



community enterprise unit
limited

"...working with enterprising communities"

Social Accounts for the Year

1 April 2002 – 30 March 2003

**Community Enterprise Unit Ltd
69a Sidwell Street
Exeter
EX4 6PH**

Telephone: (01392) 666281

Acknowledgements

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- Ian Derbyshire – Devon County Council
- John Pearce - Community Enterprise Consultancy and Research


2. **All of the 29 stakeholders who took the time to complete questionnaires and let us know what they really think, you know who you are!**


3. **Our VEST trainees, for your patience, good humour and all the things that we've learned from you**


4. **TRAIN 2000, Liverpool for sharing your experiences with us.**

Contact Us

For further information contact us at:

 CEU Ltd
69a Sidwell Street
Exeter, Devon
EX4 6PH

 01392 666281

 01392 666288

 ceu@ceultd.co.uk www.ceultd.co.uk

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1. Introduction

Debbie Stewart and Helen Vines, two of the founder Directors of CEU Ltd, were first introduced to Social Auditing in 1997 when John Pearce delivered training in Devon and later used social accounting methods as the basis for his evaluation of a project that they were both employed in. This stimulated a passion for the concept with both of them, which led to them designing a one-day *Introduction to Social Auditing*, which they went on to deliver to numerous organisations in Cornwall and Devon. This training was very well received.

In 2001 CEU were engaged to work on a one-to-one basis with 'Artshape' in Gloucester to guide them through conducting a Social Audit. They did this with support from John, who also chaired the Social Audit Panel.

CEU remained in touch with John and were introduced to the 'Train 2000' team in Liverpool who, with support from Liverpool City Council, piloted the newly accredited course in Social Accounting and Audit to a number of organisations in their area. As a result of the pilot findings we were inspired to seek and secure funding to deliver supported training in Social Accounting and Audit in Devon.

2. History and Background

2.1 Our Organisation

CEU Ltd is a **not-for-private-profit worker co-operative** and a company limited by guarantee, set up in March 1998. We are based in Exeter in Devon though our work takes us across the South West region.

2.2 Our Team

CEU has a small core team comprising:-

- Debbie Stewart & Helen Vines – Social Enterprise Support Workers
- Alison Randall – Office Manager (half time)

All three are company directors and take shared responsibility for running the co-op.

We also have a growing team of associates, namely people with the relevant ethos and skills to complement ours and add to our capacity at peak times. Collectively we bring a diverse range of skills and experience to the work that CEU undertakes.

2.3 Our Services

Our team has been delivering high quality community-based economic development to support emerging and established social enterprises within Devon for over six years. We work with a range of organisations including community businesses, co-ops and development trusts. We also work with agencies and partnerships supporting community-based regeneration.

We offer business and technical support as well as packages of training, advice and consultancy services to a range of community, public and private sector clients.

The Co-op's strap-line is "*working with enterprising communities*".

Training

In partnership we have developed a range of accredited training for community enterprises at OCN and NVQ levels, most notably in Business Planning for Community Enterprises and more recently in Social Auditing. We also devise tailored training to meet clients' specific needs, covering a range of issues within the spheres of organisational, project and financial management, personal development, community planning and monitoring and evaluation.

Facilitation & Consultation

An element of our work involves group facilitation and promotion of community involvement. Our work has recently focussed around a range of initiatives and themes, including facilitation of Planning for Real © a method of consultation involving the building of 3d models. We have also undertaken needs analysis, market research and have planned and facilitated 'action planning consultation' for local strategic partnerships.

Social Auditing

Social auditing, or measuring the social and environmental impact of the work an organisation does, is core to our values. We are currently rolling out an innovative programme of learning and support to social enterprises and community-based organisations called VEST! (Valuing the Extra Stuff!). This is funded by a grant from Devon and Cornwall Learning and Skills Council, the Baring Foundation and some of our own funds. We are working with partners in Scotland and Merseyside to bring this accredited programme to Devon for the first time. The VEST! Programme has generated interest for similar programmes in Somerset and Wales, with two mini versions of VEST about to commence in Somerset in May and June 2003.

Local Food Economy

We are a founder member, and were founding Company Secretary, of the South West Local Food Partnership (SWLFP) – a regional partnership of Local Food Links projects. We also set up and managed the Westcountry Community Food Links project, which was successful in its two years in promoting local food production and purchasing through practical work with producers and consumers in Devon. This project has now merged with Devon Food Links, which won the Soil Association's 2001 Award for Best Local Authority Supported Initiative.

2.4 Our Clients

We have a wide client base, many of which used our services repeatedly. Our clients have included:-

1. Somerset County Council

A Service Level Agreement to provide support to Social Enterprises equating to approximately 30 days support. This support included work with :-

- Ilminster Meeting House – assisting in developing a new business plan
- Stawley School – assisting in developing a new business plan
- West Somerset CVS - researching and writing a new business plan
- Langport Area Forum – incorporating the MCTi
- Street Self-Help – assisting in developing a new business plan
- Taunton East Action - setting a mission, aims and objectives with the new group

In addition we delivered **3 separate** Open College Network (OCN) Accredited **Business Planning Courses** (6 sessions each), in Yeovil, Hambridge and Taunton in Somerset.

2. Devon County Council A Service Level Agreement to do work which supports the Economic Development Strategy equating to approximately 20 days. 10 days of which were used on behalf of the **Wessex Reinvestment Trust** – writing a bid to Esmee Fairbairn Foundation for a capital sum for the revolving loan fund and revenue funding for a Local Food Links Officer – this has subsequently secured £150,000. Work also continued on the previous year's SLA which involved **delivery of bespoke training courses** of up to 10 full day sessions for groups in **Totnes and Teignmouth**.

3. Delivery of the **VEST** (Valuing the Extra Stuff!) **Social Audit Training**, funded by Devon and Cornwall Learning & Skills Council, Baring Foundation and CEU's own funds.

4. South West Regional Development Agency – SWRDA Acting as liaison officer(s) on behalf of the RDA with Holsworthy, Okehampton, Gt Torrington, Chagford & Hatherleigh Market & Coastal Town Initiatives (MCTi's). Support to and initial project appraisal of Community Initiative Fund (CIF) Survivor Bids in Calne, Wiltshire; Walcot East, Swindon and North Prospect, Plymouth.

5. Tamar Community Futures and Tavistock MCTi's – Consultancy with each to develop Steering Group Structure and Terms of Reference.

6. Blackdown Hills Area of Outstanding Natural Beauty – (AONB) work has included facilitating the annual review of their Business Plan; writing of the LEADER+ 3 year Action Plan and research into the potential of establishing a Development Trust in the Area.

7. North Devon AONB – Planning, facilitating and assisting in the writing up of a Management Plan Consultation event.

8. South West Protected Landscapes Forum – Planning, facilitating and assisting in the writing up of a Mission, Aims and Objectives and Work Plan priorities for the new Forum.

9. Totnes Development Trust – work to develop a Business Plan for the Town Mill Craft Centre Project and facilitation of meetings with the Trust and Totnes Community Strategy Group.

In addition we have worked with:-

- Development Trusts Association (DTA)*
 - Social Enterprises*
 - Food Links Projects*
 - Community Organisations, *
 - Development Trusts*
 - Voluntary Sector Partnerships
 - Single Regeneration Budget partnerships (SRB)
 - Sure-Start Initiatives*
 - Police Authorities
 - National Park Authorities
- *denotes current clients*

Some Stakeholder Definitions

We have a number of organisations that buy our services directly for their own purposes and others who contract our services for other, ultimate beneficiaries such as Devon and Somerset County Councils. In the questionnaires we used both terms customers and clients to mean the same thing. So to avoid confusion they will be consistently referred to as clients in these Accounts.

2.5 Partnerships & Memberships

Partnerships are those groups that we work with towards achieving common objectives. We are a founder member of the Devon Social Economy Partnership and sit on the Steering Group of the RISE Partnership (Regional Infrastructure for the Social Economy). We were an active member of DeLDAF (Devon Local Development Agencies Forum) until its cessation in March 2003. We are also members of the UK Social Audit Network (SAN)

In addition we have taken up membership of various organisations whose objectives we support or whose services we wish to subscribe to. During the reporting year CEU was a member of:-

- Co-operatives^{UK} (formerly Co-operative Union and ICOM)
- CBSN (Community Business Scotland Network)
- SWMCC (SW Mutuals and Co-op Council)
- NEF (New Economics Foundation)
- Associate member of Exeter Council for Voluntary Services.
- Exeter Scrapstore

We are about to re-join the Development Trusts Association as an Associate Member.

3 The Social Audit Scope & Methodology

The Social Audit year is from 1st April 2002 to the 31st March 2003, which brings it in line with our financial year. This will, eventually, enable us to produce the highlights of the two sets of accounts in one summary document, which will form our Annual Report. This should be available in late Summer.

Five out of our 6 objectives are being consulted on during this year. The five we chose, seemed most appropriate to external stakeholders.

44 different stakeholders were given the opportunity of being consulted, of which 29 gave their views. In addition, participants on all of our training courses were asked to evaluate the courses as we delivered them.

Being a very small organisation with only 2 full and 1 half time member of staff we agreed to share the work for the Social Accounting. The quantitative and factual evidence for the objectives was shared out amongst us by allocating different objectives against which to gather the evidence.

The design of different questionnaires was undertaken jointly by Helen and Debbie. Ali took care of emailing and posting them out, chasing up their return and carrying out the initial analysis of the completed questionnaires.

The first CEU Social Audit meetings were held on 12 and 24 July 2002, when we agreed the Social Audit year, the scope of the Audit, our Mission, Values, Objectives and Activities, and we undertook a stakeholder analysis.

4 Mission, Values, Objectives & Activities

Mission Statement:
The provision of a high quality training, information & support service to emerging and established social enterprises and our partners and other organisations operating within the social economy primarily in the South West Region.
Values:
Helping individuals realise their potential (through the work we do)
Supporting communities and groups to help themselves
Fairtrade
Treading lightly on the Earth
Collaborative partnerships – working imaginatively, innovatively, mutually i.e., with honesty and integrity
Encouraging innovation and flexibility
Striving for quality in what we do
Enjoying what we do and celebrating what we achieve
Supportive of our peer team

Objective 1: Supporting the development of social enterprises by	
1.1	delivering the VEST programme including the agreed outputs and timescales defined
1.2	providing a consultancy service that offers support tailored to the clients' needs.
1.3	delivering and/or brokering a minimum of 30 days of affordable, accessible and relevant training.
Objective 2: Working collaboratively to stimulate and support the local and regional social economy by	
2.1	being an active member of at least 3 partnerships whose remit includes the social economy.
2.2	seeking, with partners, to identify at least 2 different, innovative new ideas, creative solutions and methods for their implementation.
2.3	maintaining our practise of supporting local and social enterprises through our purchasing decisions.
Objective 3 : Continuously improving quality in all areas of the co-op's operations by	
3.1	developing and implementing policies and procedures in relation to our social, environmental, business and financial performance.
3.2	setting up a Social Audit system to monitor and evaluate our business, environmental, and social performance by 30 September 2002.
3.3	trialing improved financial management and reporting systems by end of December 2002, in order to change to the new system fully by the start of April 2003.
3.4	Seeking to work within the framework of the International Co-operative Alliance's recognised Co-op principles.
3.5	ensuring that staff have the necessary knowledge and training to fulfil their job functions.

Objective 4: Striving to be a fair and equitable employer through	
4.1	provision of satisfactory terms and conditions of employment to be reviewed January of each year.
4.2	setting up quarterly peer support and bi-monthly line management meetings by the 30 September 2002
4.3	development of an agreed staff appraisal system by end of March 2003 for implementation in the new financial year.
Objective 5: Operating within an equal opportunities framework by	
5.1	continuously reviewing our equal opportunities policy, incorporating best practice in all our operations, wherever possible
5.2	to put Equal Opportunities as a quarterly standing item on our internal meeting agendas
*Objective 6: To consolidate CEU's financial independence and sustainability through	
6.1	securing S.L.A.'s & grants to fund our core work.
6.2	developing a range of income generating products.
6.3	development of a diverse range of assets including a skilled team of associates engaged on a contract basis.
6.4	maximising the income generating potential of our consultancy services by developing a portfolio of training courses and support packages as our USP.
6.5	raising its profile through a programme of high quality and targeted marketing
6.6	securing 50% of our income through fee generating work.

*Please note that Objective 6 does not form part of the scope of this year's Social Audit.

5 Stakeholders - (Covering the period of April 2002 to March 2003)

5.1 Stakeholder Map

All stakeholders were initially identified. This list was then refined down to the key stakeholders to be consulted as part of the social accounts.

All Stakeholders	
Staff & their 'significant others' Helen, Debbie, Ali, Maria	Regulatory Bodies Inland Revenue Companies House
Clients/Trainees Devon County Council Somerset County Council Trainees Trainees + bespoke support Clients (community organisations) – bespoke support SWRDA – John Barkham, Sally Rackard Hannah Reynolds Devon Food Links Glastonbury SRB Blackdown Hills AONB North Devon AONB 3 Towns Training – Lesley & Andy Sure-start 3 Towns Training trainees Geoff Thomas	Suppliers Exeter CVS St Sidwells Centre St Leonards Paperchain Prontaprint Simpkin Edwards John Stedman/Heart of Devon Enterprise Agency Phone Co-op Landlord Co-ops UK
Associates Hannah Reynolds Caroline Rae Angie McTiernan Jenny Archard Sarah Taragon Dave Gardiner	Beneficiaries Taiko Ivy Project
Funders/Clients Devon County Council Somerset County Council Barings Foundation Learning and Skills Council	Partners West Dorset Food & Land Trust Deldaf Community Council Devon Co-Active Ltd SWLFP + Members + Christina DCC Development Trust Association Wessex Reinvestment Trust Tony Kerr WestDEN Community Fund

July 2002

5.2 Key Stakeholders to be consulted with for the Social Audit or who will have already completed training evaluations				
Clients		Clients		Trainees
1	WestDen – Caroline Rae/Kate Wright (R)	12	Tamar Community Futures – Jane Osborne	OCN: Hambridge – 9 Yeovil – 10 VEST: St Sids – 5 – Kim, Chris, Tony, Mandy, Jenny Torbay CCT – 1 Julian Ivy – 3 Lucy, Ray, Carol Magic C – 1 Rob DLCU – 2 Rob, Roy Cosmic – 2 Julie/Jenny? CEU – 1 Ali (Use existing data plus some) Successful Fundraising -) use Effective Meetings – TCF) existing Charing Skills - TCF) data 3 Towns trainees – existing Teignmouth – summary? Asset or Elephant – SCC – use existing data Totnes (CSG) Towns – Andy M and Lesley W
2	Alan Caldwell	13	Totnes Development Trust – Michael & Thena Kendall	
3	John Barkham	14	St Sidwells Centre – Alistair Mackintosh	
4	Somerset County Council (SCC) – Mike Atkinson	15	Cullompton MCTI – Gerard Edwards	
5	South West Regional Development Agency (SWRDA) - Community Initiative Fund – Les Roper & Sally Rackard	16	Tamar Community Futures/AONB – Tim Selman	
6	Devon Food Links – Jonathon Smye	17	South West Protected Landscape – Dave Dixon	
7	Hannah Reynolds Associates (East Dean, Bude) (R)	18	Bovey Tracey Community Centre Trust – David Risdon	
8	Glastonbury SRB6 – Evelyn Rideout	19	Tavistock MCTI – Gretta Madigan	
9	SWRDA - Market & Coastal Towns Initiative (MCTI) Workshop – Cherida Fletcher	20	SCC – Ilminster Meeting House – Peter Lansdown	
10	Blackdown Hills Rural Partnership Business Association - Andrew Lovering	21	Stawley School – Alex Simpson	
		22	West Somerset CVS – Graham Sutton	
11	Blackdown Hill Rural Partnership - Lynne Kettles and Sarah Cookson	23	Langport Area Forum – Paul Heim	
		24	Street Self-Help – Ann Dixon	
		25	Taunton East Action – Paul Chadwick	
		26	Chagford MCTI – Terry Bleakman	
		27	ND AONB – Andy Bell	

	Funders		Co-tenants		Associates
28	Devon & Cornwall Learning & Skills Council – Neil Roberts Baring Foundation	32	South West Local Food Partnership – Phil Cookson Devon Development Education – Sue Errington	39	Hannah Reynolds (R) Caroline Rae (R) Dave Gardiner
29		33		40 41	
	Partners		Partners/Clients		Staff & former employees
30	Train 2000 – Lisa McMullan Community Business Scotland Network Ltd – John Pearce	34	Co-active – Sue Morrish	42	Alison Randall Debbie Stewart Helen Vines
31		35	Devon County Council – Ian Derbyshire	43	
		36	Somerset County Council – Mike Atkinson	44	
		37	Somerset Food Links – Paul Sander-Jackson		
		38	Wessex Reinvestment Trust – Bob Patterson		

(R) = Repeat category stakeholder

5.2 Key Stakeholders

We identified who our stakeholders are at a team Social Audit meeting having firstly identified the various Stakeholder categories. Once we had the complete picture we then looked at who we had engaged with in a significant enough way during the reporting year in order for them to be able to make a meaningful contribution to the Audit.

Organisations undertaking the accredited VEST and Business Planning programme/courses were *not* included in the consultations as clients, but trainees from those organisations were consulted as trainees, in terms of course delivery. In future, when gathering stakeholders' views, we will seek to distinguish between such organisations as clients, and the individuals from the organisations who may be trainees.

5.3 Stakeholder Omissions

Suppliers

We have omitted suppliers from our list having looked at each one and concluded that apart from providing us with accommodation or other services such as accountancy or recycling collections none of those listed would be able to comment on many of the questions being posed.

Beneficiaries

The beneficiaries, namely the Taiko Drumming Group, which Helen is a part of and the Ivy Project have benefited in a fairly peripheral way. Taiko were able to order some display panels cheaply through our suppliers but have returned the favour by allowing us use of their van to collect some bulky furniture.

Ivy was able to get on to the VEST training and gain a trustee in the shape of Debbie. Ivy will have completed training evaluations as part of the training and it was considered that this was the more important element of our work to pick up on rather than activity outside of our normal work.

Associates

Only three of our associates have done any work during the period so the others have not been consulted this year.

Social Accounting Plan

We drew up a fairly comprehensive and with hindsight, over ambitious Plan for our Social Accounting but unfortunately we were unable to follow it in the way we had intended. Delays in getting our website developed meant that we were unable to monitor hits / visits to it. We had also intended to have an independent facilitator carry out interviews with various key stakeholders such as partners but we were not able to organise this in time for the consultation to be done in any other way than through questionnaires. This is something we wish to address in the coming year.

6. The Social Audit

6.1 Social book-keeping

We started our Social Audit Book-Keeping Plan in September 2002 and on 25th September we had a meeting to discuss the plan and agree amendments. Our Social Audit Book-keeping plan was finally agreed at a Board Meeting on the 18th February 2003 based on the example in the workbook. The plan looks at what information is required against each activity and the possible method of gathering. Against this we added two columns to show who would have the responsibility of gathering the data and when / how often this needed to happen. The plan can be seen at Appendix 1 in A3 format.

6.2 Stakeholder consultations

Having determined who our key stakeholders are we then devised questionnaires for all of the groups except for trainees. This was because trainees' opinions on the quality of the training they'd received had been gathered on an ongoing basis throughout the year.

We ended up producing 7 different questionnaires to cover the following categories:-

1. clients
2. partners
3. partners/clients
4. funders
5. associates
6. staff
7. co-tenants

Staff were the only stakeholder group asked to comment in detail on the activities as we realised that few others would be in a position to know whether we had achieved them, particularly those relating to internal activities. All stakeholders were asked how they felt we had performed against our stated mission, values and objectives.

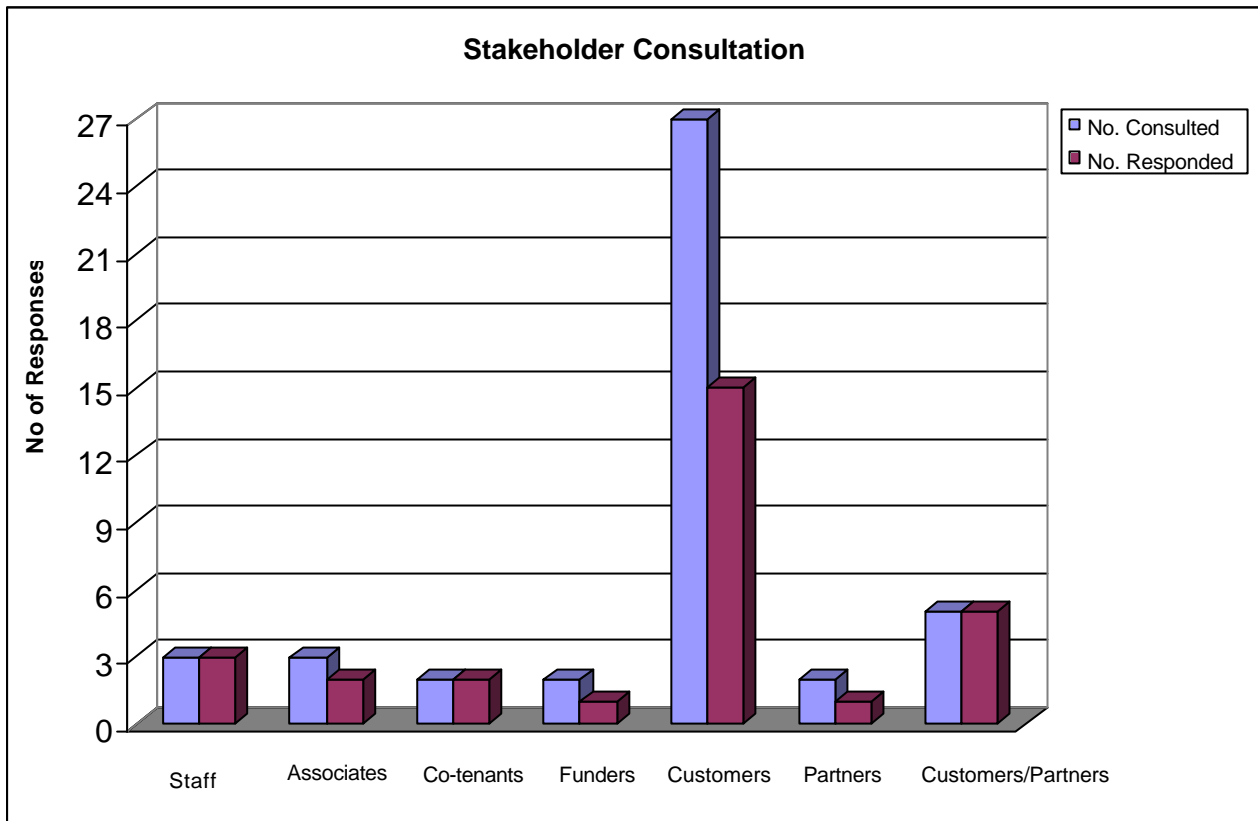
Apart from the mission, values and objectives each stakeholder category had their own relevant questions to respond to. The questionnaires can be seen as Appendices to this report.

For details on the numbers of stakeholders consulted compared to the responses received see **Chart 1** on the following page (page 16). **Chart 3**, on Page 26, shows a breakdown of the services our clients received during the year.

Please note that all comments shown in quote marks, italics or boxes are replicated exactly from the questionnaires returned. No editing has taken place except to make them anonymous if something has been said which identifies the respondent.

6.3 Social Accounting Plan

It should be noted that we were unable to keep to the plan due to pressures of work and have ended up having to 'cram' – something we wish to avoid for our own sanity next time round.



Stakeholder	No. Consulted	No. Responded	Percentage response rate
Staff	3	3	100%
Associates*	3	2	67%
Co-tenants	2	2	100%
Funders	2	1	50%
Customers*	27	15	56%
Partners	2	1	50%
Customers/Partners	5	5	100%
Total	44	29	66%

* two Associates were sent both an Associate and Customer questionnaire and only one replied to both questionnaires (see (R) in 5.2 "Key Stakeholders to be consulted....." table

Chart 1

7 Analysis of the Social Accounts

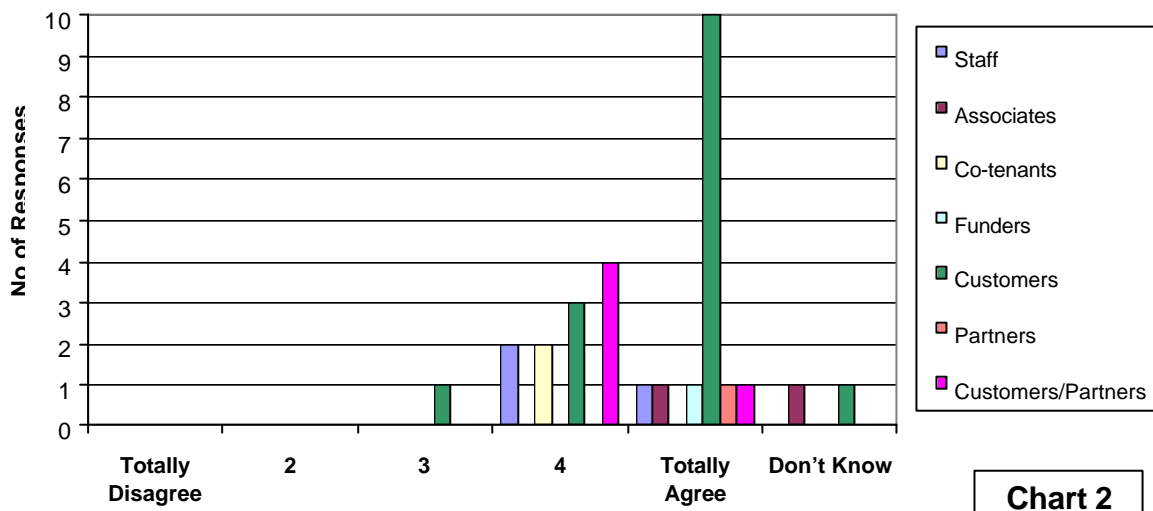
Please note: Not all respondents answered every question, hence the disparity in the numbers of answers to each section.

Mission Statement:

'The provision of a high quality training, information & support service to emerging and established social enterprises and our partners and other organisations operating within the social economy primarily in the South West Region'.

All stakeholders were consulted as to how they felt we had performed against our mission.

As can be seen from Chart 2 out of the 29 responses received from all stakeholder categories, concerning how well we live up to our Mission Statement, 88% either strongly (4) or totally (5) agreed that we do! Only 2 didn't know and 1 was neutral, marking it as (3).



Values:

Respondents marked a scale reflecting their opinion on how well they thought CEU has lived up to its mission and values over the year.

Table 1

• **Helping individuals realise their potential (through the work we do)**

	Totally Disagree				Totally Agree	Don't Know
	1	2	3	4	5	
Staff	-	-	-	XX	X	-
Associates	-	-	-	-	X	X
Co-tenants	-	-	X	X	-	-
Funders	-	-	-	-	-	X
Clients	-	X	XX	XX	XXXXX	XXX
Partners	-	-	-	-	X	-
Clients/Partners	-	-	X	XX	X	X

Two clients didn't answer the above question

• **Supporting communities and groups to help themselves**

	Totally Disagree				Totally Agree	Don't Know
	1	2	3	4	5	
Staff	-	-	-	XX	X	-
Associates	-	-	-	-	X	X
Co-tenants	-	-	-	X	-	X
Funders	-	-	-	-	X	-
Clients	-	-	XX	XXXXXX	XXXXX	XX
Partners	-	-	-	-	X	-
Clients/Partners	-	-	X	X	XX	X

• **Supporting Fairtrade**

	Totally Disagree				Totally Agree	Don't Know
	1	2	3	4	5	
Staff	-	-	-	XX	X	-
Associates	-	-	-	-	-	XX
Co-tenants	-	-	-	X	X	-
Funders	-	-	-	-	-	X
Clients	-	-	-	X	XXX	XXXXX XXXXX
Partners	-	-	-	-	X	-
Clients/Partners	-	-	-	X	-	XXXX

One client didn't answer the above question

- **Treading lightly on the Earth**

	Totally Disagree				Totally Agree	Don't Know
	1	2	3	4	5	
Staff	-	-	X	X	X	-
Associates	-	-	-	-	-	XX
Co-tenants	-	-	-	XX	-	-
Funders	-	-	-	-	-	X
Clients	-	-	-	-	XXX	XXXXX XXXXX X
Partners	-	-	-	-	X	-
Clients/Partners	-	-	-	-	-	XXXXX

One client didn't answer the above question

- **Collaborative partnerships – working imaginatively, innovatively, mutually ie, with honesty and integrity**

	Totally Disagree				Totally Agree	Don't Know
	1	2	3	4	5	
Staff	-	-	X	X	X	-
Associates	-	-	-	-	XX	-
Co-tenants	-	-	-	X	X	-
Funders	-	-	-	-	X	-
Clients	-	-	X	XXX	XXXXX XXXXX	-
Partners	-	-	-	-	X	-
Clients/Partners	-	-	-	XXX	X	X

One client didn't answer the above question

- **Encouraging innovation and flexibility**

	Totally Disagree				Totally Agree	Don't Know
	1	2	3	4	5	
Staff	-	-	XX	-	X	-
Associates	-	-	-	X	-	X
Co-tenants	-	-	-	-	X	X
Funders	-	-	-	-	-	X
Clients	-	-	XXXX	XXXX	XXXXX	X
Partners	-	-	-	-	X	-
Clients/Partners	-	-	X	XX	X	X

One client didn't answer the above question

- **Striving for quality in what we do**

	Totally Disagree				Totally Agree	Don't Know
	1	2	3	4	5	
Staff	-	-	-	XX	X	-
Associates	-	-	-	-	X	X
Co-tenants	-	-	-	X	X	-
Funders	-	-	-	-	X	-
Clients	-	-	XX	XX	XXXXX XXXX	X
Partners	-	-	-	-	X	-
Clients/Partners	-	-	-	XX	XX	X

One client didn't answer the above question

- **Enjoying what we do and celebrating what we achieve**

	Totally Disagree				Totally Agree	Don't Know
	1	2	3	4	5	
Staff	-	-	X	XX	-	-
Associates	-	-	-	-	X	X
Co-tenants	-	-	-	XX	-	-
Funders	-	-	-	-	X	-
Clients	-	-	XX	XXXXX	XXXXX XX	-
Partners	-	-	-	-	X	-
Clients/Partners	-	-	-	XXX	X	X

One client didn't answer the above question

- **Supportive of our peer team**

	Totally Disagree				Totally Agree	Don't Know
	1	2	3	4	5	
Staff	-	-	-	XX	X	-
Associates	-	-	-	-	XX	-
Co-tenants	-	-	-	X	X	-
Funders	-	-	-	-	-	X
Clients	-	-	-	XXX	XXXXX X	XXXXX
Partners	-	-	-	-	X	-
Clients/Partners	-	-	-	X	XX	XX

One person didn't answer the above question

Values

As values are a very personal thing to those who subscribe to them they would not be something we would necessarily seek to change as a result of the opinions of others. However, it is very reassuring to see that our clients consider that we have been either very successful (VS) or successful (S) in living up to our values of:-

‘Supporting communities and groups to help themselves’ (VS = 38%), (S = 38%)

‘Collaborative partnerships – working imaginatively, innovatively, mutually ie, with honesty and integrity’ – (VS = 83%), (S = 8%)

and ‘Striving for quality in what we do’ - (VS = 75%), (S = 8%)

Our values of **‘Supporting Fairtrade’** and **‘Treading lightly on the earth’** are something that we have practised during the year. However, judging by the high percentage of respondents who’ve reflected that they don’t know how successful we’ve been in living up to these values 67% & 75% of clients respectively, we obviously need to do more to promote our activities in this area.

‘Enjoying what we do and celebrating what we achieve’ needs more work on as far as the staff team are concerned for us to totally agree that we’ve satisfied this value but the following quote from a staff response goes some way to explaining why-

“It’s great working for CEU, I really enjoy it – even though sometimes it feels like there is just too much to do!!”

Clients also gave overall positive feedback on their views of engaging with us.

“Not much more to add. As a Partnership and as individuals we enjoy working with the CEU team – we find that not only do we benefit from a professional and “can do approach” and delivery to contracts – we also have fun working with them... much appreciated from all here, both in the staff team and importantly from the members of the community and partnership beyond”

As we would hope, the staff and associate team were either totally in agreement (5) or strongly in agreement (4) that we were **‘Supportive of our peer team’**. Interestingly 50% of our clients felt that they knew enough about CEU and how we work to “totally agree” that we live up to this value.

Objectives and Activities

When setting our Objectives and Activities we were careful to try and quantify exactly how we would achieve our overall mission whilst reconciling ourselves to the commitments we were already signed up to contractually.

As stated on page 15, staff are the only stakeholder group asked to comment on the detailed activities as the other stakeholders wouldn’t have enough information to be able to make a meaningful response. This in itself has led us to the conclusion that our objectives and activities for the new reporting year need to be revised in order to be able to seek wider views.

Objective 1: Supporting the development of social enterprises by

1.1 delivering the VEST programme including the agreed outputs and timescales defined.

VEST (Valuing the Extra Stuff) is an 18 month programme of training and bespoke support in Social Accounting and Auditing (SA) targeted at social enterprises in Devon. VEST is funded through the Devon & Cornwall Learning and Skills Council, the Baring Foundation and CEU's own funds.

VEST Aims:

- ❑ Increasing the personal skills and professional development of participating individuals:
- ❑ Increase awareness amongst existing and fledgling community enterprises of the value of monitoring and evaluation (M & E), specifically Social Auditing
- ❑ Strengthen the capacity of rural community businesses and to become more viable through effective M & E (ie. Social auditing)

Target outputs can be seen below against those achieved/expected by the end of the programme. As part of the VEST programme a full evaluation of the programme will be carried out over the summer months, involving key stakeholders.

Quantitative Targets	Actuals/Expected
1 VEST pilot programme organised and delivered	Achieved
2 taster sessions advertised and run	2 sessions advertised, 1 taster session run (9 attendees) and 1 one-to-one meeting (COSMIC) delivered
Delivery of 1 Training the Trainers Package	Achieved
16 learners engaged from 8 participating organisations (plus CEU)	13 learners from 7 organisations (inc. CEU) have engaged in some or all of the VEST programme. 5 participants changed jobs and moved on. Their organisations have continued with the programme.
16 x OCN level 3 portfolio submissions	8 portfolios expected (inc.3 from CEU: 1 participant and 2 trainers)
8 sets of social accounts produced	6 sets of accounts expected
10 action learning sessions for VESTies	9 delivered to date, 10 th planned
6 articles highlighting social auditing/VEST	3 articles achieved. 3 planned to celebrate VEST and launch of VESTies' accounts.
9 days bespoke support per VEST organisation	Approx 25 days delivered up to end of March. More currently being delivered.

The quantitative targets tell only part of the story. The range of participants on the VEST programme (VESTies) has ensured a cross-fertilisation of ideas, sharing of experiences and peer support. The VESTies are:

- **Devon Lane Credit Union (DLCU)** – Credit Union providing low cost financial services across much of South Hams and West Devon area. (DLCU has not produced social accounts but 1 DLCU participant has attended all the training sessions and wishes to apply his learning to another organisation he volunteers with.)
- **IVY Project** – a youth volunteering and skills building organisation, based in Exeter.
- **Magic Carpet** – a community based organisation offering creative and therapeutic activities to people with a variety of needs, based in Exeter.
- **Project COSMIC** – a pioneering IT Training and Webdesign social enterprise based in Ottery St. Mary
- **St. Sidwell’s Healthy Living Centre** – UK’s first Healthy Living Centre, Exeter.
- **Torbay Coast & Countryside Trust (TCCT)** – an environmental company working with local communities, providing volunteering opportunities and promoting sustainable environmental management in the Torbay area.
- **CEU** – Alison is attending as a participant. All 3 CEU staff will be submitting portfolios seeking accreditation.

CEU has also linked the VESTies into the UK Social Audit Network, thus broadening the social auditing context for them and enabling them to network directly with similar organisations addressing similar issues. COSMIC have recently been accepted as an example of Best Practice for the DTI IUKE (Investment in UK Enterprise) programme. Their co-ordinator (and VESTie) is convinced that one of the reasons for their success in this was their commitment to social auditing.

Summary of learners’ quantitative evaluation of Training Sessions

Session Number	Number of learners	Evaluations returned
1	7	7
2	8	8
3	8	8
4	7	6
5 recall session, not evaluated		
6	8	5
7	9	5
8	8	5
9 recall session, not evaluated		

Length of sessions:

Too short	Just right	Too long	Nil
1	30	1	7

NB Not everyone completed every question

Rate the following	Excellent (1)	(2)	OK (3)	(4)	Poor (5)
<i>Explanation of the subject</i>	20	22			
<i>Quality of visuals and handouts</i>	17	21	4	1 (sess. 4)	
<i>Usefulness of the training to you</i>	26	16		1 (sess. 4) 1 (sess. 7)	
<i>Trainers' Approaches</i>	25	19			
<i>Location</i>	15	19	10		
<i>Venue & Facilities</i>	16	19	7	2 (St Leonards)	

Summaries of each sessions' evaluations can be viewed at CEU's offices. Overall additional comments made in terms of "what was most useful" and the "learning gained" illustrates the learners' growing confidence and belief that they could achieve social accounts and an increased recognition of the value of the social auditing process.

"good friendly atmosphere which makes it easier to be able to participate"

"Best, most useful day so far (session 7), I could see that this was containable and achievable!"

"The training continues to be of an excellent standard with much being learnt by both me and my company!"

We tried to ensure variety during the sessions. Particularly well received elements were visits to VESTies' organisations, a visit from a speaker who had done social auditing before, and practical demonstrations (everything from "who wants to be a millionaire" automated answer handsets to whizzy IT gadgets to make worklife, and social auditing, easier).

"The real demonstrations of evaluation techniques were good fun and enlightening – thank you!"

"Listening to Camilla from Artshape and her advice and opinion on having been through the Social Audit was invaluable. Whilst the tutors are brilliant at helping us through the process, it is never the same as listening to someone who has done it for real."

The VESTies are committed to continuing the social auditing they have introduced but recognise the need for future support. We hope that this can be provided through a mix of peer support and resourced CEU support.

In addition to the quantitative targets and achievements, VEST has had the effect of raising the profile of Social Auditing in parts of the South West. Workshops have been

delivered for National Institute of Adult Continuing Education (England and Wales) and others are planned for an Adult and Community Learning Partnership in Gloucestershire, and for the South West Development Trust Association's Regional meeting in June 2003. As a direct result of the VEST programme, we are now engaged in 2 new "trimmed down" versions of VEST in Somerset, one focussing on Food and Healthy Eating Projects and the other on Social Enterprises. We have also given advice to a consultant in Wales in preparation for a report advocating the take up of social auditing by social enterprises in South Wales.

1.2 providing a consultancy service that offers support tailored to the clients' needs.

During the year we have delivered consultancy to a range of clients in the forms of short-term pieces of work, preparing and delivering bespoke training sessions, repeat business and larger contracts through Service Level Agreements. See Page 6 & 7 for a break down of the clients and clients worked with during the year.

In all cases we have responded to the briefs set by the client which have varied greatly from facilitating and guiding members of community organisations in producing business plans, to delivering training and in exceptional circumstances, writing a plan to help a client in crisis.

1.3 delivering and/or brokering a minimum of 30 days of affordable, accessible and relevant training.

Objective / Activity Target	Activity	Actual Days	as a %
1.3 delivering and/or brokering a minimum of 30 days of affordable, accessible and relevant training	□ 3 x OCN Business Planning courses in Somerset (3 x 6 days)	18	
	□ 3 Town's Training	10	
	□ 4 days in Teignbridge	4	
	□ Introduction to Social Auditing for Sure Start	1	
	□ Effective Chairing Skills for Tamar Community Futures	½	
	□ Appraiser Training for Blackdown Hills Rural Partnership	2	
		35 ½	118%

Qualitative

Respondents marked a scale, which reflected their opinion as to how well they think CEU has lived up to its **Objective 1** over the last year. **N.B. Only CEU staff were consulted on individual activities.**

	Strongly Disagree	2	3	4	Strongly Agree	Don't Know
Staff						
Activity 1.2: delivering the VEST programme including the agreed outputs and timescales defined	-	-	-	XXX	-	-
Activity 1.3: providing a consultancy service that offers support tailored to the clients' needs.	-	-	-	XX	X	-
Activity 1.4: delivering and/or brokering a minimum of 30 days of affordable, accessible and relevant training.	-	-	-	X	XX	-
Associates	-	-	-		X	X
Co-tenants	-	-	-	XX		-
Funders	-	-	-		X	-
Clients	-	-	-	XXXXX	XXXX	XXXXXX
Partners	-	-	-	-	X	-
Clients/Partners	-	-	-	X	XXX	X

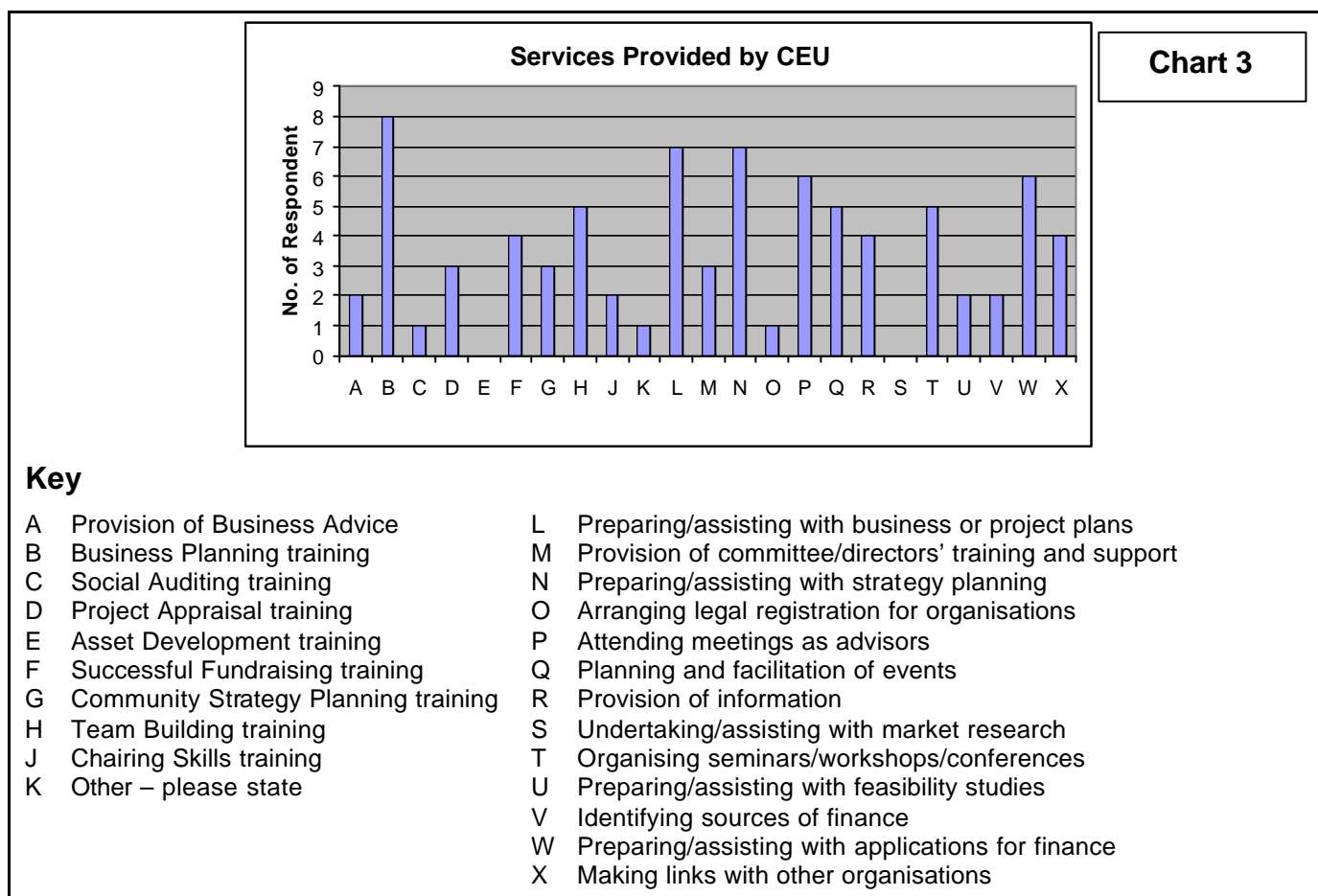
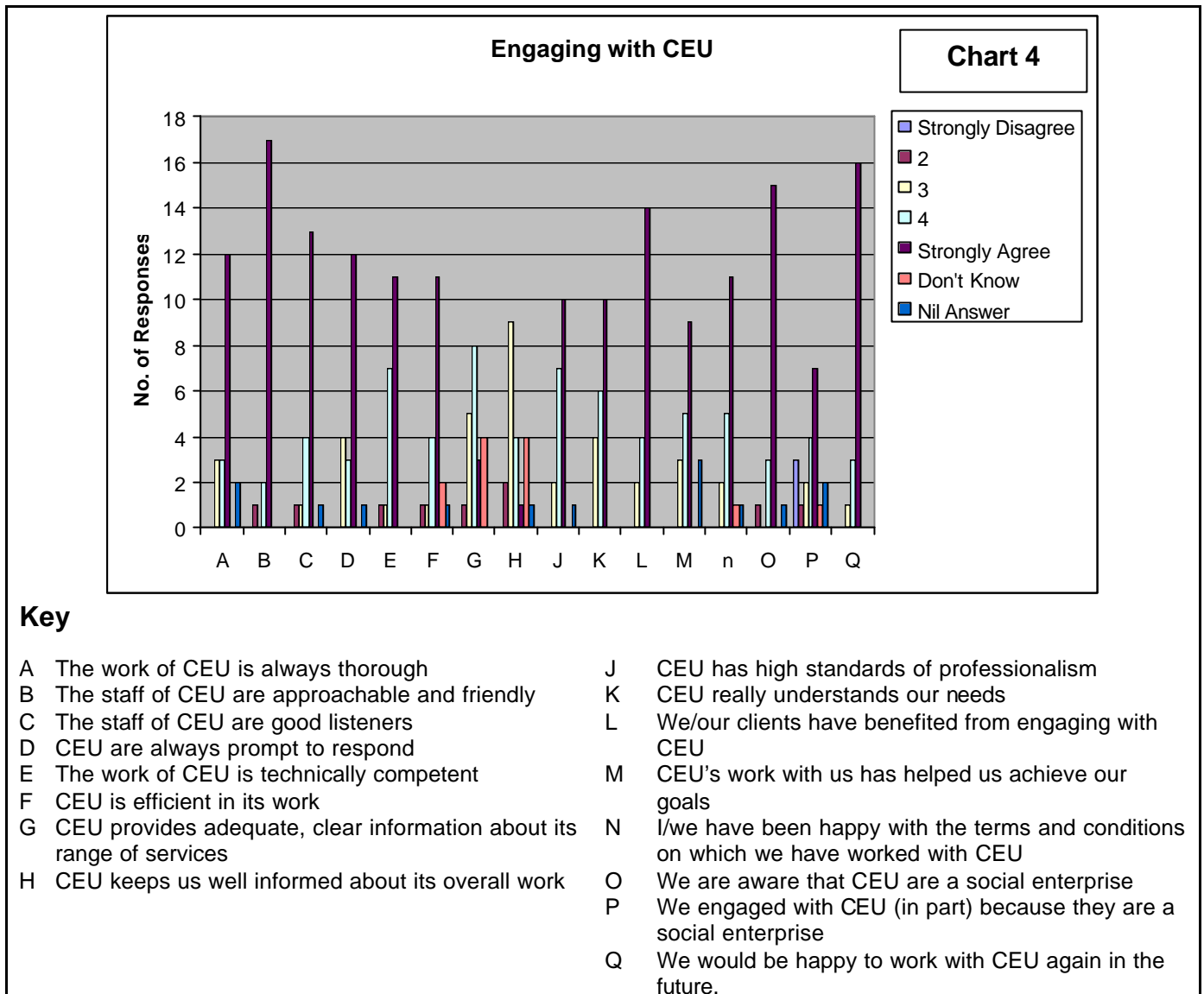


Chart 4 below shows how our clients ranked the different statements about the standard and effectiveness of our work with them.



Whilst 62% of our clients considered we had either been very successful (5) or successful (4) in achieving this overall objective it is of concern to note that 38% don't know. Again, this shows that we need to give people the information through publicity, both written and on our website, which they can then base an opinion on.

“CEU are very talented people. They have the ability to help focus groups ensuring everyone feels they have contributed but ensuring no one voice is dominant. Their expertise is exceptional in many ways and (they) always respond quickly. They are realistic in terms of capacity from their own organisational management and in helping groups develop”. (customer feedback)

It should be noted that there were no negative or neutral assessments of our performance under this objective.

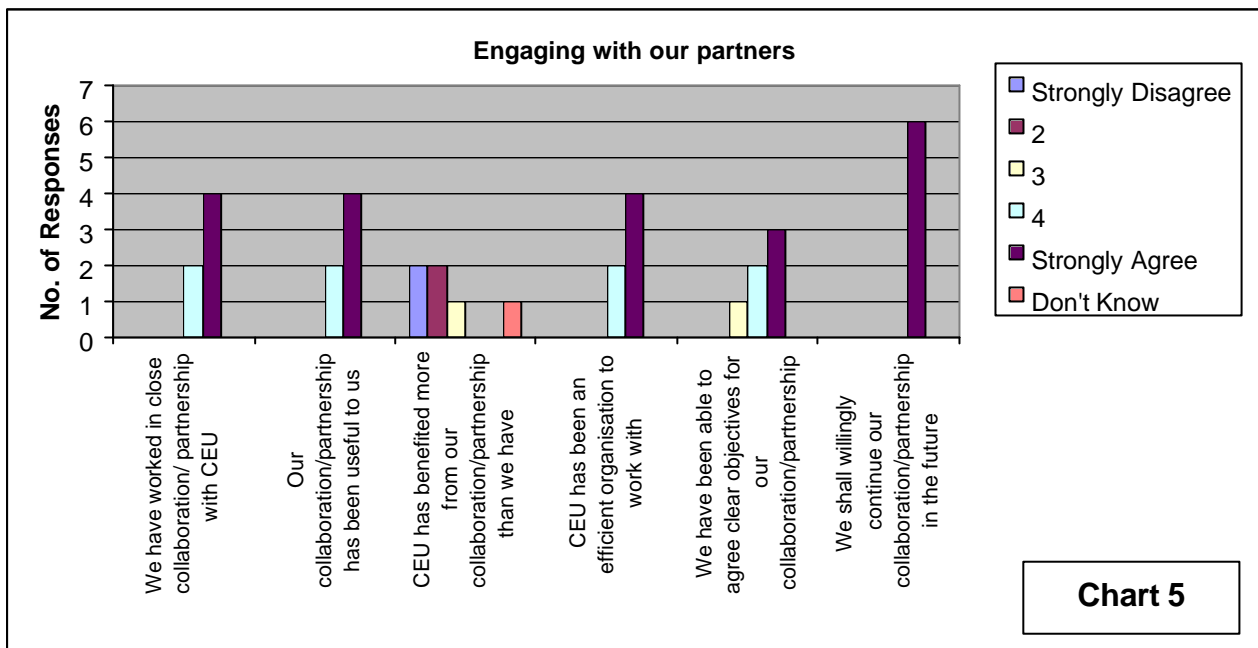
Objective 2: Working collaboratively to stimulate and support the local and regional social economy by

2.1 being an active member of at least 3 partnerships whose remit includes the social economy.

Objective / Activity Target	Activity	Actual	as a %
2.1 being an active member of at least 3 partnerships whose remit includes the social economy.	<ul style="list-style-type: none"> ❑ Devon Social Economy Partnership (DSEP) (4 meetings attended) ❑ Wessex Reinvestment Trust (5 meetings attended) ❑ Regional Infrastructure for Social Enterprise (RISE) - (only 1 meeting held and attended but email consultation engaged in) 	3	100%

2.2 seeking, with partners, to identify at least 2 different, innovative new ideas, creative solutions and methods for their implementation.

Objective / Activity Target	Activity	Actual	as a %
2.2 seeking, with partners, to identify at least 2 different, innovative new ideas, creative solutions and methods for their implementation.	<ul style="list-style-type: none"> ❑ Terms of Reference devised for Tamar Community Futures Market and Coastal Towns Initiative which became widely replicated as a model of good practice. 2 workshops were delivered on the process for SWRDA. ❑ 3 Towns Training materials developed with Coactive and significantly adapted for the specific needs of Teignbridge and Totnes local partnerships 	2	100%



The chart above shows how our partners ranked the various statements on the Partners' questionnaires in terms of our role as a partner organisation.

2.3 maintaining our practise of supporting local and social enterprises through our purchasing decisions.

During the year we have used Exeter CVS for much of our VEST training (as well as St Sidwell's Healthy Living Centre, St Leonard's Church and Project Cosmic's training room) and have started using their photocopying services instead of our previous suppliers who were not local or a social enterprise.

We have continued to use Paperchain's paper recycling services (a local co-op) during the year and have purchased more recycling boxes from them.

Qualitative

Respondents marked a scale, which reflected their opinion as to how well they think CEU has lived up to **Objective 2** over the last year. **N.B. Only CEU staff were consulted on individual activities.**

	Strongly Disagree	2	3	4	Strongly Agree	Don't Know
Staff						
Activity 2.2: <i>being an active member of at least 3 partnerships whose remit includes the social economy.</i>	-	-	X	XX	-	-
Activity 2.3: <i>seeking, with partners, to identify at least 2 different, innovative new ideas, creative solutions and methods for their implementation</i>	-	-	X	XX	-	-
Activity 2.4: <i>maintaining our practise of supporting local and social enterprises through our purchasing decisions</i>	-	-	X	XX	-	-

Associates	-	-	-	X	-	X
Co-tenants	-	-	-	X	-	X
Funders	-	-	-		X	
Clients	-	-	X	XX XX X XX XX	XX	XXX
Partners	-	-	-	-	X	-
Clients/Partners	-	-	-	XX	XX	X

Again we have fared well in the responses to this objective with 70% of our clients deeming us as very successful or successful in meeting it.

A very positive comment was received from an associate as follows:-

"Always seems to us you are an example of excellence in what you do".

We still have some work to do in terms of sharing the full scope of what CEU does and how. This comment from an associate and customer illustrates gaps in people's knowledge of us.

"Sorry to be so "don't know" but that's the reality. We work collaboratively on pieces of work, but as I went through (questionnaire) I realise I know little about how your work, although I'm obviously highly supportive of anything you do!" (associate and cliwnr feedback)

One customer also highlighted an issue we are conscious of and are already working to address.

"There have historically been some issues where because of unclear commissioning and contractual lines, an element of misunderstanding has crept into relationships – not directly as far as we are concerned but with partnerships which we have been involved in. Clear terms of trade, which are on the table, would help address this. There are perhaps dangers inherent in trading with people who are well known to you personally!" (client/partner feedback)

Objective 3: Continuously improving quality in all areas of the co-op's operations by

3.1 developing and implementing policies and procedures in relation to our social, environmental, business and financial performance.

Our environmental policy is included as [Appendix 2](#) along with our equal opportunities policy as [Appendix 10](#). We had proposed to have equal opportunities as a standing agenda item but failed to do this during the reporting year. It is now included as item 4. Policies, to pick up on equal opportunities and our other policies in the future.

Further policies have been developed but outside of the reporting year and will be reported on in the next Social Audit Report.

3.2 setting up a Social Audit system to monitor and evaluate our business, environmental, and social performance by 30 September 2002.

We committed to undertake a Social Audit as part of the VEST training programme (see Objective 1.1) as far back as July 2001 when we first bid to the Learning & Skills Council. Our own Social Audit became a standing agenda item at Team Meetings as of 10th July 2002 and also on our Board Meetings, since the first one was held on 17th December 2002. The Social Audit Plan wasn't finally agreed until the 18th February, which is indicative of how we had started to fall behind with our own book-keeping systems.

3.3 trialing improved financial management and reporting systems by end of December 2002, in order to change to the new system fully by the start of April 2003.

Debbie undertook training in a new financial package however fulfilling this objective fell by the wayside and on reflection was overly ambitious in terms of our other commitments for the reporting year. A new deadline has been set to undertake this during the current year.

3.4 seeking to work within the framework of the International Co-operative Alliance's recognised Co-op principles.

These are:-

1. Voluntary and open membership
2. democratic member control
3. member economic participation
4. autonomy and independence
5. education, training and information
6. co-operation among co-operatives
7. concern for community

1 - doesn't apply in its entirety to Worker Co-operatives like ours, who's Memorandum and Articles states that all members are workers and all workers are members. We comply with the Memorandum & Articles of Association.

2, 3, 4, 6 & 7 - we fully meet and we are working to improve our performance on 5.

Principle 6 can be evidenced by consideration of the fact that we have invested £500 in fee and travel and 6 staff days in attending the UK Co-op Council's & Suma Whole-food's 25th birthday conference in Huddersfield in order to become more aware of what other co-operatives are doing. We have also attended the Co-operative Futures Conference staged by the Co-op Party & started to work with the Co-op Group to organise a conference around Social Enterprises later in this year.

3.5 ensuring that staff have the necessary knowledge and training to fulfil their job functions.

The following shows the summary of responses from the 3 staff against this objective.

“In the past year I have received the following amount of training”

0 days	<1 day	1 day	2-5 days	more than 5 days
			xx	x

	1	2	3	4	5	N/A
Since joining CEU I have received the training I need to do my job effectively			xx		x	
The training I have received was worthwhile			x	x	x	
The staff appraisal and feedback system is good		x		x		x

Comments:

I think I've just had one day's training on a Book-keeping system but I'll double check!?! The training I've had since joining CEU has been worthwhile but I could do with updating my skills and knowledge and am keeping an eye out for something appropriate, a bit more local and affordable. I know that if I find it my peers will support me in doing it – time and resources permitting. Hopefully RISE might help!

We have yet to develop and fully implement a formal peer appraisal and feedback system but will be doing this in the new year.

When I joined CEU I was given an excellent induction, the best I have had from any previous employer!

I have line management meetings but recently, due to volume of work this hasn't happened as regularly as it should.

We need to sort out some sort of regular appraisal system. As a small team we provide regular informal feedback to each other which works well, up to a point. Training needs tend to be identified as they arise. However we have no system in place for training needs analysis and training review.

Training does not necessarily need to be courses but we consistently struggle to find time for study leave, to attend seminars/conferences and read books etc. to widen our learning and experience.

Qualitative

*Respondents marked a scale, which reflected their opinion as to how well they think CEU has lived up to **Objective 3** over the last year. N.B. Only CEU staff were consulted on individual activities.*

	Strongly Disagree	2	3	4	Strongly Agree	Don't Know
Staff						
Activity 3.2: <i>developing and implementing policies and procedures in relation to our social, environmental, business and financial performance</i>	-	-	x	x	x	-
Activity 3.3: <i>setting up a Social Audit system to</i>	-	-	-	xx	-	-

<i>monitor and evaluate our business, environmental, and social performance by 30 September 2002</i>				X		
<i>Activity 3.4: trialing improved financial management and reporting systems by end of December 2002, in order to change to the new system fully by the start of April 2003.</i>	X	X	X	-	-	-
<i>Activity 3.5: seeking to work within the framework of the International Co-operative Alliance's recognised Co-op principles.</i>	-	-	XX	-	X	-
<i>Activity 3.6: ensuring that staff have the necessary knowledge and training to fulfil their job functions.</i>	-	-	XX	-	X	-
Associates	-	-	-	-	-	XX
Co-tenants	-	-	-	X		X
Funders	-	-	-		-	X
Clients	-	-		XX X	-	XXXXX XXXXX XX
Partners	Not asked					
Clients/Partners	-	-	X	X	XX	X

With hindsight this question should probably have only been addressed to staff and associates as it is clear from the responses that none of the stakeholders, other than staff, really know how we are performing against this objective. The associates need to be better informed if even they are to be able to comment in an informed way in future.

Objective 4: Striving to be a fair and equitable employer through

4.1 provision of satisfactory terms and conditions of employment to be reviewed January of each year.

Must try harder! We did not manage to review pay until after the reporting year. Other conditions have not been reviewed as yet.

4.2 setting up quarterly peer support and bi-monthly line management meetings by the 30 September 2002.

Bi-monthly line management meetings for our newest member of the Co-op started off well and were monthly so a target of 6 was met, however they have petered out a bit lately due to the pressure of time.

4.3 development of an agreed staff appraisal system by end of March 2003 for implementation in the new financial year.

Not met yet! One for next year!

Qualitative

Respondents marked a scale, which reflected their opinion as to how well they think CEU has lived up to **Objective 4** over the last year. **N.B. Only CEU staff were consulted on individual activities.**

	Strongly Disagree	2	3	4	Strongly Agree	Don't Know
Staff						
Activity 4.2: provision of satisfactory terms and conditions of employment to be reviewed January of each year.	-	-	X	-	X	X
Activity 4.3: setting up quarterly peer support and bi-monthly line management meetings by the 30 September 2002.	-	XX	-	X	-	-
Activity 4.4: development of an agreed staff appraisal system by end of March 2002 for implementation in the new financial year.	X	X	-	X	-	-
Associates	-	-	-	-	-	XX
Co-tenants	-	-	-	-	X	X
Funders	-	-	-	-		X
Clients	Not asked					
Partners	Not asked					
Clients/Partners	Not asked					

Another internally focussed objective that is only relevant to staff and possibly funders! **As already picked up on page 30 there is quite a bit to be done to meet our aspirations in the coming year.**

"When I joined CEU I was given an excellent induction, the best I have had from any previous employer!"

Objective 5: Operating within an equal opportunities framework by

5.1 continuously reviewing our equal opportunities policy, incorporating best practice in all our operations, wherever possible.

5.2 to put Equal Opportunities as a quarterly standing item on our internal meeting agendas.

See comments under Objective 3.1.

Qualitative

Respondents marked a scale, which reflected their opinion as to how well they think CEU has lived up to **Objective 5** over the last year. **N.B. Only CEU staff were consulted on individual activities.**

	Strongly Disagree	2	3	4	Strongly Agree	Don't Know
Staff						
Activity 5.2: continuously reviewing our equal opportunities policy, incorporating best practice in all our operations, wherever possible.	-	-	X	XX	-	-
Activity 5.3: putting Equal Opportunities as a quarterly standing item on our internal meeting agendas	X	-	X	X	-	-
Associates	-	-	-	-	-	XX
Co-tenants	-	-	-	-	X	X
Funders	-	-	-	-	X	--
Clients	-	-	-	XX	XXXXX	XXXXX XXX
Partners	Not asked					
Clients/Partners	-	--	X	-	X	XXX

54% of our clients don't know how well we do against this objective with 46% considering that we are successful or very successful in achieving it. More awareness raising of our efforts in this area need to be included in our publicity materials, but also by including this as a standing agenda item at team meetings we can see if there is more that we can do to improve our performance, in order to leave no doubt in our stakeholder's minds.

"I feel that the answers to many of the questions will not be symptomatic of the CEU's work as we were forced into a relationship by the SWRDA in none ideal conditions and for a very short period of time".

8. Environmental impact

We have an environmental policy which can be seen at [Appendix 2](#) and amongst our values is the principle of trying to 'Tread lightly on the earth'. We endeavour to do this through a number of means including:-

- ❑ Our stationery being printed on conservation grade paper
- ❑ Recycling all office paper by using paper on both sides and then paying to have it collected and recycled by a local co-operative.
- ❑ Recycling envelopes and using them again to send out mail to those we would term 'friends', which is basically anyone apart from new clients or potential funders.
- ❑ Purchasing environmentally friendly products such as recycled flipchart paper pads, refilled printer toner cartridges, out of print postage stamps and Ecover washing up liquid.
- ❑ Purchasing Fairly Traded products such as tea and coffee at all times.
- ❑ Recycling used stamps and Christmas Cards for charity.
- ❑ Taking glass and plastic containers to the recycling banks.

We have a policy of trying to share transport when able to for travelling to events and conferences. Two of our team regularly walk to work and one cycles when she can.

Unfortunately as we are in rented accommodation we are unable to change the light fittings to low energy but are always conscious to turn off lighting or any other equipment when it is not needed.

In addition to trying to limit the negative impact we have on the environment, apart from paying to have our paper recycled all of the above reduces our consumption and therefore stationery budget greatly. We hope to be able to quantify this in future years.

9 Compliance

During the Social Audit Year we have worked to meet our internal **Equal Opportunities** and **Environmental** policies, both of which are included as appendices to this report.

In addition we have to comply with **Company Law** and do this by ensuring our **Annual Returns** are sent promptly to Companies House and that we are **trading solvently** at all times. We also have the appropriate insurances such as **Employer's Liability** insurance. We endeavour to meet Health & Safety legislation.

Recent Developments under this heading

We have been successful in securing a contract, indirectly, through the Small Business Service to provide support to Social Enterprises in the Non-Objective 2 areas within Devon from 1st April 2003. As a result we have committed to the following:-

1. Registration with the Data Registrar under the **Data Protection** Act (done)
2. Development of and adherence to a **Client Confidentiality** Policy (written and to be adopted 13/5/03)
3. Working towards the achievement of **Investors in People** Accreditation
4. Development of and adherence to a written **Customer Complaints** Policy (written and to be adopted 13/5/03)

10 Main Issues, Conclusions and Recommendations

10.1 Problems and Weaknesses of the Social Audit Process

As a small organisation undertaking social accounts for the first time we fell victim to our own aspirations of reporting against nearly all of our objectives without having a true understanding of how much time it would take, and what information it was realistic to gather.

We wanted to set a good example to our VEST participants but have been caught up in supporting them with their accounts, and ensuring other service delivery, at the cost of our own social accounts planning.

We also feel we should have set up systems earlier in the accounting period and been more ruthless at collating the quantitative on-going information on a monthly or quarterly basis rather than leaving it all to the 11th hour!

In terms of consultation, we sent out various questionnaires to the key stakeholder groups. From the responses received we realised that had we explained to our stakeholders about CEU's social accounts, through ongoing publicity through the year, we might have had less chasing up to do for responses and recorded a higher level of understanding from

stakeholders as to what social accounts are and how their views fitted in. In future years we would also ensure that questionnaires were sent out earlier.

In terms of analysis of questionnaire returns, number crunching manually takes a huge amount of time and does not allow for flexible analysis. In future years we would seek to explore ways in which to use spreadsheets and databases and make sure our IT skills were up to the job!

In setting our Objectives and Activities for next year, we are more conscious of the need to choose appropriate and self-explanatory phrases, and be realistic as to what can be achieved by a small staff team. Staff members summed up the issues thus:

“Social accounts, great and very valuable but hard work. We must be more organised next year!”

“We are trying hard in all the above things and areas (Objectives and Activities) and things are improving but sometimes we forgot how few of us there are and how much we are all already tackling”

On the positive side, we were delighted by some of the feedback received through the process.

“Excellent – very few organisations take the plunge and lead by example – good old CEU. Confirms the views widely held about the quality and excellence of the organisation” (customer feedback)

“I have received comments from other funded projects that have been involved with CEU and these have been highly positive” (funder feedback)

Undertaking the Social Audit has also been useful as a team building process (particularly when pulling it all together!), it plunged a new member of staff in at the deep end in terms of what CEU is about, and helped us to collectively look at what we do and who we engage with.

11 Future Plans

11.1 Dissemination and Dialogue

We intend to produce 500, full colour, printed copies of an A3, folded to A5, summary of the Social Accounts. This will be sent to all stakeholders, put on CEU’s website and used as a marketing tool/annual report. We will seek feedback via email, letter or fax.

11.2 Follow-up Action

The following issues will be addressed as a result of our social accounts:

- a. Design, production and dissemination of marketing materials to provide clear information about the scope of CEU’s activities. We need to balance this with stimulating demand we cannot meet so;
- b. Undertake urgent review of current capacity and define future strategic direction including options for growth.

- c. Revisit Objectives and Activities in line with b. and findings from Social Audit (this will need to be done taking into account current contractual obligations).
- d. Define clear contractual arrangements with ALL our clients and partners to ensure that a clarity between business and personal relationships.
- e. Establish peer appraisal system across the staff team (as opposed to line management).
- f. Establish new financial management systems (following through from 2002/03 Activities).
- g. Celebrate!

11.3 The Next Social Audit Cycle

We will continue with the Social Audit process and will aim to report on the Year for 2003/04 at the same time next year.