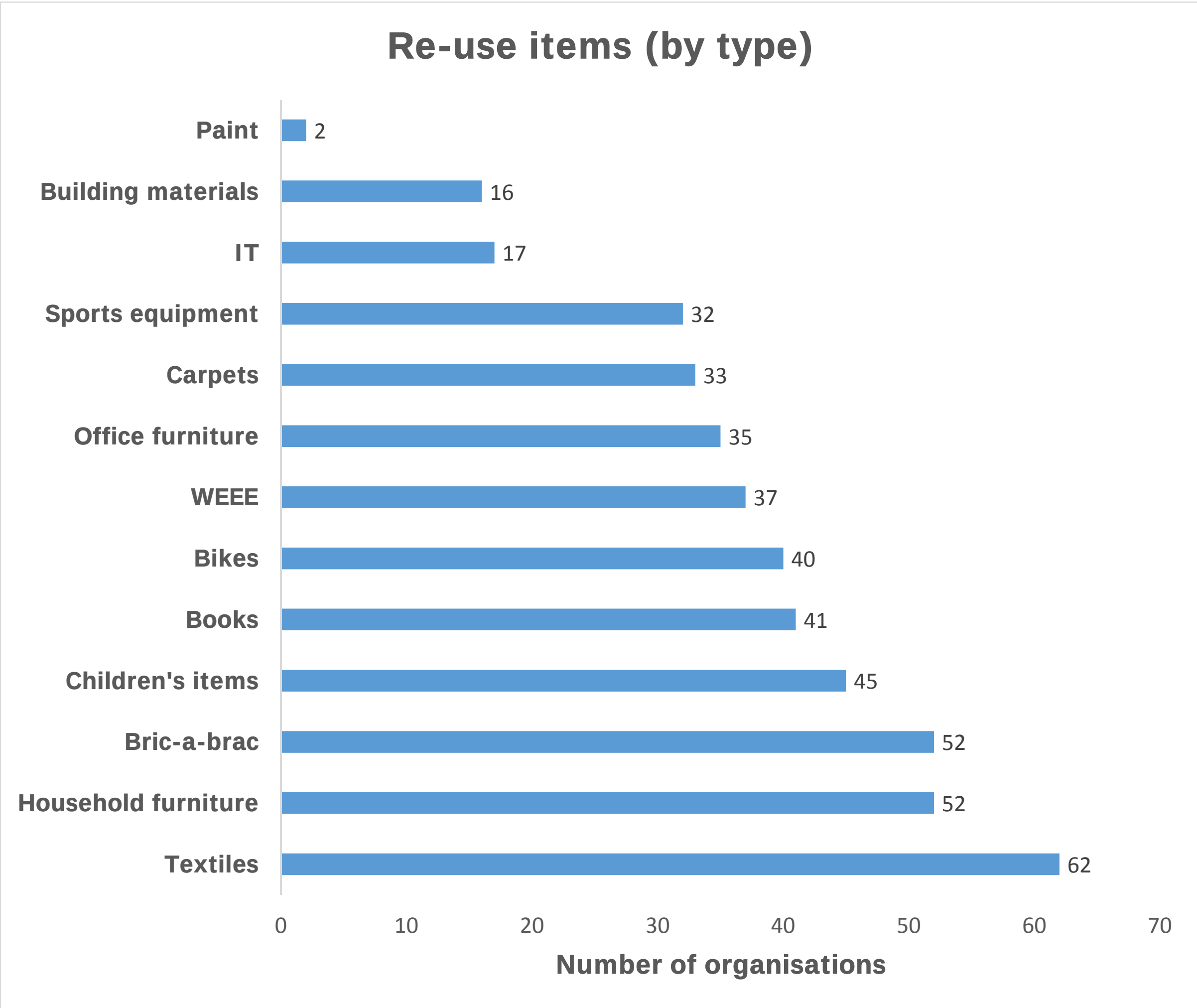
Of the rest, 335 tonnes (2%) was transferred to another Third Sector organisation (for example where one organisation collects a material and the receiving organisation processes it), 6,641 tonnes (31%) went for recycling (where the material was not suitable for re-use) and 698 tonnes (3%) went for disposal (where neither re-use nor recycling was an option).

5.2 Re-use items and materials handled

A total of 83 re-use organisations were asked what materials they handled. Organisations could give multiple answers. The figures shown here do not necessarily represent the relative importance or size of the materials streams mentioned.

The most common item was textiles with 62 organisations reporting that they handled textile items. The next two most common items, each reported by 52 organisations, were household furniture and small bric-a-brac items.

Figure 5.1 Re-use items by type. (Multiple answers given). (Based on 83 responses)



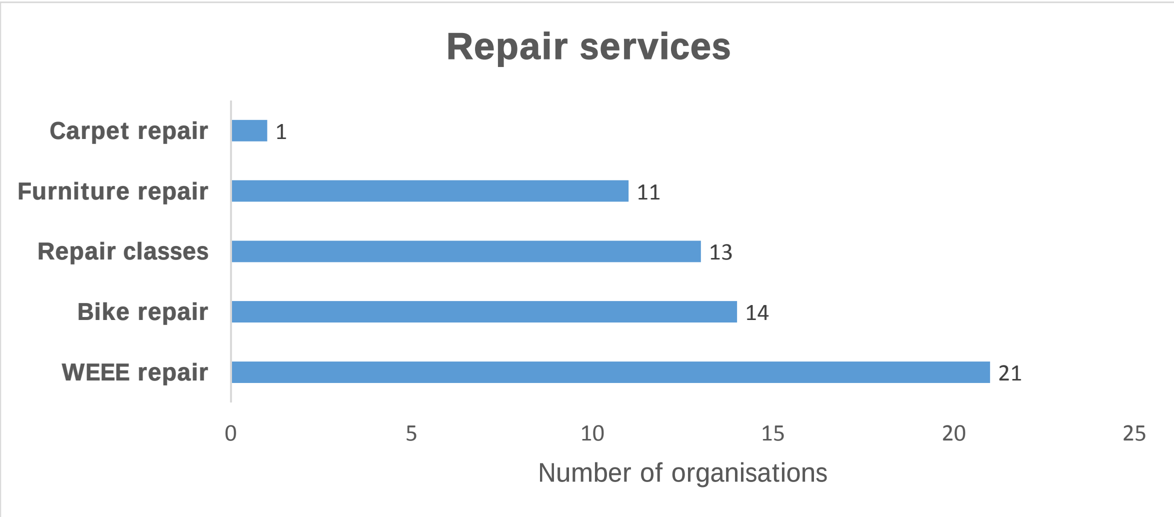
5.3 Repair services

The re-use organisations were asked what (if any) type of repair services they undertook as part of their preparation for re-use activities.

The most common form of repair service was for WEEE items (21 out of 83 organisations). Fourteen organisations reported that they did some form of bike repairs. Figure 3.2 gives a breakdown of the different repair services reported.

Anecdotal evidence received by CRNS over the last year indicates that more re-use organisations would be interested in providing furniture repair services if they had suitable staff and volunteers to undertake the repairs process. Some organisations did not have suitable space available for a repairs workshop.

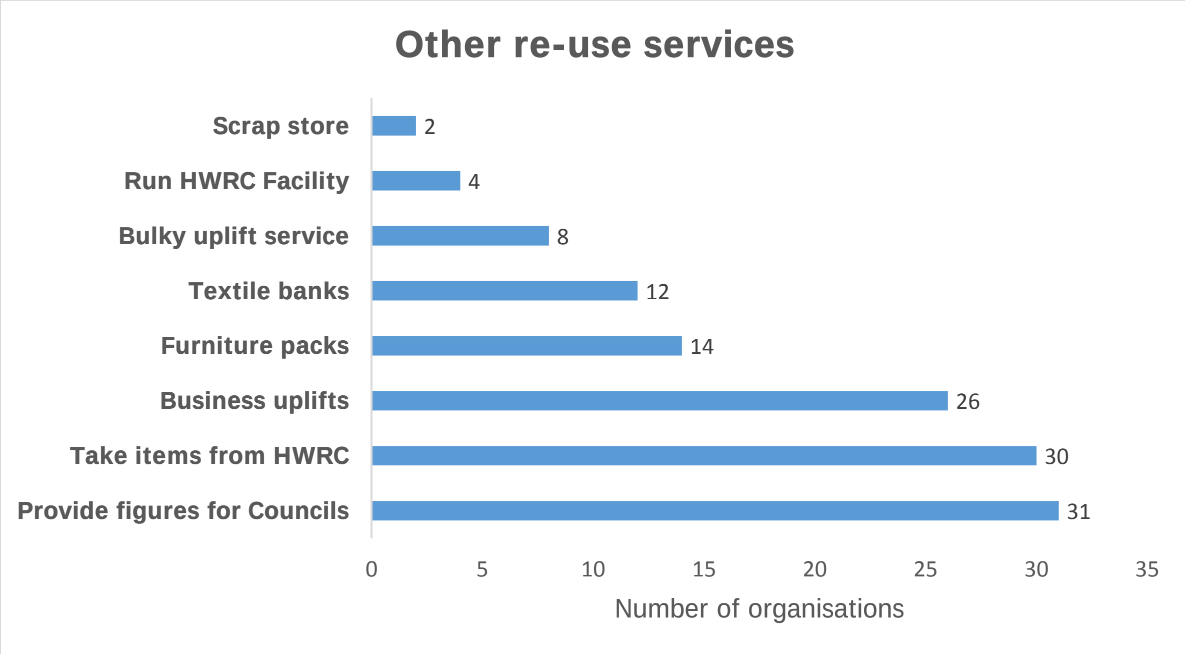
Figure 5.2 Repair services offered by re-use organisations (based on 83 responses).



5.4 Re-use services

The re-use organisations were asked about the range of different services they provided other than repairs and for whom they delivered those services. Figure 5.3 provides detail on the different services reported by re-use organisations.

Figure 5.3 Other collection, distribution and re-use services delivered (based on 83 responses).



5.5 Major issues for re-use organisations

The re-use organisations were asked what they felt were the major issues and challenges they faced going forward.

- The major issues raised continue to be **funding and finance** and the challenge of moving from grants to a social enterprise model. A recurring theme appeared to be an imbalance between what local authorities and local housing organisations demanded from Third Sector re-use services and what they were willing to pay in exchange for that service. Full cost recovery is an aspiration for most of the respondent organisations.

- Many organisations have outgrown their original premises and require **investment in larger shops, offices and storage** facilities to meet their expanding activities and future expectations.

- Managing larger donations of goods effectively is time consuming and requires good **stock management systems** to be implemented.

- **Sourcing scarce good quality white goods** continues to be a challenge for re-use organisations. There is a limited supply of items and it is sometimes difficult to access the local authority and private sector supply chains.

- **Marketing** is an area that many organisations have under-invested resources in. In an increasingly crowded marketplace, when there is competition both for donations and customers, it is vital that organisations address this.

- Developing and maintaining **relationships with key agencies** is a challenge for re-use organisations. For example; Local authorities, local housing organisations, the retail charity sector and funders. All of these stakeholders should recognise and be aware of the work that their local re-use organisations are delivering.

- Feedback from Third Sector organisations involved with the **Revolve programme** is overwhelmingly positive. The shared view is that engaging with Revolve has improved the quality of the services provided by re-use organisations and resulted in an enhanced customer experience.

The complete responses for the major issues for re-use organisations are in **Appendix 9.4.**

6 Recycling Activity Overview

A total of 33 organisations reported that they undertook recycling activities that were distinct from any re-use or community composting activities.

Recycling activity was defined as collecting and processing materials with the aim of producing new materials and products.

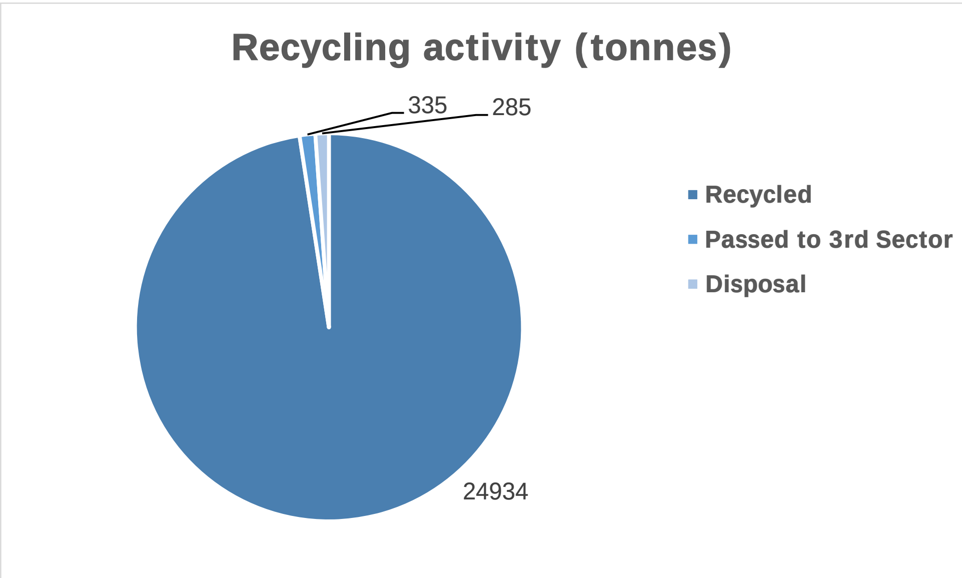
6.1 Recycling tonnage

The recycling organisations reported on the recycling tonnages they handled annually.

The total reported annual recycling tonnage was 25,697 tonnes collected for the 33 recycling projects. From this total figure it was reported that 24,934 tonnes (99%) was passed on for recycling, 335 tonnes (<1%) was passed to another Third Sector organisation and 285 tonnes (<1%) was passed on for disposal.

The transfer of materials between Third Sector organisations is likely to occur where one organisation collects on behalf of another or where the transfer benefits both organisations.

Fig 6.0 Recycling activity tonnages (based on 33 responses).



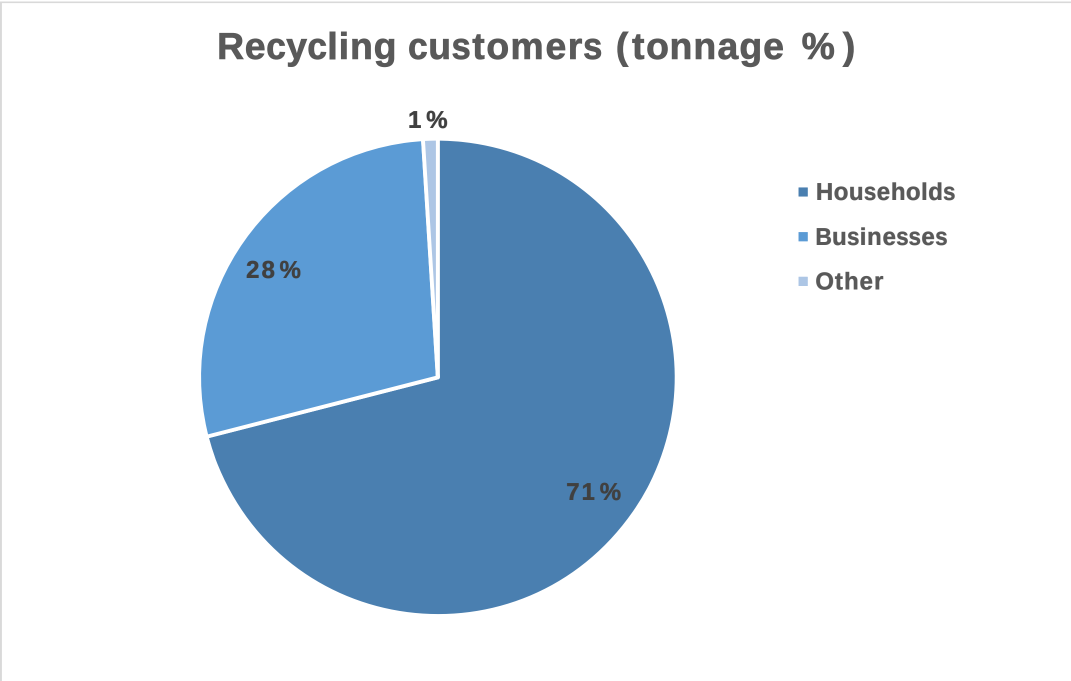
6.2 Recycling customers

The recycling organisations were asked what proportion of their recycling tonnages came from households and what proportion from businesses. They were further asked to give the number of household and business customers they had annually.

- 71% of the total recycling tonnage collected came from household sources.
- 28% of the total recycling tonnage collected came from commercial sources.
- 1% of the total recycling tonnage collected came from other sources.

- Recycling organisations collected materials from a total of 96,469 households.
- Recycling organisations collected materials from a total of 3,155 commercial customers.

Fig 6.1 Recycling activity by customer type (based on 33 responses).

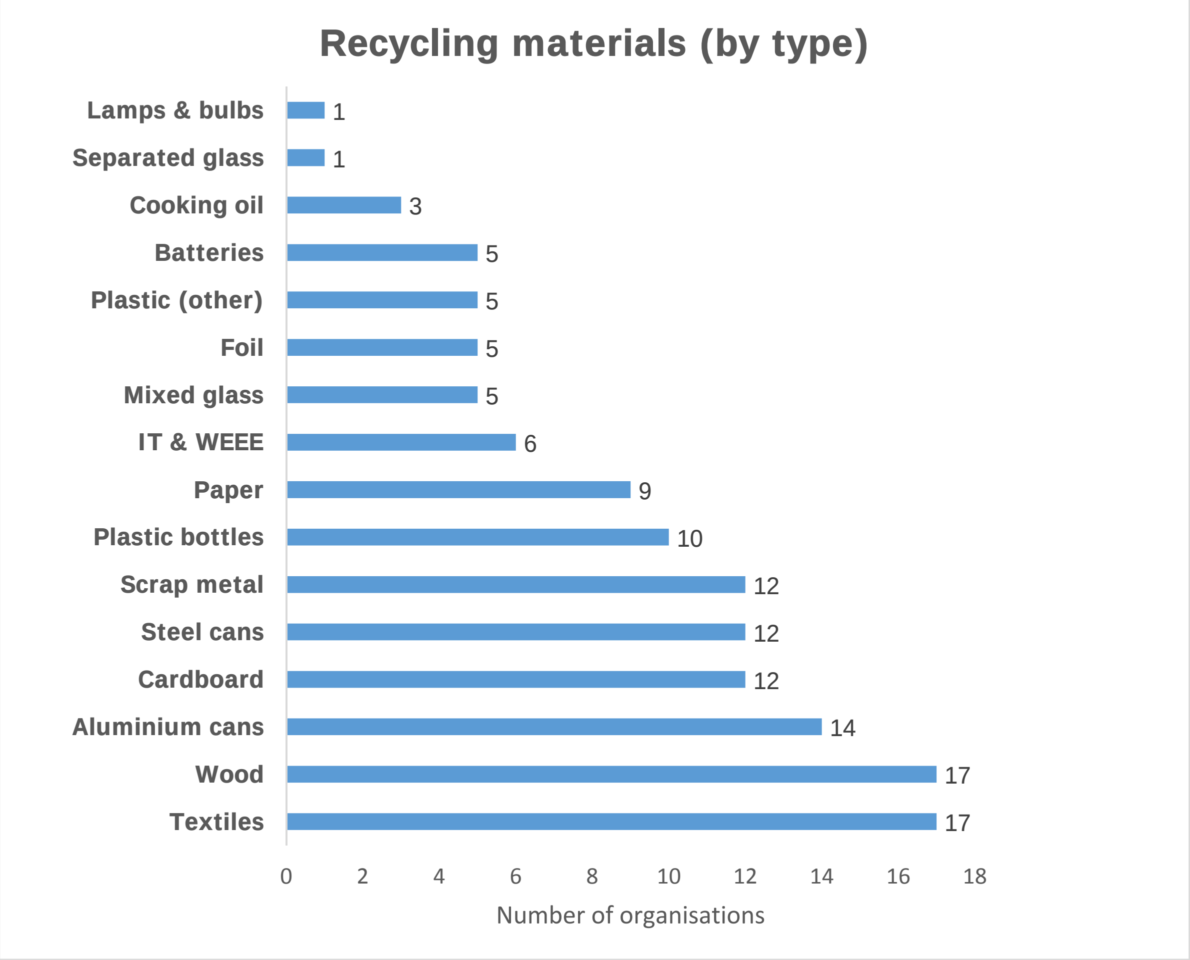


6.3 Recycling materials handled

The recycling organisations were asked what materials they handled and were given a list of 16 different materials to select from. From these responses the relative size of a given material stream cannot be ascertained.

Wood and textiles were the most reported items with 17 organisations reporting that they collect them, closely followed by aluminium cans (14 organisations). Scrap metal, steel cans and cardboard were collected by 12 organisations.

Figure 6.3 Recycling materials handled. (Organisations could select multiple material streams). (Based on 33 responses).



6.4 Major issues for recycling organisations

The recycling organisations were asked what their major issues and challenges were.

- The major issue for recycling organisations continues to be **financial sustainability and trading**. Organisations are trying to increase earned income whilst at the same time competing for scarce grant income.

- **Transport, fuel and logistics costs** were raised as an issue. Recycling organisations delivering services in rural areas are finding this to be an increasing challenge. Some organisations have the associated costs of managing island recycling services which include the logistics of transporting materials to mainland markets.

- The **supply and demand of recycling materials** is also an issue. As market prices rise for materials there is increased competition for them, including from the private sector. Organisations have to work harder to source good quality recyclate. Identifying new material streams and opportunities is an important task for recycling organisations.

- Developing and maintaining **relationships with stakeholders**, including local authorities and the private sector was also highlighted as important.

The complete responses to the major issues facing recycling organisations are in **Appendix 9.5.**

7 Composting Activity Overview

Twelve organisations reported that they were involved in delivering community composting projects. Six organisations were active and six organisations had suspended their composting activities at the time of reporting.

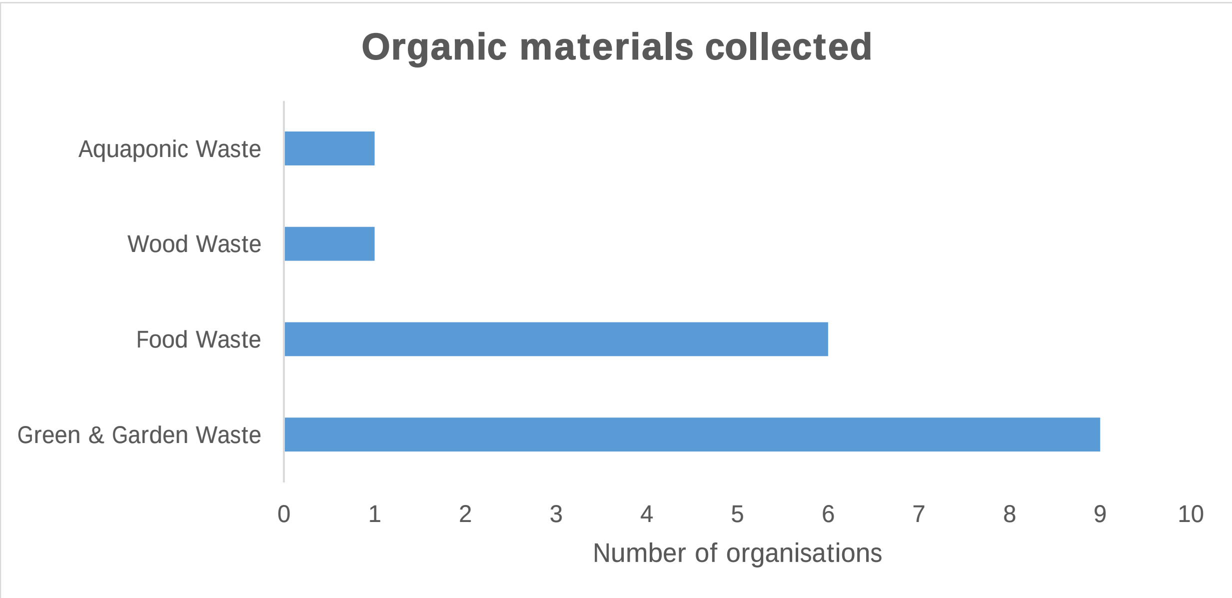
Community composting is mainly a small-scale local operation managed by a community organisation. It involves the collection or delivery of green garden waste (and sometimes food waste) to a specific site where it goes through a biological composting process.

7.1 Organic materials collected

Organisations reported on the type of organic materials they collected.

Nine organisations reported that they collected or managed green and garden waste. Six organisations reported that they collected food waste. One organisation reported that they collected wood waste. One organisation reported that they collected aquaponic waste.

Fig 7.0 Composting activity by materials collected (based on 9 responses).



7.2 Compost tonnages

Organisations reported on the annual tonnages of organic waste they collected and the compost produced.

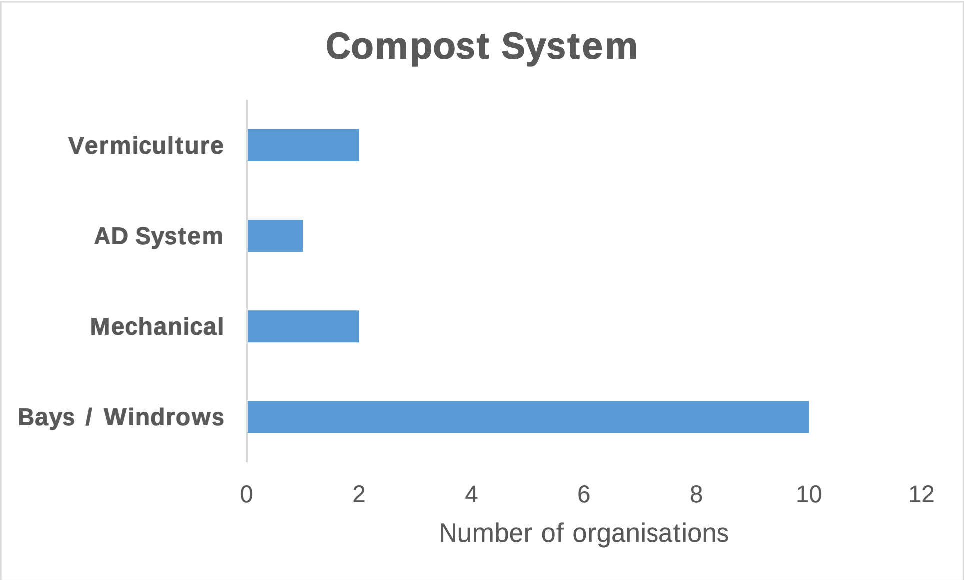
The total annual tonnage collected was 454 tonnes of green and garden waste and 20 tonnes of food waste. This resulted in the production of a total of 165 tonnes of compost and 3 tonnes of digestate.

The organics data is dominated by two organisations that between them account for over 90% of the reported tonnage figures.

7.3 Composting systems

Organisations reported on the type of composting systems they use.

Fig 7.1 Composting activity by system used (based on 12 responses).



Ten organisations reported that they compost in bays. Two organisations reported that they compost mechanically. Two organisations reported the use of a vermiculture (worm-based) system. One organisation reported that they used an Anaerobic Digestion (AD) system. One organisation gave advice and presented practical demonstrations but did not currently produce compost.

7.4 Composting regulations

Organisations were asked about the PAS100 composting regulations. BSI PAS 100 stands for the British Standards Institution's Publicly Available Specification for composted material

BSI PAS100 looks at the whole composting process from the raw materials through to the quality of the end product. It is an industry standard designed to ensure that the compost is produced to a reliable and safe standard.

One organisation reported working towards the composting standard PAS100. The eleven other organisations reported that they were not working towards the PAS100 standards and had no plans to.

The BSI PAS100 standard is appropriate for large-scale commercial composting and food waste processing operations where quality and safe standards are of paramount importance.

Without the PAS100 standard compost cannot be traded or sold as a commercial product or classed as waste diversion.

This evidence suggests that the majority of community composting organisations, who are dealing with small volumes of compost have not considered the PAS100 standard as relevant to their activities. The financial and administrative costs of achieving the standard are another barrier for small, local community composting organisations.

7.5 Compost project staff and volunteers

Organisations were asked to report on their current annual staff and volunteer numbers.

They reported a total of 13 full time equivalent staff employed and 66 volunteers and six placements in their composting projects. Those reported figures gave an average of 1.1 full-time equivalent staff and 4.3 volunteers per compost project.

These figures demonstrate the small-scale nature of community composting and also indicate that they rely on the support and work of volunteers to keep the project going.

7.6 Compost products

The organisations reported on what they do with the compost material they produce.

- Five compost projects reported they use the compost themselves on the same site whilst one compost project reported using the compost on a community orchard.
- One of the compost projects reported selling their compost to various retail outlets. This was the organisation that was working to the PAS100 standards.
- One compost project was currently not producing any compost but undertaking waste education activities to encourage home composting.
- One organisation was currently storing compost product.

7.7 Major issues for community composting organisations

The community composting projects were asked what major issues they faced going forward.

Tonnages reported for community composting are low compared with the reported re-use and recycling tonnages. Community composting projects are small, mostly rural, rely on a small staffing contingent and the continuing support of dedicated volunteers.

- A major issue for community composters was the requirement to implement the **industry standard BSI PAS100** for compost. Without gaining accreditation to the PAS100 standard there is a danger that community compost will not be recognised as recycling. Community composting projects also identified **funding and finance** as an issue that continues to be a problem. Again, without a PAS100 standard a compost project is less likely to attract funding from local authorities or funding bodies.

- There is anecdotal evidence that some of the community composting projects have realigned themselves as local **food growing and healthy living projects**. They have done this to attract other sources of funding that support this type of activity.

- The **rollout of food waste collections** has impacted on community composting with more food and green waste diverted via local authority collections and sent to large scale processors.

- Recruiting and retaining good quality **volunteers** was also highlighted as an issue.

The full returns to the issues facing community composting projects are in **Appendix 9.6.**

8 Education Activity Overview

A total of 36 organisations reported that they delivered waste education and awareness projects. It was clarified that these activities were distinct from their direct re-use, recycling or community composting activities.

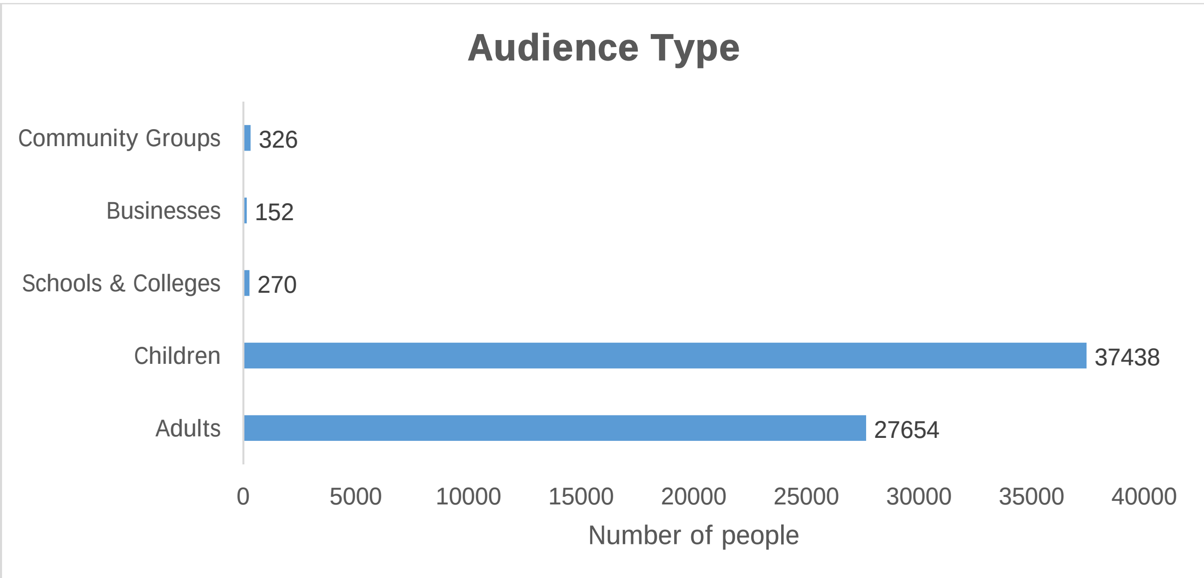
As these projects focus on awareness raising or behaviour change, they do not record tonnages associated with any activity (although the expectation would be that changed behaviour will ultimately lead to improvements in recycling, repair or re-use). Typically projects have recorded activity based on engagement indicators, such as the number of people they have been in contact with.

Waste education and awareness projects enable their audience to understand the benefits of re-use and recycling activity or to highlight the local services available. It is an attempt to influence waste and recycling behaviour through a variety of education and communication strategies.

8.1 Education activities and target audience

Organisations were asked about the type of education activities they delivered and the participants involved.

Fig 8.0 Education activity by audience (based on 36 responses).



In terms of individuals, they reported contact with a total of 27,654 adults and 37,438 children. Anecdotal evidence indicated that the depth and quality of contact varied widely from organisation to organisation.

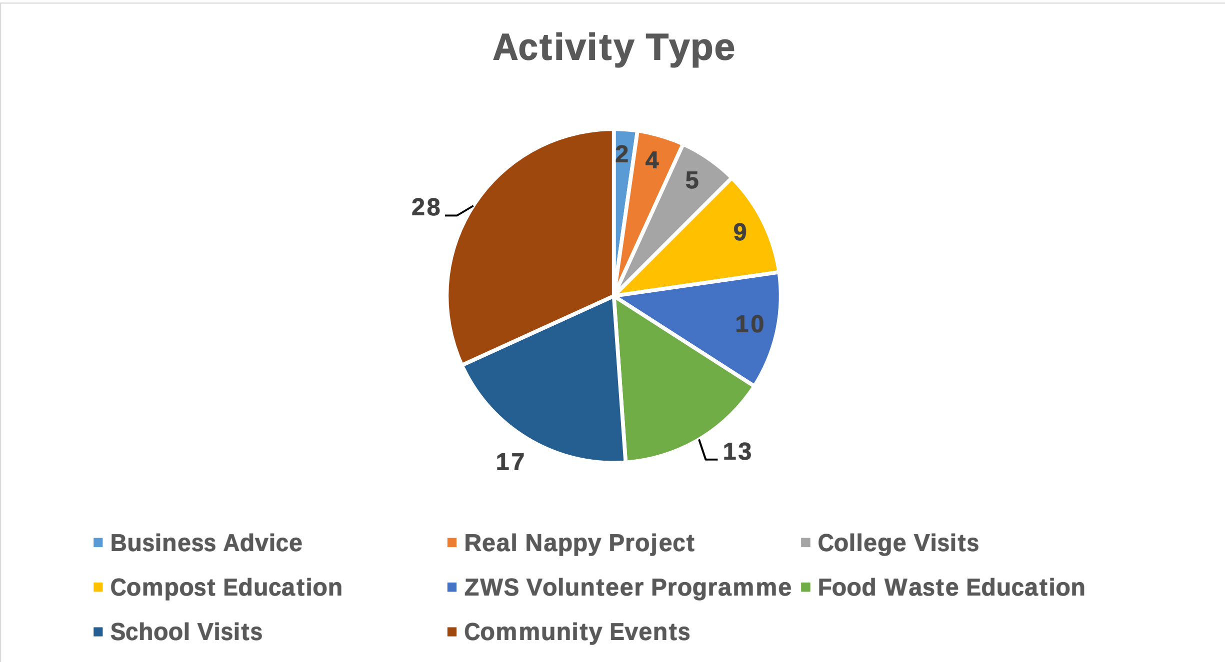
In terms of institutions, they reported contact with 326 external community groups, 270 schools & colleges and 152 businesses.

In terms of type of activity delivered, 28 organisations reported they ran community events and 17 organisations reported they ran organised school visits. These were the most popular type of activity delivered.

Ten organisations said they were actively involved with the ZWS Volunteer and Community Advocate Programme and 13 organisations were actively involved in food waste awareness projects.

Only 2 organisations reported that they provided information and advice to Scottish businesses. With the launch of the Waste (Scotland) Regulations 2012 in January 2014 there is potential scope for organisations to provide more support and services to businesses looking to improve their recycling systems.

Fig 8.1 Education activity by type (based on 36 responses).



8.2 Monitoring and evaluation systems

The education projects were asked about the monitoring and evaluation systems they used. Here are the collected responses:

- We do baseline and follow up audits
- Data is collected on our activities
- Evaluation forms

- Surveys
- Informal reporting to local authority
- None yet, just starting process
- No monitoring takes place
- Only internally
- Records of visits and feedback from questionnaires
- Regular feedback from volunteers and questionnaires
- Produce report for ZWS
- Record numbers involved, group survey forms; press coverage generated, likes/interaction on our Facebook page
- We have undertaken community audits to create a baseline
- We will record any response from the council

These responses indicate that organisations are more likely to record data such as numbers of events and participants but less likely to do formal evaluations. Anecdotal evidence suggests that evaluating the effects of a waste education programme and measuring behaviour change is a challenging and time consuming activity; not all organisations have the resources or skills to do it effectively.

8.3 Major issues for waste education projects

The waste education projects were asked about the major issues they faced.

- The major issue cited was sourcing reliable **funding and finance** for the education projects. Without getting any income for tonnages the education projects are reliant on payments for quality education campaigns and related services. It is a challenge to get local authorities and schools to invest directly in these education projects when they themselves are managing tight budgets.

- If waste education and awareness projects can express their added value in terms of actual **behaviour change analysis** then they will gain credibility in being considered part of the solution towards a zero waste society.

- Other issues raised are **volunteer recruitment** and retention, lack of development support and maintaining effective community campaigns with limited capacity.

The full returns for the major issues facing waste education projects are found in **Appendix 9.7.**

9 Appendices

9.1 Other activities & projects

What activities does your organisation deliver other than re-use and recycling?

A total of 57 organisations reported that they undertook activities that were not related to resource management activities. These activities were wide-ranging and included social, economic and environmental themes. The authors recognise the need for further studies to increase the understanding of the wider impacts generated by these other activities.

The responses were grouped under the following general topics:

Environment / Food / Energy (25 organisations)

Housing Services / Social Work / Homelessness (24 organisations)

Education / Employability / Training (11 organisations)

Trading / Retail Services (9 organisations)

Transport (4 projects)

Overseas Development (3 organisations)

9.2 What are the challenges to becoming more financially sustainable?

The responses were grouped under the following general topics with the total number of organisations that made a related comment. Some examples of the responses are also given.

Trading & Sales Issues (16 organisations)

“Large challenge for an island based project. Generating more income is important to our future.”

“Income generation and keeping sales going.”

“Finding income generating projects that are financially viable in a small community.”

Grant Funding Issues (13 organisations)

“The main challenges are finding more grant funding and securing sources of good quality re-usable furniture in order to sustain cash flow within the business.”

“Reduction of short-term grant periods and the inability of grant providers to recognise the importance of reinforcing a message expensively delivered in an initial period.”

“Chasing short term grants is inefficient and time consuming.”

Infrastructure Issues (5 organisations)

“Infrastructure and vehicle fleet are key challenges. Lack of space and need for new factory building.”

Contract Issues (5 organisations)

“Winning additional external contracts is becoming increasingly difficult in the current climate.”

“We need to have a longer term and more secure contract arrangement with the Council.”

Staffing Issues (4 projects)

“In order to expand we need more staff to run the business but find it difficult to secure funding for initial employment.”

“Making the transition towards funding a full-time manager when previously we were only paying for a part-time manager.”

Marketing Issues (4 organisations)

“Finding the right people to drive forward and market the social enterprises we have to offer.”

Capacity & Resources Issues (3 organisations)

Lack of investment opportunities and the capacity to engage fully in the process whilst delivering operational priorities.

Competition Issues (3 organisations)

“Trading activities are constrained being a community organisation, and not wanting to compete with local traders.”

“Pressure from industry super-recyclers particularly in the textiles business.”

“Competition from private sector and the local authority expanding their recycling services.”

Start-up Capital Issues (2 organisations)

“We want to become a social enterprise but start-up capital is a problem”

9.3 Issues and comments about volunteers and placements

The responses were grouped under the following general topics with the total number of organisations that made a related comment. Some examples of the responses are also given.

Volunteer Management Issues (10 organisations)

“Funders don't always appreciate this can't be done for free and requires specialist management skills.”

“Staff time required to manage and support volunteers - no problem in recruitment.”

Quality Issues (6 organisations)

“Meeting their expectations. We have a lot of school leavers or young people who expect an easier ride than the working world expects from them.”

“Reliability, turning up as agreed. Motivation, some are prepared to work harder than others.”

Cost Issues (5 organisations)

“Finding costs for training for staff to manage volunteers.”

“Resources needed to supervise.”

Time & Capacity Issues (5 organisations)

“The time taken to induct and then manage a volunteer who may only be with us for 4 weeks.”

“Managing volunteers is time consuming, they are not all good at timekeeping.”

Finding & Recruiting Volunteers (5 organisations)

“Recruiting competent volunteers with enough knowledge to function test and do other tasks.”

Organisation Location Issues (4 organisations)

“Our current premises are very cramped and the distance to travel to us may be an issue.”

Training Issues (3 organisations)

“Keeping their training and information up to date.”

Retaining Volunteers (2 organisations)

“Recruiting and retaining volunteers is an issue.”

9.4 Re-use activity issues and comments

- Competition for donated goods.
- Competition in the marketplace for our collection services and materials
- Value of Revolve is beginning to show with more promotion of the accreditation to a wider audience.
- We need to make better use of promotion of Revolve customer service feedback facility which is now on our product support information card given out with the till receipt.
- We are now in the process of issuing a repair information card after accreditation training day with trading standards officers.
- Disposing of videos, cassette tapes and goods in too poor a condition to sell is expensive.
- Disposing of waste.
- Revolve has enhanced customer experience and makes induction of new volunteers easier.
- Finance, nothing else is a problem.
- Good relationship with our council currently.
- Good project working with Valpak on white goods, seems to be working.
- Introduction of EPOS system will help recording and accuracy of till input.
- EFQM quality standard awarded recently.
- Revolve has helped us to increase the amount of starter packs and trainees.
- Just starting our service, plans to expand.
- Lack of investment capital.
- Lack of suitable premises and capital.
- Lack of suitable premises, no experienced or skilled staff and no funds to buy equipment.
- Lack of funding and resources to start up with full potential.
- Revolve has helped our pricing policy and we are more organized.
- No pressure from local authority to use recycled or reclaimed materials in new builds or renovations.
- Feedback tells us that showroom layout has improved and we have more customers.
- A donations log has helped us identify problems with furniture received.
- Increased footfall this year.
- Would like proper recognition and partnership with local authority.
- Quality of donations is mixed.
- Redistribution of unwanted student items - lot of waste saved.
- Revolve accreditation & grant support has helped our project

- Revolve helped to improve the layout of the shop floor and entrance which has made the shop more appealing and more welcoming which we feel has helped to increase the customer experience and therefore the sales.
- They have helped with the layout and look of the shop floor.
- Small rural population, transport issues.
- The shop now looks amazing, customers keep on complimenting us!
- We used to look like a bicycle recycling warehouse and now we look like a professional retailer.
- We've dramatically increase our sales compared to last year figures.
- Too many donations, lack of council flexibility and lack of storage space.
- Training received by employees has improved customer services and raised awareness of the sales staff.
- Transport costs remain high.
- Revolve has improved the warehouse presentation and our layout of furniture.
- We are marketing our services just now to try to obtain more used household items for our packs.
- We have been streamlining our sales by displaying furniture and bric-a-brac with individual and grouped pricing. We have used these methods after a visit on the Revolve program.
- The Revolve program has got our staff thinking about how we should be operating more effectively in respect of sales of furniture.
- We have changed a lot of in-store processes due to Revolve.
- Better quality assurance for customer now.
- We have found customers struggle to grasp what Revolve and EFQM is about and we have to explain regularly.
- Staff are more aware of checking items for quality, fire tags and cleanliness of items.
- With Revolve support, we are now operating a much more professional and customer-friendly retail environment
- Through Revolve-related activity and support, there has been a noticeable “feel-good” factor among both staff and volunteers with a greater sense of pride in working in their new, enhanced surroundings.

9.5 Recycling activity issues and comments

- Can recycling is becoming more difficult.
- Competition from private sector
- Competition from the large waste management companies.
- Competition with commercial companies.
- Costs of getting off island.
- Dealing with Mixed Plastic.
- Few households consistently put glass out for collection however could already be recycling themselves using a communal collection point.
- Firewood supply project.
- Generating more contracts. Maintaining our competitiveness.
- Issues surrounding the possible removal of service level agreement with local authority if Zero Waste Scotland does not deem our glass recycling social enterprise to be closed loop and so will not let the local authority claim any of the tonnages being recycled unless it goes through another route.
- Reduction in sales of our recycled products, due to cut backs in building projects or potential buyers selecting cheaper non-recycled alternatives.
- Just starting out.
- Local authority tendering for kerbside sites. Large recycling business manipulating market prices.
- Our factory is no longer fit for purpose and we need to move to a new build to be able to grow and develop new services and continue to work in partnership with Council for future alternate weekly collections.
- Stopped our major recycling services due to local authority taking over the service.
- We encourage our volunteers to recycle the materials that they collect if they have access to Council collection facilities. On many occasions the materials are grossly contaminated and are not sent for recycling.

9.6 Composting activity issues and comments

- We are not currently composting, there is no funding.
- Our project is stopped due to lack of funding, SEPA and the vets are the problem.
- We do home composting education and awareness only now.
- Just a small operation now.
- A private company now do the food waste collections.
- We are trying to get the local college to pay for the service.
- Challenges are sufficient knowledge and training plus access to sufficient "browns" e.g. woodchip to balance quantity of kitchen waste being collected.
- PAS 100 cost is prohibitive. We have evidence of flatworm. Difficulty of retaining volunteers. End of funding for food waste trials.
- Small project only.
- Not currently composting.
- Just lost our community garden. Not composting now.
- Sales and gearing up for new 3000 tonne additional green waste contract.

9.7 Education activity issues and comments

- Although we have around 30 trained volunteers we lack the finance to employ a co-ordinator to offer the guidance, mentoring, training and co-ordination of visits, talks, etc.
- Engaging and retaining volunteers within the programme as we target those with most challenging behaviour and/or difficult to engage.
- Engaging with hard to reach communities.
- Finance will always be a challenge.
- Funding issues, including an issue which came to light this year in that all funding awarded by Zero Waste Scotland is deemed to be State Aid. We do not think this should be the case and have found that is severely limits the funds we can secure through this source.
- Involving teenagers is hard work.
- Just starting in partnership with our Local Council.
- Lack of affordable land and planning restrictions.
- Lack of funding for schools making it too costly for them to travel to the site. Lack of appropriate staff.
- Limited number of volunteers with sufficient knowledge, experience and time to carry out such activities.
- Over-reliance on council funding from the one council.
- Recruitment and retention of quality volunteers. Lack of finance for specific areas of work, for example, real nappies.
- Relentless charity appeals which do not provide education on recycling awareness but simply grab clothes from kids for fundraising purposes.

9.8 Copy of Survey Questions

1. Name of your organisation
2. Survey contact details
3. What are the main aims of your organisation?
4. How many years has your organisation delivered resource management activities?
5. In which local authorities does your organisation operate?
6. What period do your most recent accounts cover?
7. What was your total gross income?
8. What % of your total gross income was earned / grant funded?
9. What is the % estimate for this current year?
10. What level of reserves do you have?
11. Are your activities all resource and recycling related?
12. What % of your total gross income is derived from resource and recycling activities?
13. How many staff do you have?
14. Do you have more or less paid staff that twelve months ago?
15. How many volunteers and placements do you have?
16. What issues do you have in relation to volunteers and placements?
17. What training have you provided for your staff and volunteers?
18. How many contracts have you tendered for in the past 12 months?
19. Do you have any Service Level Agreements?
20. Who are the SLA's with?
21. What waste licences do you have?
22. Do you have an up to date health and safety policy?
23. Do you hold any quality standards?
24. How do you measure success?
25. Does your organisation deliver re-use activities?
26. Are you registered with Revolve?
27. What were your re-use tonnage figures for the last 12 months?
28. What items and materials do you handle?
29. Do you offer repair services?
30. What services do you offer local authorities and businesses?
31. Do you retail to the public?
32. How many donations did you get last year?
33. What are the greatest issues facing your re-use activities?
34. Do you do community composting?
35. How many composting sites do you have?
36. What are your annual compost tonnages?
37. What type of composting do you do?
38. Have you any composting exemptions or PAS100 accreditation?
39. How many composting staff and volunteers do you have?
40. What happens to your compost?
41. What are the major issues facing your composting activities.
42. Do you do any recycling activities?
43. What are your annual recycling tonnages?
44. What % of material comes from commercial / households?
45. What are your customer numbers for businesses / households?
46. What recycling materials do you handle?
47. What are the major issues facing your recycling services?
48. Do you do any waste education activities?
49. How many customers did you have for your waste education activities in the past 12 months?
50. What different waste education activities do you do?
51. How do you monitor and evaluate your waste education work?
52. What are the major issues facing your waste education work?

ZERO WASTE SCOTLAND

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