



The Centre for Women's Enterprise and Employment

Train 2000 Ltd
Social Accounting Report
September 2001 - December 2003

5th floor, Wellington Buildings
The Strand
Liverpool
L2 OPP

0151 236 6601
info@train2000.org.uk
www.train2000.org.uk

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1. Introduction

Welcome to Train 2000's third set of social accounts, we believe they provide a comprehensive overview of Train 2000's activity for the period September 2001 to December 2003.

This social accounting period has been an exciting one for Train 2000 including the branding of Train 2000's services to women under the POWER Programme (*Promoting Opportunities for Women in Enterprise and Regeneration*) banner and the implementation of this programme.

Train 2000 would like to thank all of the women who have participated in the POWER Programme and the funders that have facilitated it.

The whole Train 2000 team have participated in the development of this document, Helen Millne and Lisa McMullan have acted as Social Accountants within the organisation.

2. Background

Train 2000 was established in 1996, as a non profit distributing social enterprise, in order to promote a range of high quality business support services for women. Our founder members, drawn from the voluntary, private and education sectors, recognised that the existing business support provision failed to recognise the specific needs of women seeking self employment as it was mainly inaccessible and inappropriate. Their vision of an integrated business support service laid the foundations for the way in which we now deliver our services, and has enabled it to be recognised as one of the leading women's enterprise development organisations in the U.K.

Since inception, Train 2000 has delivered a range of enterprise support services and through its commitment to quality and approach to service delivery it has emerged as the foremost organisation in Merseyside delivering the comprehensive range of business support services required to successfully encourage and support women through the business start up and development stages in Merseyside.

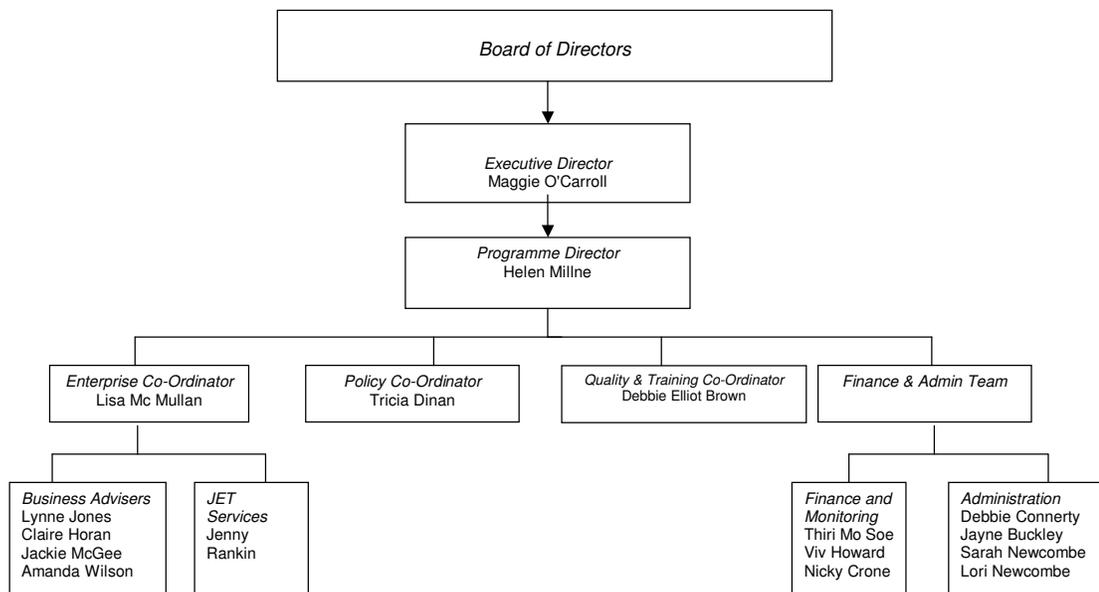
Since September 2001, Train 2000 has branded the comprehensive free services to women on Merseyside the POWER Programme. POWER is Promoting Opportunities for Women in Enterprise and Regeneration and is funded through public contracts, private partners contributions and Train 2000's own income generating activity.

The POWER Programme offers a number of services for women at all stages of the route towards self-employment, and also for women who may have

had their own business for some time or manage social enterprises. As each individual's needs are different, we have developed our services to be as flexible as possible, for women to choose the combination of options that best suit their requirements. The programme is free to women from Merseyside, is supported by translation and interpretation as required and provides childcare, carers and subsistence expenses to support particular training.

With the growth of the organisation Train 2000 recognised the need to restructure its staff team to facilitate appropriate support and supervision of team members, and the effective management of the organisation's activities.

In spring 2003 after staff and management consultation a new structure was introduced. Train 2000 staff team comprise at the end of the accounting period of 15 paid and two volunteer members:



Train 2000 has also revised its mission, values and objectives since its last social accounting period, reflecting the organisation's growth and development. The revised statements are the result of a team development day in April 2004, subsequently by the Board of Directors, and form the basis for presenting Train 2000's performance in this set of social accounts.

3. Mission, values, objectives and activities

Mission

Train 2000 is an innovative women's organisation that provides quality enterprise and employment services and influences policy in order to improve the economic position of women.

Values

To be *inclusive*, recognising the needs of individual women and particularly ensuring that we reach and respect the needs of disadvantaged and underrepresented women.

To be *innovative*, continually improving the way we work and provide services by incorporating new ideas, information and methods.

To work in *partnership*, adding value to what we do by working with others to build trust, develop mutual understanding and through reciprocal actions develop social capital.

To strive for *quality*, committing the organisation to improvement and high standards in all aspects of its activities and working environment.

Objective 1

To provide a range of quality, client sensitive enterprise and employment services for women in Merseyside.

We do this by:

1. Raising the awareness and aspirations of women across Merseyside regarding their enterprise and employment options through, for example, advertising and coverage in local media, promoting role models and organising awards
2. Developing and providing accessible services for individual women and groups of women
3. Developing and providing appropriate enterprise and employment services for individual women and groups of women
4. Strengthening enterprise networks for women through, for example, effectively working with other enterprise support organisations, banks and business networks

Objective 2

To influence local, regional, national and international policy and practices in the area of women's economic development

By:

1. Networking with a range of appropriate organisations and government bodies, formally and informally for example participating in appropriate boards, steering groups and engaging in a range of activities
2. Gathering information, highlighting issues and identifying evidence based solutions to disseminate appropriately
3. Representing Train 2000's view on women economic development issues through, in particular, producing policy documents and responding to policy consultation, participating in policy think tanks, conferences, seminars and exhibitions

Objective 3

To maintain and develop Train 2000 as a sustainable organisation

By:

1. Maintaining a strong structure for governance that enables effective decision making and direction giving
2. Ensuring that an effective team is in place using good practices in selection, recruitment, retention and having clear internal communications
3. Securing appropriate financial resources to allow the implementation of Train 2000's objectives
4. Implementing a comprehensive marketing strategy for Train 2000
5. Underpinning all activity with appropriate quality systems and working environments

4. Stakeholder Analysis

Stakeholders

Given the definition of a stakeholder as being anyone / organisation that influences or is influenced by our organisation, a comprehensive list of stakeholders was drawn up and agreed by Train 2000's social audit team.

POWER Programme Clients

This stakeholder group includes women who access services through the POWER Programme, and associated projects such as Levelling Up.

POWER Programme delivery partners/funders

This stakeholder group includes organisations that with Train 2000 co-finance, either through cash or in-kind, the delivery of the POWER Programme.

- Small Business Service Phoenix Development Fund
- Learning & Skills Council
- Active Communities Unit, Home Office
- ESF (European Social Fund) Merseyside Objective 1 Programme
- ESF EQUAL Accelerating Women's Enterprise Development Partnership
- Information Advice & Guidance Partnership
- Barclays Bank
- Liverpool John Moores University

Business Support agencies

This stakeholder group is made up of business support agencies from which Train 2000's enterprise clients may be able to access financial assistance, for example:

- Barclays Bank, Natwest Bank and other banks
- Princes Trust
- Merseyside Special Investment Fund (MSIF)
- New Entrepreneurs Challenge (NEC)
- Arts and Cultural Industries Development Fund (ACID)
- Liverpool City Council Financial Assistance to Business (FAB) scheme

Strategic Partners

Those organisations / agencies with whom Train 2000 works, through for example contributing to research and evidence providing to influence and affect policy. These partners include Prowess, a national organisation that promotes women's enterprise support services.

Networks

Train 2000 works within appropriate networks such as Prowess, Women's Business Network (WBN), the Social Enterprise Network (SEN) and the Development Trust Association (DTA) to ensure sharing of best practice and to collaborate on appropriate ventures

Staff Team Members

Staff either paid or voluntary who contribute to the delivery of the organisations core activities. During the period under review the Train 2000 staff team comprises 17 members and three core associates.

Board of Directors

Train 2000's voluntary Board of Directors made up of 9 directors and two advisers.

Consultancy Clients

This stakeholder group includes organisations from the social economy, public and private sector that have accessed consultancy services from Train 2000. Whilst the organisation has a responsibility to generate income through the consultancy services, Train 2000 Board of Directors also accept, when resources allow, that consultancy services are provided to community organisations at a low or no fee basis.

Other Stakeholders

- Venues e.g. Kirkby Unemployed Centre
- Specialist support providers
- Awarding bodies
- External tutors

Within the current social audit cycle we have consulted with the POWER Programme clients, staff team and Board of Directors.

In this period, external stakeholders have not been consulted and the organisation will ensure that other stakeholder groups are included in future cycles.

5. Methodology

5.1 Why we undertake the Social Accounts

The social accounting methodology provides us with the framework to prove the value and impact of the activities that we undertake to achieve the organisation's mission, and through the findings to identify opportunities for the ongoing improvement of the organisation and services that we provide. This is the third set of social accounts produced by Train 2000, and we are committed to the process, and believe it is becoming embedded within the organisation's practice.

5.2 Scope

This report covers the period from September 2001 to December 2003. The period has been moved to end with the calendar year so that future annual reports will fit within our financial accounting year.

The accounts report on the whole organisation, and all the objectives and activities, by drawing together existing information from embedded systems.

5.3 Omissions

We do not have external stakeholder perceptions for objectives two and three as Train 2000's management agreed that the focus of this social accounting cycle would be with the Train 2000 staff and management teams (Objectives 2 and 3) and the POWER Programme clients (Objective 1).

In order to ensure that Train 2000's social accounting process is truly multi-perspective it is intended that external stakeholders not included in this consultation will be included in the next social accounting cycle.

5.4 Method

Train 2000 has defined its activity within the aims and objectives of the organisation, and in order to assess the delivery and impact of the stated objectives performance indicators were defined within the previous social accounting period. The list of performance indicators has been reviewed within the current cycle.

In order to review Train 2000's performance both primary and secondary research methods were used to gather both quantitative and qualitative information.

Primary research included investigating the views of key stakeholders through postal questionnaires, end of course evaluations, telephone interviews, focus groups, use of the green office checklist and social capital stock take and collections of thank you cards.

Secondary research included a review and analysis of existing management information, quality standards and evaluation documents and review of relevant policy documents.

Quantitative Information

Train 2000 maintains comprehensive monitoring systems, these include:

Financial probity and control

Financial records are maintained weekly and include petty cash records, income and expenditure accounts including cash and cheque, PAYE and VAT. During the accounting period the SAGE system was introduced to complement the existing management control and financial auditing systems.

Client based activity

The client based quantitative information has been collected from analysis of an established database. The database is constructed using information from individual client files with regard to business counselling and training activities. This information is used as a management tool for monitoring performance and ensuring that services are developed and delivered effectively, in particular in terms of achieving those targets specified by the Board of Directors for the POWER Programme.

Staff records

Staff records are maintained within a confidential personnel-filing system and include personal information, application details, timesheets, sickness and holiday records, and training records. These systems are again being reviewed and improved as part of the organisation's commitment to maintaining the Investors in People standard.

Qualitative information

Throughout the social accounting period Train 2000 has collected the views of its key stakeholders, as detailed below. All data was analysed by the Social Accounting team.

Promotional materials

Copies of newspaper articles, photographs and other promotional materials are filed in month order and kept for reference in the office with client case studies and interesting articles displayed in the training room to share with clients.

POWER Programme clients - Advice evaluation

Since the system was introduced in August 2003, clients accessing one to one advice have been asked to complete an evaluation form during the first week of every month. During the accounting period clients accessing both JET and Business counselling have completed evaluation forms for a total of 79 sessions.

In addition the Information, Advice and Guidance partnership, with which we contract, require that advice evaluation and monitoring questionnaires be sent to a sample of clients one month and six months after their initial appointment. This monitoring is carried out, but minimal forms are returned using this method.

POWER Programme clients - Training evaluation

Clients who undertake business enterprise, personal power or community enterprise training complete training evaluation sheets on a regular basis. These forms are collated and reviewed by Train 2000's Quality and Training Co-ordinator who is then responsible for addressing any concerns raised. These completed forms are filed alongside other documentation related to that particular training session / course.

In addition, in January 2004 a focus group was held to which all of the participants of cohorts one and two from the Certificate in Supervisory management were invited, three focus group discussions were held and a total of 17 completed evaluation forms returned to Train 2000 for analysis and their feedback was formally recorded.

Staff and Board of Directors

In May 2004 staff and Board of Directors were consulted through e-mailed and postal questionnaires, which were analysed by the Programme Director.

Team members who work up to a minimum of two days per week in the office environment were consulted on

- Train 2000's mission, values, objectives and activities
- Their work with Train 2000
- The Green Office Checklist
- The social capital stock take questionnaire

All 17 questionnaires were returned. Where questions were not answered the reported figures are based on the actual number of responses per question. Other associates were not consulted in this period, but will be included in future cycles.

Board of Directors and advisers were consulted on Train 2000's mission, values, objectives and activities only. Five out of 10 responded, mainly as a result of the very short timescale for responses. Again, reported figures are based on the actual number of responses per question.

Supplementary Reports

Investors in People Assessment Report	February 2002
Government Office North West Financial Control Team Verification Visit - Inspection Report	November 2002
Greater Merseyside Learning and Skills Council (GMLSC) Audit and Assurance Report	January 2003
Measuring Impact Report for the Women in Business Programme	May 2003
Prowess Flagship Award Verification Visit Report	July 2003
Accelerating Women's Entrepreneurship (AWE) Development Partnership Interim Evaluation Report	December 2003
Matrix Assessment Report (Information, Advice & Guidance Service)	February 2004

6. Performance Analysis

6.1 Mission and Values

Train 2000 is an innovative women's organisation that provides quality enterprise and employment services and influences policy in order to improve the economic position of women.

The mission, values, objectives and activities of the organisation were redrafted as part of the process of drafting these social accounts, through a process of consultation at a development day and subsequently at team meetings.

Of the Board of Directors respondents to the questionnaire 3/5 thought that the revised mission is right for Train 2000, two think partly, suggesting that it could be more aspirational and that it is too much a statement. Of the staff responding to the same question 13/14 think that this is the right mission statement for the organisation, and one stated partly.

All of Train 2000's activity is underpinned by its core values, which are stated below:

To be *inclusive*, recognising the needs of individual women and particularly ensuring that we reach and respect the needs of disadvantaged and underrepresented women.

12/14 staff and all of the Board of Directors respondents felt that Train 2000 was either successful or very successful in working within this value.

To be *innovative*, continually improving the way we work and provide services by incorporating new ideas, information and methods

14/15 staff and all of the Board of Directors respondents felt that Train 2000 was either successful or very successful in working within this value.

To work in *partnership*, adding value to what we do by working with others to build trust, develop mutual understanding and through reciprocal actions develop social capital.

14/15 staff and all of the Board of Directors respondents felt that Train 2000 was either successful or very successful in working within this value.

To strive for *quality*, committing the organisation to improvement and high standards in all aspects of its activities and working environment.

12/14 staff and 4/5 of the Board of Directors respondents felt that Train 2000 was either successful or very successful in working within this value.

4/5 of the Board of Directors agreed that these are the right values for Train 2000, one suggested partly and that being supportive should be highlighted more.

Value analysis from the social capital stock take undertaken with the staff team

Shared Norms & Values	<p>79% feel that Train 2000 does have a clear set of values</p> <p>79% feel that all staff and board members understand our values</p> <p>71% feel that all staff and board members share our values</p> <p>71% feel that we do share our values with the organisations we work with</p> <p>93% feel that we tell others our values</p>
Commitment & Sense of Belonging	<p>79% feel that we do have strong roots amongst the people we serve</p> <p>64% feel we are truly accountable to our clients</p> <p>79% feel that we involve our clients in our work</p> <p>64% feel that we keep people informed about what we do</p>

Train 2000 recognises:

- The mission and values of the organisation provide a clear message to the world of who we are and what motivates us in our work.
- It is apparent that there is a shared understanding of what the organisation is about, and how it wants to approach its work.

Train 2000 will:

- Organise a shared development day between staff and Board of Directors to concrete each others understanding of the mission and values of the organisation.
- Train 2000 will continue to ensure that the values are incorporated into the selection and induction process of staff and committee.

6.2 Performance Analysis Objective One

Objective 1

To provide a range of quality, client sensitive enterprise and employment services for women in Merseyside.

We do this by

1. Raising the awareness and aspirations of women across Merseyside regarding their enterprise and employment options through, for example, advertising, coverage in local media, promoting role models and organising awards.

Promotion

During this period Train-2000 promoted the POWER Programme by advertising in the local free press across Merseyside. A total of £27,128 was spent during the social accounting period placing 63 different advertisements.

The importance of continued advertising in this way was highlighted in Train 2000's Prowess Flagship Report: *'for one client it was particularly important that the newspaper advert ran for 4 consecutive weeks as it took this long for her confidence to build to the point that she was able to make a telephone enquiry.'*

POWER Programme promotional activities also include a considerable amount of liaison with other enterprise and employment support organisations, community based organisations and other organisations that come into contact with women who could benefit from Train 2000 services. As such, team members participate in a range of open days, exhibitions, informal meetings etc as the opportunities arise. An example of this is Train 2000's participation in the International Women's Day Celebration held in Liverpool's Pakistani Centre, March 2003.



International Women's Day, March 2003

Role Models

In addition to the direct targeting of clients through these advertisements, a number of articles have also been published in the Liverpool Echo, Liverpool daily Post and a range of newsletters and magazines. Contents of the articles

are diverse ranging from case studies of individual client success stories to the success and innovation of Train 2000 as an organisation and the reporting of specific events such as Train 2000's Achievement Award Ceremony for women running their own businesses in November 2002, when the awards were presented by Louise Ellman MP and attended by Cherie Booth.

A Celebration Event was held in Kirkby in December 2002 to present certificates of achievement and accreditation to all those women who had participated in Train 2000's 2002 initiatives. Over 100 clients attended the event, their family and friends and Fiona McMath, a successful women entrepreneur who accessed Train 2000 support in 1997-8, presented the awards.

During the social accounting period another POWER Programme client, Nicola Fraser trading as Kylie Too (December 2002) won a Merseyside NatWest Bank Award for the best business plan.



POWER Programme clients featured in The Liverpool Echo.

Website

Train 2000 have successfully launched a new website which provides detailed information about the organisation and its services. This has been mainly developed in 2004, when the highest standard of accessibility was achieved, although preparation and planning was undertaken during the accounting period.

Impact

The net result of these awareness-raising activities across Merseyside is that 2384 women accessed services from Train 2000 during the period September 2001 to December 2003.

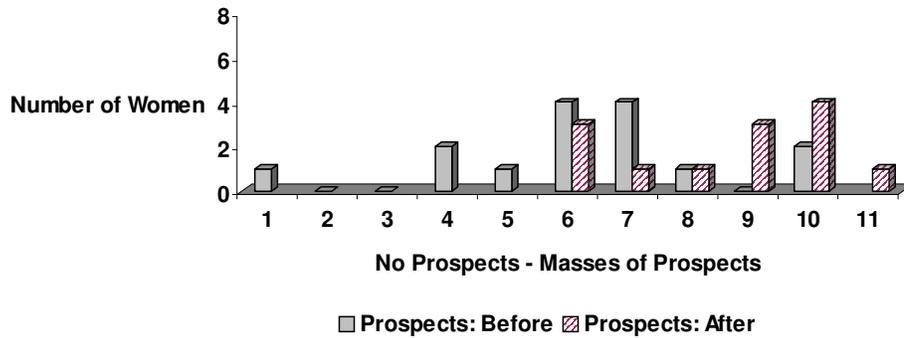
An independent evaluation of a sample of our clients was undertaken as part of the external evaluation of the Accelerating Women's Enterprise (AWE) Development Partnership. Train 2000 is a member of the AWE Development

Partnership which comprises of 10 organisations based across England that are committed to promoting women's entrepreneurship and improving the services available to women entrepreneurs.

17 women completed and returned a questionnaire for analysis and one of the key findings highlighted was the progress individuals felt that they had made in the time from first accessing support from Train 2000 in terms of confidence, self esteem and prospects.

The results are shown in the graphs overpage.

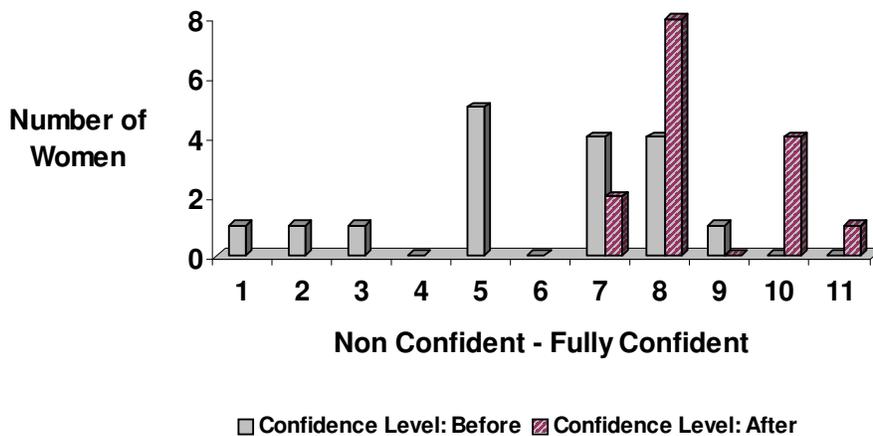
**Prospects Before And After
Involvement With Train 2000**



**Self Esteem Levels Before And After
Involvement With Train 2000**



**Confidence Levels Before And After
Involvement with Train 2000**



We believe that these results demonstrate the impact Train 2000 has had on raising the awareness and aspiration of women regarding their enterprise and employment options, and in the words of clients:

What the clients say:

Sample comments made by clients

:

'After meeting with my adviser, the confidence I gained was unbelievable...helped me to know I can really do this' (Advice evaluation sheet, November 2003)

'...and all the staff at train 2000 I can't thank you enough for all your help and support in getting me started. I really couldn't have done it without you!' (unprompted card)

'I wish I could bottle some of their enthusiasm and take it home...I was so low and they have given me hope.' (matrix assessment report, p 4)

Conclusion

Train 2000 recognises:

- The importance of maintaining a targeted profile within the local press using both advertisements and the direct promotion of role models
- The importance of working with a broad range of specialist organisations to ensure that the POWER Programme is effectively promoted to women from different areas and black and minority ethnic groups in particular, and those facing other disadvantages
- The need to make more effective use of our website in particular to promote the POWER Programme services and to showcase women's successes

Train 2000 will:

- Continue to promote the POWER Programme in local press and through local networks
- Implement a co-ordinated proactive approach to promoting individual clients through newspaper and other published features, nominations for awards and participation in appropriate events
- Ensure that its website is kept up to date with information on services and women's success stories
- Support clients in acting as positive role models, by working with Women's Business Network (North West) in particular to ensure that women have the appropriate skills and knowledge

2. Developing and providing accessible services for individual women and groups of women

Train 2000 places considerable emphasis on ensuring that the services it provides are accessible to women, in particular, those who have care responsibilities, are on a low income, have low self confidence, are members of black and minority ethnic (BME) groups and women who have a disability.

Timings

POWER Programme training sessions are held during school hours and school term time to ensure that women who care for children of school age can access training. One to one advice sessions of around an hour are arranged at a mutually convenient time between 9.30am and 4.30pm. Later sessions can be agreed in certain circumstances.

Carers and childcare support

All training is supported with care allowances so that clients can access financial support to pay for care costs for young children or other dependents.

56% of women accessing services during the social accounting period had childcare or caring responsibilities, and 26% described themselves as lone parents.

265 women received expenses to support childcare or carer expenses during the social accounting period, to the value of £31,526, the equivalent of £13,511 per year. This is a 60% increase on the 2000-2001 figure in the previous accounts.

Interpretation and translation

For clients whose first language is not English or who are hearing impaired Train 2000 ensures that appropriate translation or interpretation services are provided.

In the social accounting period a minimum of 35 women have been supported to access services this way: 1 woman from Kosovo with a language interpreter; 2 women with hearing impairment; and 4 different groups with language interpreters.

Accessibility of training materials and styles

In response to client feedback, as highlighted in the previous set of Social Accounts Train 2000 now produce an annual timetable of core training that assists in planning and participant in training.

The workbooks and other resource materials that are used to support the business training and one to one advice are also available in e-versions for clients to use with appropriate software as necessary and all documents can be produced in large print.

Accessible venues

Train 2000 operates from offices and training rooms on the 5th floor, Wellington Buildings, The Strand, Liverpool and moved here during the social accounting period, December 2001. The move was necessitated by Train 2000 operations out-growing its previous location in Blackburne House, Liverpool 8.

The Wellington Buildings are fully accessible and located in the city centre close to public transport links. Parking can be difficult and expensive as with any city centre location but clients are encouraged to use public transport wherever possible and allowances are paid to clients accessing training to overcome any of the barriers associated with travel costs.

The POWER Programme is also delivered on an outreach basis and Train 2000 will always aim to use fully accessible venues. Training has been held in the Birkenhead, Dovecot, Kensington, Kirkby, Netherton, Toxteth and Wallasey areas in the accounting period, ensuring that Train 2000 has provided services in each of the four local authority areas in Merseyside, Liverpool, Knowsley, Sefton and Wirral.

Impact

Client profile September 2001 - December 2003

- 26% of women accessing the POWER Programme are lone parents.
- 21% (2.7%) of women were black, or from minority ethnic groups
- 15% (3.1%) of women have described themselves as being disabled
- Approximately 15% of women were under 25; 72% were between 25 and 49 and 13% were over 50.
- 54% of women were employed, 42% unemployed and 4% students at entry to the programme

The client profile indicates that to date we have been successful in recruiting women from our target group of black, minority ethnic and disabled women compared with the Merseyside population.

Opinions gathered from clients and other stakeholders, in particular by the independent IAG matrix assessor, demonstrate the impact Train 2000 has had in terms of providing accessible services:

What the clients say:

"...the assessor learned that 'the word is out' in the Asian and Somali communities and that Train 2000 is 'an organisation with integrity, intensity and enthusiasm for women's careers'. Representatives of these communities feel that because Train 2000 is developing services for them in consultation with them there will be a higher take up of advice and guidance from these communities." ' (matrix assessment report, p19)

'I am virtually blind in one eye, they use low lights, big print, easy colours and read to me. They couldn't do more. (matrix assessment report, p12)

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'they show you respect...' (matrix assessment report, p12)

Conclusion

Train 2000 recognises:

- The importance of providing services at appropriate times in particular during school hours and in the evenings to ensure that women with different work and home responsibilities can have access
- The importance of providing care and subsistence allowances that cover the true costs of child, or other dependent care, as well as travel and lunch
- That the provision of specialist support measures helps Train 2000 to access women who would otherwise be excluded from mainstream enterprise and development provision
- That it has been helpful to produce an annual programme of training to assist clients and team members plan and schedule customised programmes as appropriate
- The importance of using accessible and safe venues at all times

Train 2000 will:

- Continue to secure funds that will cover the costs associated with providing the measures detailed above that overcome a range of practical barriers that women face when accessing support
- Establish a system that accurately and fully records the specialist support measures that are implemented
- Undertake staff training in equal opportunities and disability awareness in particular to ensure that team members are aware of their responsibilities and confident in dealing appropriately and sensitively with all clients
- Continue to use accessible venues at all times

3. Developing and providing appropriate enterprise and employment services for individual women and groups of women

POWER Programme

Since September 2001, Train 2000 has branded the comprehensive free services to women on Merseyside the POWER Programme. POWER is Promoting Opportunities for Women in Enterprise and Regeneration and is funded through public contracts, private partners contributions and Train 2000's own income generating activity.

The POWER Programme offers a number of services for women at all stages of the route towards self-employment, and also for women who may have had their own business for some time or manage social enterprises. As each

individual's needs are different, we have developed our services to be as flexible as possible, for women to choose the combination of options that best suit their requirements. The programme is free to women from Merseyside, is supported by translation and interpretation as required and provides childcare, carers and subsistence expenses to support particular training.

The POWER Programme comprises the following elements:

Enterprise Gateway Service

The Gateway Service provides an initial discussion, either face to face or over the telephone, with a qualified business adviser, in order to identify the most appropriate package of internal and external services and expertise that would be of benefit to individual women.

2384 women accessed initial services through the Enterprise gateway, of who 1821 received further support.

Jobs Education & Training

The JET (Jobs Education & Training) part of the service is available for all women who are looking for either, a career change, promotion, training information or to re-enter the workplace.

- Confidential, impartial advice and guidance to help women choose a career that suits their skills, interests and abilities
- Up to date information on a wide range of careers Information and advice on education and training opportunities
- Information on any available grants and loans to help finance individual career goals
- Assistance with an action plan, which define the steps that individuals will need to take to achieve your overall career aim.

In working with would be entrepreneurs in their business planning the JET advisor can both support the woman in defining her personal skills and profile within a targeted curriculum vitae, and support her in identifying and securing any training required before she can start up her business.

When working with business development clients the JET Advisor in addition to supporting them in planning their own continuous professional development, also assists in the human capital management side of their businesses. She achieves this through offering support specifically in good selection and recruitment, including the compilation of person specifications and job descriptions appropriate for the salary ranges being recruited to.

JET advice is provided on a one to one basis and in participative workshops and 420 clients accessed JET services during the accounting period.

What the clients say:

'Very friendly and un-daunting' (Advice evaluation form, October 2003)

'It's been a fantastic help. Very motivating and very helpful – also very enjoyable!' (Advice evaluation form, December 2003)

'I am very pleased with the service that I have been given. I have learned a lot and been provided with more information than I expected – this is all very helpful.' (Advice evaluation form, October 2003)

It was also identified from advice evaluation sheets that not all advice sessions were held in a confidential environment and it was recognised that this could be inappropriate and difficult in certain circumstances. Of those clients commenting both also noted that it had not affected the nature or level of information and advice given during that advice session. It is though a matter that needs to be considered and carefully organised given the available space within the organisation and the high number of individual business counselling and advice sessions that take place.

Personal POWER

Personal development training programme with added Sparkle for women

Personal Power is an accredited self-esteem building course specifically for women, using creative approaches to help women turn their life around in a supportive atmosphere. Delivered by Merseyside's World Famous Wild Woman - Clare Campbell. www.gorgeous-goddess.com

172 women attended 16 courses during the social accounting period, of these 111 received accreditation.

What the clients say:

'Claire was very inspirational and cool. The learning methods were totally unusual and I had never learnt like this before. I really enjoyed the course.' (Review of progress on course/ pp/15/April 2003)

The 'review of progress on course' also asks participants how they felt before joining the course and feel about themselves now. Their comments demonstrate the impact of 'Personal POWER':

Before: *'I felt apprehensive about starting anything. I would begin then stop myself and worry.... Although I knew what I wanted to do, I needed a lot of guidance and encouragement that what I was doing was right'*

After: *'I believe in myself more and I feel that I will achieve everything that I set myself to do.... Even though it is scary, my life is positive and I am looking forward to the future and building a successful business.'*

(Review of progress on course/ pp/15/April 2003)

Before: *'Unsure and uncertain, not very confident and not worth bothering with'*

After: *'I am more confident, more self assured, I know where I am going.'*

(Review of progress on course/ pp/23/June 2003)

Business Enterprise Training & Advice

The Business Enterprise Training programme is an accredited training programme for women considering self-employment, and women who are already self-employed and are looking to develop their business. These courses cover Business Planning, Market Research, Marketing, Funds/Grants/Loans, Financial Planning, Bookkeeping, and Tax & National Insurance. Training courses are supported with One to One Business Counselling. Alternatively women can complete the training through Distance Learning or one to one advice.

Business advice includes:

- Help with identifying and accessing funding and support
- Structured business planning advice
- Advice about expansion or development of their business
- Advice about buying an existing business
- Specific advice regarding marketing, market research and financial planning

Our Business Advisers provide:

- Free, confidential advice to help develop the business or business idea
- Structured resources to help complete the business plan
- Information about any available grants and loans to help women finance their business start or development, including the Train 2000 POWER Loan Fund
- General business advice and signposting to other areas of support

536 women attended 29 Business Enterprise courses during the social accounting period, of these 190 received accreditation.

740 women received one to one business counselling during the accounting period of who 40 received accreditation.

207 women started their own business or became self-employed after support from the POWER Programme in the accounting period.

Profile of the 207 women who went into self-employment/ business between September 2001 and December 2003

- 27% of women starting their own business lone parents
- 14% of women starting their own business are black or from minority ethnic background
- 12% of women starting their own business are disabled in the workplace
- 8% are below 25, 80% are between 25-49, and 12% are over 50

We are pleased to report that the profile of women starting their own business broadly relates to the wider client profile (see table below).

What the clients say:

What has the POWER Programme helped you to achieve?

'It helped me to identify what actually is involved in starting a business'

'This course has given me the confidence to be able to realise my dream'

'A realistic view of my business idea which will help make the idea a reality and not go under in the first year'

'Self confidence'

'Focus'

(Feedback from focus group with participants attending 2 evening BET courses, July 2003)

Additional information collected from the regular client training evaluation forms has identified a number of issues that have been acted upon and helped to improve the overall quality of service provided. In particular, clients commented on the training environment, identifying that it was stuffy and too small for the group. The comments have been acted upon in the first instance with the room being emptied of all non-essential furniture and decorative plants introduced to brighten up the room. Also, the number of clients booked on to any one session has now been reduced. As part of its longer-term development, additional office and training space is being acquired and currently renovated so that it should be ready for use in September 2004.

Results from advice evaluation indicate that performance between August and December 2003 has been of consistently high quality with 97% respondents rating the 'helpfulness' of the advisors as being excellent; 97% rating the 'approachability' of the advisors as being excellent; 96% rating the 'knowledge' of the advisors as being excellent; and 93% rating the 'provision of information' as being excellent.

What the clients say:

'It was all new to me and quite difficult alone, but found advisor helpful and gave guidelines'

'Gained more confidence at each meeting'

'Without Train 2000 we would still be floundering'

'...explained everything thoroughly. I came here with so much in my head but now I have a logical process to follow this through. I am now not afraid of a 'business plan'.

Community Enterprise Training

The POWER Programme provides customised training and support for women led community, co-operative and social enterprises, enabling them to start up or develop.

In the social accounting period the programme supported Community Enterprise Training for:

- Sudanese Women's Group
- Liverpool Arabic Women's Group
- Arabic (Yemeni) Women's Group
- Edge Hill Women's Group
- Mill Farm Tots and Toddlers Group
- Women's Community Action Group
- Netherton Neighbourhood Nursery
- Netherton Community Association
- Project Chrysalis
- Kuumba Imani Centre
- The Healing Place

Two of the groups, Netherton Community Association and Project Chrysalis also accessed Personal POWER training.

168 women received services through small group support and 7 Community Enterprise Training (CET) courses during the social accounting period, of these 44 received accreditation.

What the clients say:

'There is no intimidation or pressure from the tutor and the atmosphere was relaxed'

' to actually know and understand... swot ... and how it is relevant to us...it was explained very clearly, I could understand and practice' (Netherton Park Training, 4 November 2002)

Higher-level Skills

In partnership with John Moores University (JMU), Train 2000 was able to introduce a new element to its services from the POWER Programme menu: a University Certificate in Supervisory Management. JMU deliver the taught course and Train 2000 co-ordinate recruitment activities and provide expenses and additional personal tutor support for the women students. The students were women working for themselves, community enterprises and small-medium sized businesses across Merseyside.

- *Certificate in Supervisory Management*

Three cohorts of women have to date commenced this programme. 106 women have undertaken the Certificate in Supervisory Management during the accounting period 49 of who have received accreditation, and 34 of who will complete the programme in August 2004.

Overall, the course was considered to be excellent (6 women, 35% of respondents) or good (11 women, 65% of respondents). From the survey, 5 of the respondents access support from their Train 2000 personal tutor; reasons given by the others for not accessing support were that they were unaware (2), that they had no need with one woman stating that the strong

peer support from other students within the group provided any additional help that was needed.

The end of programme evaluation survey identified that that 70% (12 women) had made changes to their job/career/ life that they felt were related to taking part and completing the course and these included:

- Increased confidence
- More self assurance
- Improved time management skills
- Establishing good practices and procedures in workplace
- Improved understanding their company
- Improved business insight
- Progressing to degree course
- Improved chances of promotion
- Promotion - 2 women have been promoted, both to senior management roles, one responsible for staff management and ICT training the other gaining an £8,000 pa increase
- Creating a new business

What the clients say:

'Understanding the bigger picture...more confidence in my own abilities, better time management; more decisive and organised. Establishing good practice and procedures in my management role within the ...organisation.' (JMU end of course evaluation, cohort 1)

'Left a job that had no prospects and am starting my own business...course gave me the confidence to realise my abilities' (JMU end of course evaluation, cohort 2)

'This course was wonderfully empowering for women & gave knowledge & boosted confidence' (JMU end of course evaluation, cohort 2)

- *Masters in Enterprise*

Train 2000 has worked with JMU during the accounting period to negotiate a Masters in Enterprise Programme for established women entrepreneurs. This programme commenced delivery in March 2004 and will be reported upon in the next social audit cycle.

Levelling Up

The Levelling Up programme is a specific project within the POWER Programme targeting women who are completing higher and further education, and encouraging them to think of enterprise as an option for them. The project has been highly successful in its first year, and Train 2000 have been successful in securing funds to complement the awareness raising and training activity with an Enterprise Promotion Game.

POWER Loan Fund

Train 2000 with the support of the Small Business Service's Phoenix Community Development Finance Initiative Fund have developed a special

loans fund directly targeting women setting up or developing a business who have traditionally been excluded from other sources of loan finance, due to a variety of factors. It aims to contribute to the creation of new women-owned businesses and create jobs across the Merseyside region.

The POWER Loan Fund was established in September 2001 and has operated successfully during the social accounting period. 29 clients, with only one long-term payment default to date, have drawn down £134,000.

Profile of the 29 women who accessed the POWER Loan Fund up to December 2003

- 38% of women starting their own business lone parents
- 4% of women starting their own business are black or from minority ethnic background
- 10% of women starting their own business are disabled in the workplace
- 4% are below 25, 88% are between 25-49, and 8% are over

Bridging the benefits gap

Another key element of the POWER Programme is the provision of independent welfare rights advice and information. Train 2000 contracts with Merseyside Welfare Rights to provide this service for clients through confidential one to one appointments. During the social accounting period 106 women accessed this support receiving assistance on matters ranging from debt management, income maximisation and accessing Working Families Tax Credit.

Impact

The impact of the POWER Programme in the social accounting period has been significant. The table below presents the quantitative achievements of the programme and includes a pro-rata annual comparison for information.

POWER Programme Achievements	Sep 2001 - Dec 2003	Annual pro rata
	Number of women	Number of women
Accessing Gateway support	2384	1022
Accessing further support	1821	780
Accessing JET support	420	180
Undertaking BET Training	536	230
Undertaking CET Training	168	72
Achieving MOCN accreditation as a result of training	190	81
Accessing 1-1 business counselling	740	317
Achieving MOCN accreditation through distance learning	40	17
Undertaking JMU Certificate in Supervisory Management	106	45
Achieving University Certificate	49	21

Due to complete JMU Certificate Aug 2004	34	
Accessing Welfare Rights Advice	106	45
Establishing new businesses, including community businesses	207	89
Moving into further training & development	702	301
Moving into volunteering	97	42
Entering part time employment	41	18
Entering full time employment	79	34

Accessing POWER Loan Fund	29	12
Total POWER Loan Fund Borrowing	£134,000	£57,429
Long term default payments	1	

Profile of women accessing Train 2000 services and starting their own enterprise

Profile	Merseyside population	Women accessing POWER services	Women accessing POWER Loan Fund	Women starting their own businesses
Employed	66%	54%	54%	53%
Unemployed	34%	42%	43%	45%
Students	-	4%	0	2%
Lone parents	24%	26%	38%	27%
Black or from minority ethnic background	2.7%	21%	4%	14%
Disabled in the workplace	3.1%	15%	10%	12%
Below 25 years	24%	15%	4%	8%
Between 25-49 years	42%	72%	88%	80%
Over 50 years	34%	13%	8%	12%

What the clients say:

'I saw Train 2000 as a starting point. I'm doing an IT course at the local school now' (Measuring Impact Report, 2002)

'Compliments all round. Everyone has been supportive and understanding in all aspects of my business and encouraging all the way...giving a good sense of security.' (Advice evaluation form, December 2003)

'Very helpful & worked really hard to help me get business plan done on time...I had been to Business Link but felt frightened and overwhelmed by having to do a business plan. The handouts made it much more manageable & understandable...Overall an excellent service – would recommend to

anyone I thought it would be helpful to.’ (Advice evaluation form, December 2003)

‘It did change things. I felt a lot more confident in business skills and actually got taken on (in a full time job)...I felt confident enough to send off my CV. It reminds me that you are not on your own’ (Measuring Impact Report, 2002)

Conclusions

Train 2000 recognises:

- That the POWER Programme is an effective package of Train 2000’s services that appears to meet the needs of different women and allows them to choose and access the relevant services. The integration of services into a single branded package appears to enable clients to access the different services more easily and has proven to be effective for Train 2000 in promoting the range of services available
- The quality and approach adopted in all service delivery receives consistently positive feedback from clients, but concerns have been raised regarding the use of confidential space for client interviews and the training environment in general
- The alternative approach to personal development training with ‘added sparkle’ has proven to be a particular innovative and empowering experience
- The integrated approach to enterprise and community enterprise support through training and advice appears to provide the flexibility that allows women to initially access support and then progress to business start up or other training and employment opportunities in a way that meets their needs
- That the high levels of skills and knowledge within the delivery team, and the effectiveness of their approach to delivery is consistent across all elements of the POWER Programme
- The success of the partnership with JMU in delivering the Certificate in Supervisory Management that has proven to be very effective in assisting women to progress personally and professionally
- The need for further information and analysis of the impact of the POWER Loan Fund and an understanding of why a high proportion of borrowers are lone mothers (38%) and a relatively low proportion (4%) are black or from minority ethnic backgrounds
- Similarly, the importance of gaining further information regarding the overall impact of Welfare Rights Advice within the POWER Programme

Train 2000 will:

- Continue to monitor performance and evaluate its services to ensure that it continues to meet the needs of its clients
- Seek out and learn from other support initiatives to ensure that the services within the POWER Programme remain relevant, up to date,

- reflect new learning and provide an innovative alternative to enterprise and employment support for women
- Pay particular attention to the quality and availability of confidential meeting space and training environments in general
 - Continue to use and promote the POWER brand
 - Ensuring that team members are encouraged and supported in keeping up to date with relevant information and accessing appropriate training
 - Seek to build on the success of the partnership with JMU to continue higher level skills training, and to explore other opportunities for potential partnership working
 - Introduce systems to gather further information and analyse information on the impact of the POWER Loan Fund and the Welfare Rights Advice services

4. Strengthening enterprise networks for women through, for example, effectively working with other enterprise support organisations, banks and business networks

Train 2000 also promotes its services to other agencies and organisations that may refer and/or support clients in complementary ways. Examples of these organisations include, banks, the Inland Revenue, Greater Merseyside Enterprises (GME), community based and private enterprise support organisations, the Social Enterprise Network, the Prince's Trust, Merseyside Special Investment Fund (MSIF) and Women's Business Network (North West) (WBN).

By working effectively with a wide range of agencies Train 2000 is able to add value to the core services of the POWER Programme by ensuring that information is up to date and that clients have a clear understanding of services available to them and have a direct route to those services. This involves direct liaison with organisations, attendance at meetings, exhibitions, conferences etc across Merseyside.

In order to gauge Train 2000's performance in working with other organisations to strengthen enterprise networks for our clients, a social capital stock take was undertaken. The stock take was completed by 14 team members and focussed on the 5 key ingredients of social capital. The 3 relevant to this activity are presented below:

Social Capital Stock Take Findings	
Trust	79 % feel that, in general, we trust the organisations we work with 79% feel that the organisations we work with trust us 50% feel that we use trust in getting things done

<p>Reciprocity & Mutuality</p>	<p>93% feel that we do help other similar organisations 64% feel that similar organisations help us</p> <p>We do this by: <i>'information & referrals; working with clients together'</i> <i>'sharing expertise'</i></p>
<p>Networks & Information Channels</p>	<p>100% feel that we have a wide network of contacts 79% feel that we nurture our contacts and go out and make new ones 50% feel they are aware of all our stakeholders 29% feel that we are in regular contact with all our stakeholders 21% feel that there are other groups that we should be in contact with more 86% feel that we are able to get good and useful information 71% feel that we share information with other organisations</p> <p>Comments:</p> <ul style="list-style-type: none"> • The social audit process was identified as a means of how we are in regular contact with stakeholders. • The time needed to develop and maintain relationships with stakeholders was identified as a potential issue but the value of this type of work was recognised.

Impact

The impact of working with other organisations is being able to provide a service to clients with the added value of having immediate access to wider networks and trusted contacts that are relevant to their individual needs than they would otherwise have had.

It is also noted that enterprise networks include those networks of women entrepreneurs and work with WBN in particular has highlighted their importance.

What the clients say:

'the experience of coming on a course with other women, sometimes from very different backgrounds and cultures, benefited many of the survey participants. The chance to share experiences and gain an insight into other peoples ideas gave people a sense of 'connection'.' (Measuring Impact Report, 2002)

'Getting banks to listen to my business plan and giving me an unsecured loan because I have no collateral was a problem...after visiting Train 2000 I went to Barclays with my business plan and they were brilliant and it quickly went through'. (Measuring Impact Report, 2002)

Conclusions

Train 2000 recognises:

- The value of building trusting relationships with individuals and organisations in order to effectively deliver the POWER Programme and provide a quality service to clients
- The time needed to effectively develop and maintain these relationships with organisations
- There is a need to extend our networks as there are other groups that we could develop relationships with
- There is a need to increase the level and quality of contact we have with different stakeholders
- That, on the whole, we have access to good and useful information and that we share that with others

Train 2000 will:

- Take a more co-ordinated approach to developing and maintaining its network of contacts
- Allocate responsibility between team members to develop and strengthen relationships with other organisations
- Review our stakeholder map and the current enterprise and employment support environment to identify organisations that should be including in our networks
- Continue to share information within the team and with other organisations

6.3 Performance Analysis Objective Two

Objective 2

To influence local, regional, national and international policy and practices in the are of women's economic development

Train 2000 has been involved in the development and delivery of innovative and award winning women's enterprise and economic development interventions since 1996. Delivery success has highlighted, that in order to achieve our goals of increasing the number, quality and diversity of women enterprises depends in part on changing the views and behaviour of a range of private, public and third sector institutions. The development of a coherent and deliverable Government policy and strategy has been a primary consideration for Train 2000 in this social accounting reporting period.

Train 2000's approach to this objective has been multi pronged, as we have sought to:

- Provide clear evidence that there are issues and problems in terms of mainstream enterprise service design, accessibility, gender sensitivity, and diversity profiles.
- Share the success stories of sustainable women's enterprises thereby contributing to the compilation of a strong evidence base that gender specific models work in terms of addressing current barriers faced by would be and developing women entrepreneurs.
- Contribute to the development of robust infrastructure and strategic partnerships, which raise awareness and support the creation of social enterprises as an entrepreneurial option for women.
- Provide leadership and vision in the creation and sustainability of gender specific support infrastructure, which raise standards and levels of service provision for women entrepreneurs and act as on going policy influencer at a regional, national and European level.

Principles

In order for Train 2000 to conduct our policy-influencing role in a more systematic manner we have developed the following working principles underpinning the activities within this objective during this accounting period:

- *Maintaining Focus* - by making the links across government goals and policies
- *Reality Checking* - by not assuming that information leads to awareness or indeed awareness leads to action
- *Priority Targeting* - by assessing who our audience is and the need for message refinement to effectively reach that audience
- *Communicating creatively* - by using a variety of methods such as testimony from women entrepreneurs as to what their needs are, their experiences and the barriers they face
- *Network Segmentation* - by goal directed networking which will give our core message the most coverage and provide the greatest opportunity for learning from good practice
- *Learning the Lessons* - by constantly reviewing our approach to policy influencing and planning in the necessary resources that are required to it successfully

We do this by:

1. Networking with a range of appropriate organisations and government bodies, formally and informally for example participating in appropriate boards, steering groups and engaging in a range of activities

Specific organisations and activities include:

Social Enterprise Network

Train 2000 support the work and the development of this Merseyside based network of non-profit distributing businesses and community and voluntary sector organisations whose main purpose and focus is driven by the collective

concerns and aspirations of its membership. Train 2000's Executive Director has been chair of the network throughout this accounting period, There has been a rapidly growing membership of SEN, currently 217, which brings together local development trusts, intermediate labour market companies, tenants' associations, community businesses, social firms, credit unions, LETS projects, advice agencies and workers' co-operatives in Merseyside and Halton.

The impact of SEN includes:

- The delivery of a social audit training and development course for Liverpool based ILM projects under contract from Liverpool City Council
- Securing funding from the NWDA for the provision of a Social Enterprise Sector Champion function as part of the SEN staff Team
- Securing of funding from the NWDA led Merseyside Social Enterprise Initiative (MSEI) for the delivery of a 'Quick Wins' Programme, including a package of social accounting and audit training; a suite of marketing and media communications workshops, consultancy and project management support for social enterprises
- The delivery of business start up, training, counselling and advisory services on behalf of Greater Merseyside Enterprises

North West Regional Development Agency Social Economy Task Group

Train 2000 contributed to the work of this task group as a representative of the Social Enterprise Network in identifying the needs of the social economy sector in the North West. By participating in this task group Train 2000 has been able to directly inform the NWDA's (North West Regional Development Agency) strategy for supporting social enterprises.

The Merseyside Social Enterprise Initiative (MSEI)

The MSEI was developed in order to implement the strategy developed by the Task Group above. The Train 2000 management team played an active role in the strategic development and management of the MSEI through supporting a Merseyside audit of social enterprises, delivery of social auditing training and attending consultation meetings in the following areas: business support and workforce development for social enterprises.

MSEI has resulted in increased resources for the sector with NWDA allocating £2.5m to the initiative (2002-06) with a commitment to match that amount with Objective 1 resource.

The MSEI has delivered a range of "Quick Wins" which tackled topics that were consistently raised as barriers during the audit .The "Quick Wins" include:

- The development of a competency framework for Board members, follow on skills audits, production of development plans and support to fund and carry forward those plans.
- The provision of bespoke marketing strategies for 20 enterprises and support to carry forward those strategies.
- A pilot project of training in the use of the media to aid marketing

- A pilot project of training in the use of IT to aid marketing
- A package of social auditing projects ranging from awareness raising, social audit training, mentoring, training trainers and training panel chairs.
- The provision of bursaries for social enterprises to attend GME business competency training.
- The provision of a range of legal support for social enterprises delivered via a private sector firm of solicitors.

The direct impact of the MSEI for the social economy sector in Merseyside is demonstrated by the creation of a 'Sector Champion' position. The need for greater networking and communication within the sector was identified as an important issue during the initial MSEI audit and therefore it was agreed to support the Social Enterprise Network (SEN) by providing resources to employ a Sector Champion, fund an annual conference and the production of briefings and newsletters.

2. Gathering information, highlighting issues and identifying evidence based solutions to disseminate appropriately

A key feature of Train 2000's policy influencing work involves responding to documents and papers issued by government departments and other organisations; calls for evidence by various committees, commissions / enquiries; calls for conference proposals etc.

A range of this type of work undertaken during this social accounting period is presented below:

Document and Recipient	Type
The benefits of social accounting as a means of measuring impact - Active Communities Unit, Home Office	Proposal
The development of an Equality and Diversity Charter Mark – North West Development Agency	Proposal
Guidance on Mapping Social Enterprise - DTI – Social Enterprise Unit	Interview
Development of Financial Instrument for Women Entrepreneurs – SBS Community Finance Initiative and Merseyside Special Investment Fund.	Proposal
Gender Specific Business Support Model – Greater Merseyside Enterprises.	Position Paper

Job, Education and Enterprise in Deprived Communities – Office of the Deputy Prime Minister	Consultation
Issues of Race and Gender within Regeneration Policy – Judge Institute of Management, Cambridge University	Presentation (Faculty)
Developing the social audit process to effectively measure the social impact of community enterprises- - Judge Institute of Management, Cambridge University	Conference Contribution
Equality Now – Women and Equality Unit DTI	Consultation
Development of the Masters in Social Enterprise – John Moores University	Module Development and Validation Board Membership
Revision of the Social Accounting Handbook – The Social Audit Network	Workshop Contributors
National Policy Form on Small Business – Small Business Service	Delegate
Development of MSEI – NWDA /SEN	Steering Group Member
Development of Liverpool Plus – Liverpool City Council /SEN	Task Group Member
International Development Task Team – Commact UK and Stuterheim Business Centre South Africa	Task Team Membership
Proving It! Social Auditing Conference – Cats Pyjamas	Conference Contributors
Effective Women’s Enterprise Support - Gathering Of the Networks	Conference Contribution

3. Representing Train 2000's view on women economic development issues through, in particular, producing policy documents and responding to policy consultation, participating in policy think tanks, conferences, seminars and exhibitions

During this accounting period Train 2000 has been involved in a number of key developments within the field of women's enterprise and economic development. Specifically we have led the development of the following:

Development of Women Enterprise Support Infrastructure

This has included playing a leading role in the creation of both PROWESS and Women's Business Network (WBN) North West.

Train 2000 senior management team members contributed to a national consultation exercise, which was carried out in May 2001. The feedback showed that there was strong support for a UK-wide "umbrella" organisation. After a successful bid to the DTI's Phoenix Development Fund in the autumn of 2001, prepared in part by Train 2000's Policy and Enterprise Co-ordinator, a steering committee representing the founder members was formed. The company was formally constituted, as a Company Limited by Guarantee by, and is chaired by Train 2000.

Prowess

Prowess's vision is to create an environment where equal numbers of women and men are starting and growing businesses. In order to make this possible there needs to be appropriate business support available to women throughout the UK, and this requires a positive attitude towards women business owners and an awareness of the barriers they can face.

Train 2000 have contributed to the development of Prowess and the key outcome of this work has been the launch of the first Strategic Framework for Women's Enterprise.

WBN (North West)

Train 2000 raised in excess of £200,000 from the Phoenix Development Fund in order to establish the network, which now networking support provides services to over 3000 in the North West of England.

WBN undertakes to:

- Support the creation of new networks for women in business
- Provide information and services to its members
- Organise events, locally and regionally for network co-ordinators and women in business
- Provide a regular newsletter to members
- Create forums whereby members can share experiences and exchange best practice
- Lobby and campaign on behalf of women entrepreneurs in the North West

- Provide and maintain a website, supplying information and creating the opportunity for members to communicate electronically

It also encourages members to undertake the following:

- Share information and experience with other members
- Designate a person to act as the liaison point for WBN
- Distribute information promptly throughout their membership
- Identify individuals who may benefit from participation in activities delivered by WBN

Small Business Service, Phoenix Development Fund: Sharing Best Practice

Train 2000 has been active in sharing our experiences in the delivery of women's enterprise support services under our POWER programme. Specific activities have included:

- Hosting 5 visits from other gender specific or social enterprise providers from across England
- Participating in 3 information sharing / evaluation events
- Organising and hosting a Merseyside event, which promoted the implementation Strategic Framework for Women Enterprise.
- Contributing to the Prowess Phoenix Development Fund Best Practice Sharing Event

Rochdale Women's Enterprise Initiative

Train 2000 have been consultants to the process of developing a women's enterprise strategy in Rochdale.

Goodwin Centre – Women's Enterprise Initiative

Train 2000 provided the Goodwin Centre, Hull with a strategy paper with which to initiate a process for progressing women's enterprise in the area.

Conference Contributions

Within this accounting period Train 2000 have supported delegate attendance and contributions at the following conferences:

Conference	Subject	Contribution
Development Trust Association	Social Auditing	Workshop Leader
Prowess 1 st National Conference	Women's Enterprise Support Evaluation Methods Positive Action Programme	Key Speaker Workshop Leader Workshop Leader
Congreso Internacional Mujer y Empleo- Bilbao, Spain	Good Practices in Supporting Women's Enterprise	Workshop Leader
Social Enterprise Network	Developing the Social Enterprise Sector on Merseyside Social Accounting	Keynote Speaker Workshop Leader

National Self Employment Providers Gathering	Women In Enterprise	Delegate
Greater Merseyside Connexions	Effective methods of promoting women's entrepreneurship	Seminar Leader
Prowess – Regional Advisory Group	Implementing the Strategic Framework in the N.W region	Chair

International – Sharing Of Best Practice

Within this accounting period Train 2000 team members have been actively involved in a number of awareness raising activities, which had a truly international flavour.

- Mayo County Enterprise Board, Ireland - Train 2000 hosted a 2 day visit to Liverpool by a team from the County Enterprise Board. The purpose was to share practice in the delivery of effective enterprise support services.
- AWE Development Partnership – as co-ordinator for this national partnership's transnational activities the Train 2000 team has participated and contributed to a number of events across Europe. For example:
 - Sardinia, September 2002 presentation of the position enterprise support for women in the UK at international conference
 - Sweden, June 2003 one-day seminar on social policy and the UK Women's Strategic Enterprise Framework, focusing on its transferability in the Swedish context. As a result of this presentation the National Swedish Farmer's organisation has been piloting social policy practices across its members
 - Germany, October 2003 international seminar to share best practices in providing business advice for women entrepreneurs
- Train 2000 presented good practices in women's enterprise at an international conference on social enterprise in Japan, November 2003.

Conclusions

Train 2000 recognises

- Government policy and strategy needs the support of key stakeholders, in particular service users, service providers and funders, if it is to be successful
- The direct involvement of Train 2000 personnel at different levels has contributed to the strengthening and resourcing of the social economy in Merseyside and the importance of a vibrant environment in which Train 2000 operates

- The importance of contributing to a range of policy forums using different methods as appropriate
- The importance of working in partnership with new and existing organisations to improve the overall environment for the promotion of women's enterprise and employment
- The value of joint learning and sharing of experiences by working in partnership

Train 2000 will

- Continue to contribute to sub regional and regional social economy activities and support SEN in particular
- Continue to contribute to appropriate discussion and influencing forums
- Adopt a co-ordinated approach to recording the range of Train 2000 contributions to policy making

6.4 Performance Analysis Objective Three

Objective 3

To maintain and develop Train 2000 as a sustainable organisation

We do this by:

1. Maintaining a strong structure for governance that enables effective decision making and direction giving

Train 2000 is a company limited by guarantee managed by a board of voluntary directors. The board is now made up of nine directors, one of whom is the Executive Director and two advisers.

In the social accounting period the board, supported by the Executive Director, has undertaken a process of skills gap analysis, and followed this with a targeted recruitment, using a brief person specification and job description, to identify women to complement the Directors' team.

The Board of Directors are:

Jackie Williams	Chair
Huda Mamoun	Vice chair
Rita Bebbington	Secretary
Tina Kavanagh	
Alison Price	
Margo Cox	
Pauline Hogg	
Jeanette Traynor	
Maggie O'Carroll	Executive Director

Ruth Livesey, WBN

Adviser

Maria Brannigan, Barclays Bank

Adviser

To support the induction of new directors, and to clarify ongoing responsibilities a Directors Handbook has been developed during this accounting period.

Board meetings are held at quarterly intervals, with ad hoc sub groups operating as required for human capital and other issues. Both the Executive and Programme Directors present reports to the board, giving information upon strategic issues, analysis of performance to date, and recommendations and requests for decisions.

All Board meetings have been quorate in the last period.

What the Staff and Board of Directors say:

6/14 staff think that the organisation has been less than successful and one person did not know if this activity had been achieved, yet all of the Board of Directors think that this has been achieved successfully or very successfully.

Train 2000 recognises:

- The Board of Directors has been strengthened over the last period
- That the staff team do not fully recognise the impact of the Board of Directors

Train 2000 will:

- Ensure that the staff team have a greater understanding of the Board of Directors team and activities by facilitating joint meetings; encouraging a staff representative to attend Board meetings and ensuring that appropriate minutes are freely available.

2. Ensuring that an effective team is in place using good practices in selection, recruitment, retention and having clear internal communications

Train 2000's approach to an inclusive organisation is based upon the understanding that to genuinely include individuals then each person needs to be 'enabled' or 'empowered' to participate. This ethos is equally important within the staff team as for clients and our aspiration is that each member of the team feels able to contribute to the development of Train 2000.

The Organisation

9/15 respondents feel able to influence the decision making of the organisation, 6 partly feel able.

14/16 respondents state that morale is generally high at Train 2000 Ltd, 2 stated partly.

Recruitment, Selection and Retention

During the accounting period a new post of Jobs Education and Training (JET) Adviser was recruited to in November 2001.

The resignation of an Administrator due to improved employment within another company triggered recruitment to the Admin and Finance team in March 2003. The recruitment process highlighted issues within the structure of that team, which resulted in the creation of a new Reception and Administrative Assistant post within the team in November 2003.

During the accounting period one team member took maternity leave, and her post was covered by consultancy support during her absence.

Train 2000 is committed to, and operates, equal opportunities within recruitment and selection procedure. Posts are normally openly advertised within local press and through appropriate networks and partner organisations. The table below indicates the breakdown of applicants to Train 2000 at each recruitment process. The table (drawn from the equal opportunities monitoring forms returned) shows a disappointing response rate from disabled people to the adverts, despite the 'positive about disabled people' and equal opportunities statements within the recruitment materials. Additionally, the response rate from people from BME backgrounds although good in relation to the Merseyside population, is not as strong as Train 2000's success in recruiting women to the POWER Programme services

Post	No. Enquiries	Female %	Return rate %	Female %	BME %	Disabled %	No. Short listed	Female %
Jet Adviser	69	100	30	100	12	6	5	100
Administrator	305	77	29	83	7	0	6	66
Receptionist *					(1)		2	2

*The receptionist post was recruited through a positive action programme supported by ELECT, a community based economic development agency, to target people in long-term unemployment to the post.

Train 2000 intends to provide good employment opportunities underpinned by family friendly terms and conditions. During the accounting period a new and improved flexi time and time off in lieu system has been introduced in response to team feedback. The maternity policy has also been updated to maintain additional benefits to the statutory provision.

A comprehensive staff handbook collates all of the organisations policies and procedures and is given to, and used with, each new staff member as part of their induction.

Staff feedback about terms and conditions, including pay

15/16 respondents stated that the terms, conditions and policies underpinning their employment are good, one partly.

8/16 respondents feel able to contribute to and /or influence the development of employment policies and practice, 3 partly.

10/15 respondents feel secure in their employment with Train 2000, 4 feel partly secure and one did not.

All of the respondents feel free from bullying, harassment and discrimination within their work.

14/15 respondents consider that Train 2000 pays them a fair wage compared to other employers/contractors, one said not.

10/15 respondents consider that Train 2000 pays you a fair wage compared to what other people within the organisation earn, 5 did not know.

14/15 respondents are satisfied with the pay they receive, one was not.

Each member of the team has a defined job description or contract, which is reviewed formally on an annual basis through the Joint Progress Review (JPR) process. During the accounting period JPRs were carried out twice through spring 2002 and summer 2003.

Staff feedback about their roles

14/16 respondents agreed their job is interesting, 2 said partly.

11/15 responded that their role had developed or become more varied in the last year, one said not and 3 said partly.

15/16 felt that their work is valued within the organisation, one said partly.

Communications and support

All staff participate in regular team meetings, which are designed to share information about individuals' activity and to raise awareness of future issues. The sequence of full team meetings has settled as a fortnightly event. Functional team meetings in the advice, admin and finance and management teams complement the full team meetings.

Line managers aim to be approachable, and to offer support as required in addition to regular informal meetings. However, Train 2000 encourages within its work practice both informal and peer support.

Staff feedback about shared learning and involvement

All (16) respondents feel part of a supportive team.

All (16) respondents get honest feedback on their performance from their line manager.

15/16 respondents get positive support from other staff members, one partly.

14/16 respondents understand the work that is undertaken by different teams within Train 2000 Ltd., and two partly understand.

10/15 respondents said they have control over their own area of work, four partly, and one did not.

12/16 respondents have a clear sense of their responsibilities, and four partly.

11/16 respondents agree that they are involved in decision-making about their own area of work, five said partly.

13/16 are satisfied with their involvement with decisions that affect their work, 3 were partly satisfied.

All (16) respondents feel their ideas and contributions are taken seriously.

Training and Development

Train 2000 is committed to the development of its team to support the quality and innovation within the services we provide, and for the personal development of the individuals working within the organisation. The Board of Directors agreed a revised training and development policy in September 2003, which more explicitly stated the recognition of both formal and informal learning as valuable opportunities. A formal training plan is agreed in September each year, as a result of the needs identified through the JPR process and business planning processes.

Staff have been supported to undertake a combination of short courses; accredited programmes; to participate in conferences and transnational activities and to participate in the running of other organisations to assist in their development within Train 2000.

Train 2000 seeks to maximise appropriate learning opportunities for staff development; these may include formal or informal training, action learning, peer support, mentoring, and opportunities to attend conferences and networking events.

Examples include:

- Gender Lens training was undertaken with staff team and colleagues from WBN in October 2003.
- Three staff members have attended excel training at Hope University
- One member of the team undertook and completed an MSt at Cambridge University.

- One member the team is undertaking an MBA and another a Masters in Enterprise at Liverpool John Moores University
- Three members of staff undertaken and completed Post Graduate Certificate in Education (Post Compulsory) from Greenwich University

Staff feedback about development within the organisation

15/16 respondents felt that they have been supported in undertaking training connected to their work, and one partly.

12/16 felt that their work allows them opportunity to overcome challenges and for personal learning, 4 responded partly.

When asked to rank five out of ten factors affecting their motivation and happiness at work, the following six factors emerged as key.

1. Shared learning and communication
2. Involvement in decision-making and control over own work
2. Opportunities to develop and advance in your role, or in other roles in the organisation
3. Praise, recognition and appreciation of work done
3. Ability to grow and be challenged through work
3. Pay

What the Staff and Board of Directors say:

10/15 staff respondents felt that overall Train 2000 was successful in this activity, but five did not. All Board of Directors felt that the organisation was successful or more than in this area.

Train 2000 recognises:

- Whilst the staff survey indicates that the team are currently satisfied in these areas, it will be important in the next year of growth and change for Train 2000 to ensure sustained commitment to good practice in these areas

Train 2000 will:

- Undertake a full review of the ICT facilities within the organisation and present costed solutions to the Board of Directors by September 2004.
- Undertake a pay review that will consider both internal and external comparisons.
- Ensure that development planning continues to include staff team, and dissemination of management decisions is clear to all staff.
- Ensure that regular team meetings include discussion of work related experiences and shared learning in development of responses.
- Identify areas for increased job enrichment through autonomy and discretion within the employee roles

3. Securing appropriate financial resources to allow the implementation of Train 2000's strategic objectives

Funding

The POWER Programme is funded through a package of contracts with public sector agencies, and some private sector support. The combination has been fluid through the accounting period.

European Social Fund

Train 2000 has been successful in securing European Social Fund (ESF) from the Merseyside Objective One Programme to support the POWER Programme under Priority 2 Measure 17 of the Programme Complement which is specifically focussed upon women's economic development.

From September 2001 to August 2002 ESF provided match funds for the whole of the POWER Programme. For the period September 2002 to March 2005 ESF supports the elements of the programme that support employed women only.

Phoenix Development Fund

The Phoenix Fund was established through the Small Business Service in November 1999, and is designed to encourage entrepreneurship in disadvantaged areas. The Phoenix Fund was created to address key recommendations set out in the Policy Action Team report Enterprise and Social Exclusion.

The Small Business Service recognise that:

- a shortage of jobs, local services and enterprise are common features amongst the socially excluded, and that encouraging entrepreneurship will help create jobs and stimulate activities in communities where crime and unemployment are high.
- developing enterprise helps meet the basic needs of local people by providing services like shops. It also helps to develop self-confidence and determination in local people and communities which are the real long term drivers of regeneration.
- due to a lack of support, advice and access to finance, entrepreneurs in disadvantaged areas experience even greater difficulties in launching their ideas than somebody starting a new enterprise generally faces.

The Phoenix Fund aims to help new businesses by providing assistance to business support providers and finance to Community Development Finance Institutions, and by encouraging shared learning to improve mainstream services in the longer term.

Train 2000 has been successful in securing funds to support both the POWER Programme and the POWER Loan Fund in the initial round of the Phoenix Development funding (September 2001 - March 2004), and through the second round 'Building on the Best' (April 2004 -March 2006).

EQUAL

Accelerating Women's Entrepreneurship (AWE) Development Partnership is a national partnership supported through EQUAL funding, which has working relationships in equivalent partnerships across Europe. Train 2000 has been a member since the partnership commenced in 2001. This partnership allows the members to share learning and understanding of the issues affecting women in enterprise and to ensure that effective practice can be translated into best practice across the participating organisations and in the longer term in the mainstream. The AWE transnational collaboration has allowed Train 2000 to contribute to knowledge exchange on a wider European basis. Train 2000 has given presentations at European Conferences, participated in exchange visits and contributed to thematic working groups to develop practice in specific enterprise subjects. The AWE Development Partnership has approved match funding until May 2005.

Greater Merseyside Learning and Skills Council -

Local Initiative Fund and Learning in Deprived Neighbourhoods Fund

The Greater Merseyside Learning and Skills Council through the Local Initiative Fund provided match funding for the POWER Programme (October 2001 - September 2003) to support the skills development of women to equip them for enterprise and management positions.

Train 2000 has been working through the Learning in Deprived Neighbourhood Fund on the Levelling Up project to encourage women leaving further and higher education to consider enterprise as an option. This pilot is running between March 2003 and August 2004.

Home Office - Active Communities Unit

The Active Communities Unit was a part of the Home Office with a remit for addressing issues of participation and involvement, particularly within deprived communities. Train 2000 were successful in securing funds for three years (April 2001 - March 2004) to support work with community and social enterprises and particularly women from BME communities.

The Active Communities Unit was restructured in 2003, its strategic priorities shifted, and the funding available could no longer support the need identified within the POWER Programme, consequently there has been no continuation within this funding stream.

Information Advice and Guidance Partnership

The Information, Advice and Guidance Partnership (IAG) was established as a delivery partnership through the Greater Merseyside Learning and Skills Council for the delivery of quality career advice and information. The partnership provides information, advice and training to support individuals to identify their career goals, develop action plans, to access training or education and ultimately secure rewarding employment.

Train 2000 secured our first annual contract with the IAG in August 2003.

Barclays Bank

Barclays Bank support the POWER Provision through provision of staff time to support clients, and through cash contributions, for example, for prizes for client achievement awards.

Liverpool John Moores University (LJMU)

Train 2000 works closely with LJMU for the provision of management training for women. In the social accounting period the university has contributed staff time and accreditation costs to the POWER Programme funding package.

Secured for 2004

Enterprise Promotion Fund

The Small Business Service has approved a Train 2000 application to pilot an Enterprise Game that will encourage graduate women to develop business ideas and consider enterprise as an option for them. This pilot will be undertaken in 2004, and reported in the next set of social accounts.

BRAIN

The North West Development Agency is managing a European Innovative Actions Programme and Train 2000 has been successful in securing investment from this programme for the development of online interactive enterprise learning materials to improve access to the POWER Programme for disabled and isolated women. This project will explore the most effective way to deliver services to women and to support them in their computer as well as enterprise literacy. This project will be undertaken in 2004, and reported in the next set of social accounts.

Consultancy

Train 2000 has been providing research and consultancy services to the social economy sector since 1995. This income generating activity allows the organisation to work towards its mission of delivering quality enterprise services, and at the same time securing sustainability for the organisation by raising the reputation and profile. Train 2000 is able to utilise the income generated to maintain the organisation's core base, and to provide match funding for the gender specific European funded programmes.

The range of consultancy services offered by Train 2000 includes;

- project monitoring and evaluation
- project research and development
- European project co-ordination
- community business development
- business training and counselling
- personal development workshops
- organisational reviews
- funding opportunity identification and application
- feasibility studies

Within the period under review Train 2000 generated income through 25 contracts. Of these ten were directly commissioned through the social economy, and 15 through the public sector.

Consultancy sources	Social Economy	Public Sector
2000-2001	35%	65%
2001-2003	40%	60%

What the Staff and Board of Directors say:

12/14 staff and all the Board of Directors respondents felt that the organisation was successful or very successful at achieving this objective.

Train 2000 recognises:

- The organisation has a good reputation for quality delivery for clients which has resulted in successful funding scenario to date.

Train 2000 will:

- Maintain its commitment to quality, and to identifying funds that meet our clients' needs.
- Continue to work with public agencies and departments to inform them of the strategic needs for women's enterprise development in the North West.

4. Implementing a comprehensive marketing strategy for Train 2000

Train 2000 has been successful in applying marketing principles within the design, delivery and promotion of its services, but has identified the need for a more strategic approach to marketing within the organisation. During the accounting period the approach to developing this strategy has included investigating both our current practice and new models for marketing, and identifying resources to support the capacity of the organisation to initially implement such a strategy.

In December 2003 funding was secured to recruit to a marketing position, and a marketing strategy and matrix were consulted on within the organisation in spring 2004.

What the Staff and Board of Directors say:

Whilst the Board of Director respondents felt that Train 2000 have performed well in this objective (4/5 said successful or very successful), the staff team views were less favourable with 7 scoring as less than successful, and two who did not know how the organisation is performing in this area.

Train 2000 recognises:

- As an organisation we have not been systematic in our approach to marketing; however the development of the marketing strategy and

confirmation of the resources to recruit a specific marketing post will support implementation in 2004.

Train 2000 will:

- We will ensure that the marketing strategy will be embedded within the organisation and implemented within the next social accounting period.

5. Underpinning all activity with appropriate quality systems and working environments

Train 2000 is committed to quality within its services and its working environment. This commitment to continuous improvement can be evidenced through the external verification of awards and qualifications

Awards and Quality Standards

Train 2000 has been recognised as a model of good practice by the European Commission in both 1999 and 2003, and was awarded the prestigious Euro Cities Award 2002 for its innovative programme development and delivery in women's enterprise. The first presentation of the Prowess Flagship Awards also recognised Train 2000 as a leader in Women's Enterprise Development in November 2003.

The organisation was a winner of the Inner Cities 100 Award in 2001 for achieving outstanding levels of growth since 1996 as a social enterprise operating in an inner city. Train 2000 has been recognised for the Investors in People Award 2002 and the Matrix Quality Standard (Guidance Accreditation Board) 2004 for the quality of its systems and service to staff and clients.

Train 2000's consultancy services were recognised as a leader in the field in 2002 when our client WEETU received the first Barbara Castle Award for Equal Pay as a result of our work.

Accreditation

In addition, Train 2000's training is underpinned by verification through the Merseyside Open College Network (MOCN), and SFEDI (Small Firms Enterprise Development Initiative) standards.

Quality Working Environment

Train 2000 recognise the importance of providing a quality-working environment for the team to work in. In the accounting period Train 2000 has invested over £25,000 on improving and updating the work environment.

However, issues with the ventilation in the offices and regular ICT problems cause ongoing problems for team members.

What the Staff and Board of Directors say:

Environment

8/16 respondents stated that they are provided with the facilities that they need to do their job, 8 felt they are partly provided.

15/16 respondents said that they work in a comfortable and safe environment, one said partly.

5/13 staff respondents felt that the organisation is less than successful in achieving this objective, all of the Board of Directors considered the organisation successful or very successful.

Train 2000 recognises:

- We provide, and must continue to maintain, consistently high quality and award winning services for clients and customers
- Uncomfortable and inefficient working environments can be very demoralising to individuals and teams

Train 2000 will:

- We must identify solutions to the ICT problems and plan a programme of investment to overcome the recurring problems
- The move to the expanded premises in September 2004 should include seating plans that will avoid overcrowding and poor ventilation.

7. Compliance

Train 2000 complies with the statutory requirements associated with providing a safe and suitable work environment for its employees. The following policies and procedures are in place:

- Anti-Harassment Policy
- Disciplinary Policy & Procedure
- Environmental Policy
- Dependants Leave Policy
- Equal Opportunities Policy
- Grievance Policy & Procedure
- Health & Safety Policy
- Holiday Leave Policy
- Maternity Policy
- Parental Leave Policy
- Recruitment & Selection Policy
- Sickness Absence Policy
- Smoking Policy

- Special/Compassionate Leave Policy
- Staff Training & Development Policy
- Flexi time and time off in lieu Policy
- Volunteer Policy

Train 2000 is fully accessible for disabled people and satisfies the requirements of the Disability Discrimination Act.

Similarly, Train 2000 complies with Data Protection legislation.

8.Environmental Performance

Train 2000 recognises that it can contribute to environmental sustainability through taking steps within the organisation's own practice. Train 2000 operates an environmental policy to minimise waste and resource consumption.

An underpinning element of Train 2000 is to contribute to the sustainability of the environment. Wherever possible, journeys are shared to minimise fuel consumption, equipment and lights are turned off when not in use to save energy, and paper and printer cartridges are recycled.

Staff are committed to identifying ways in which Train 2000 can improve its contribution to environmental sustainability.

Train 2000 operates a 'green' procurement policy, although this is limited by budget priorities.

The POWER Programme includes a management development programme that will help women to focus upon the most effective way to manage resources, including issues of environmental sustainability.

The POWER Programme supports women entrepreneurs to develop their business plan and encourages them to consider environmental sustainability within their planning.

Train 2000 recognises:

- That there is a commitment and willingness to incorporate environmental best practice into the work, but this is left to the common sense of individuals within the team to initiate.
- The team do not have a shared understanding of what the organisation is achieving in this area.
- The need to be more systematic in its approach to environmental sustainability.

Train 2000 will:

- Undertake a costed analysis and review of what good practice measures could be implemented across the team and discuss the conclusions at a dedicated team meeting

9. Summary conclusions & plans for action

Summary Mission and Values

Train 2000 recognises:

1. The mission and values of the organisation provide a clear message to the world of who we are and what motivates us in our work.
2. It is apparent that there is a shared understanding of what the organisation is about, and how it wants to approach its work

Train 2000 will:

1. Organise a shared development day between staff and Board of Directors to concrete each others understanding of the mission and values of the organisation.
2. Train 2000 will continue to ensure that the values are incorporated into the selection and induction process of staff and committee.

Summary Objective One

Train 2000 recognises:

1. The importance of maintaining a targeted profile within the local press using both advertisements and the direct promotion of role models
2. The importance of working with a broad range of specialist organisations to ensure that the POWER Programme is effectively promoted to women from different areas and black and minority ethnic groups in particular, and those facing other disadvantages
3. The need to make more effective use of our website in particular to promote the POWER Programme services and to showcase women's successes
4. The importance of providing services at appropriate times in particular during school hours and in the evenings to ensure that women with different work and home responsibilities can have access
5. The importance of providing care and subsistence allowances that cover the true costs of child, or other dependent, care, as well as travel and lunch
6. That the provision of specialist support measures helps Train 2000 to access women who would otherwise be excluded from mainstream enterprise and development provision
7. That it has been helpful to produce an annual programme of training to assist clients and team members plan and schedule customised programmes as appropriate
8. The importance of using accessible and safe venues at all times

9. That the POWER Programme is an effective package of Train 2000's services that appears to meet the needs of different women and allows them to choose and access the relevant services. The integration of services into a single branded package appears to enable clients to access the different services more easily and has proven to be effective for Train 2000 in promoting the range of services available
10. The quality and approach adopted in all service delivery receives consistently positive feedback from clients, but concerns have been raised regarding the use of confidential space for client interviews and the training environment in general
11. The alternative approach to personal development training with 'added sparkle' has proven to be a particular innovative and empowering experience
12. The integrated approach to enterprise and community enterprise support through training and advice appears to provide the flexibility that allows women to initially access support and then progress to business start up or other training and employment opportunities in a way that meets their needs
13. That the high levels of skills and knowledge within the delivery team, and the effectiveness of their approach to delivery is consistent across all elements of the POWER Programme
14. The success of the partnership with JMU in delivering the Certificate in Supervisory Management that has proven to be very effective in assisting women to progress personally and professionally
15. The need for further information and analysis of the impact of the POWER Loan Fund and an understanding of why a high proportion of borrowers are lone mothers (38%) and a relatively low proportion (4%) are black or from minority ethnic backgrounds
16. Similarly, the importance of gaining further information regarding the overall impact of Welfare Rights Advice within the POWER Programme
17. The value of building trusting relationships with individuals and organisations in order to effectively deliver the POWER Programme and provide a quality service to clients
18. The time needed to effectively develop and maintain these relationships with organisations
19. There is a need to extend our networks as there are other groups that we could develop relationships with
20. There is a need to increase the level and quality of contact we have with different stakeholders
21. That, on the whole, we have access to good and useful information and that we share that with others

Train 2000 will:

1. Continue to promote the POWER Programme in local press and through local networks
2. Implement a co-ordinated proactive approach to promoting individual clients through newspaper and other published features, nominations for awards and participation in appropriate events

3. Ensure that its website is kept up to date with information on services and women's success stories
4. Support clients in acting as positive role models, by working with Women's Business Network (North West) in particular to ensure that women have the appropriate skills and knowledge
5. Continue to secure funds that will cover the costs associated with providing the measures detailed above that overcome a range of practical barriers that women face when accessing support
6. Establish a system that accurately and fully records the specialist support measures that are implemented
7. Undertake staff training in equal opportunities and disability awareness in particular to ensure that team members are aware of their responsibilities and confident in dealing appropriately and sensitively with all clients
8. Continue to use accessible venues at all times
9. Continue to monitor performance and evaluate its services to ensure that it continues to meet the needs of its clients
10. Seek out and learn from other support initiatives to ensure that the services within the POWER Programme remain relevant, up to date, reflect new learning and provide an innovative alternative to enterprise and employment support for women
11. Pay particular attention to the quality and availability of confidential meeting space and training environments in general
12. Continue to use and promote the POWER brand
13. Ensuring that team members are encouraged and supported in keeping up to date with relevant information and accessing appropriate training
14. Seek to build on the success of the partnership with JMU to continue higher level skills training, and to explore other opportunities for potential partnership working
15. Introduce systems to gather further information and analyse information on the impact of the POWER Loan Fund and the Welfare Rights Advice services
16. Take a more co-ordinated approach to developing and maintaining its network of contacts
17. Allocate responsibility between team members to develop and strengthen relationships with other organisations
18. Review our stakeholder map and the current enterprise and employment support environment to identify organisations that should be including in our networks
19. Continue to share information within the team and with other organisations

Summary Objective Two

Train 2000 recognises:

1. Government policy and strategy needs the support of key stakeholders, in particular service users, service providers and funders, if it is to be successful

2. The direct involvement of Train 2000 personnel at different levels has contributed to the strengthening and resourcing of the social economy in Merseyside and the importance of a vibrant environment in which Train 2000 operates
3. The importance of contributing to a range of policy forums using different methods as appropriate
4. The importance of working in partnership with new and existing organisations to improve the overall environment for the promotion of women's enterprise and employment
5. The value of joint learning and sharing of experiences by working in partnership

Train 2000 will:

1. Continue to contribute to sub regional and regional social economy activities and support SEN in particular
2. Continue to contribute to appropriate discussion and influencing forums
3. Adopt a co-ordinated approach to recording the range of Train 2000 contributions to policy making

Summary Objective Three

Train 2000 recognises:

1. The Board of Directors has been strengthened over the last period
2. That the staff team do not fully recognise the impact of the new management team
3. Whilst the staff survey indicates that the team are currently satisfied in terms and conditions of employment, it will be important in the next year of growth and change for Train 2000 to ensure sustained commitment to good practice in these areas
4. The organisation has a good reputation for quality delivery for clients which has resulted in successful funding scenario to date
5. As an organisation we have not been systematic in our approach to marketing within the organisation, however the development of the marketing strategy and confirmation of the resources to recruit a specific marketing post will support implementation in 2004
6. We provide, and must continue to maintain, consistently high quality and award winning services for clients and customers
7. Uncomfortable and inefficient working environments can be very demoralising to individuals and teams

Train 2000 will:

1. Ensure that the staff team have a greater understanding of the Board of Directors team and activities by facilitating joint meetings; facilitating

- the staff representative on the committee and ensuring that appropriate minutes are freely available.
2. Undertake a full review of the ICT facilities within the organisation and present costed solutions to the Board of Directors by September 2004.
 3. Undertake a pay review that will consider both internal and external comparisons.
 4. Ensure that development planning continues to include staff team, and dissemination of management decisions is clear to all staff.
 5. Ensure that regular team meetings include discussion of work related experiences and shared learning in development of responses.
 6. Identify areas for increased job enrichment through autonomy and discretion within the employee roles
 7. Maintain its commitment to quality, and to identifying funds that meet our clients needs
 8. Continue to work with public agencies and departments to inform them of the strategic needs for women's enterprise development in the North West
 9. We will ensure that the marketing strategy will be embedded within the organisation and implemented within the next social accounting period.
 10. We must identify solutions to the ICT problems and plan a programme of investment to overcome the recurring problems
 11. Ensure that the move to the expanded premises in September 2004 should include seating plans that will avoid overcrowding and poor ventilation.

Summary Environmental Performance

Train 2000 recognises:

1. That there is a commitment and willingness to approach incorporate environmental best practice into the work, but this is left to the common sense of individuals within the team to initiate.
2. The team do not have a shared understanding of what the organisation is achieving in this area.
3. The need to be more systematic in its approach to environmental sustainability.

Train 2000 will:

1. Undertake a costed analysis and review of what good practice measures could be implemented across the team and discuss the conclusions at a dedicated team meeting

10.Social Audit process and next steps

Once again, upon completing our third set of accounts we find that we continue to learn not just from the findings but also from the process itself.

This year the whole team has been again involved in some way in compiling the accounts, either through gathering evaluation evidence from clients, responding to consultations, assisting the social accounting team with data analysis, through identifying learning points from the data compiled or through proofing and checking for accuracy. Therefore, we feel that the process is embedded within the staff team and next year will try and achieve our objective of facilitating the process to enable a member of the Board of Directors to be part of the social accounting team.

Upon verification by the panel and approval by the Train 2000 Board of Directors the 2001/2003 accounts will be circulated to strategic partners and funders of the POWER Programme, staff and Board of Directors, and will be available on request.

We are currently in the process of securing funds to print a summary version of the accounts, which we intend to circulate to our extensive client database.

Both full and summary versions will be available on the Train 2000 web site, www.train2000.org.uk.

Helen Millne and Lisa McMullan

Appendices

Staff Questionnaire

Board of Directors Questionnaire

Social Capital Stock Take

Green Office Checklist

Train 2000 Staff Team Questionnaire

You will know that Train 2000 is undertaking a Social Audit. As part of the Social Audit process we are seeking the views of our main stakeholders. The staff are an important stakeholder group and so we are interested in your views about our objectives, our working conditions and how we operate.

We would be grateful if you could complete this questionnaire and return it to Helen no later than Tuesday 25th May.

We have made the questionnaire as quick and easy to complete as possible but please add comments in the spaces provided and add any other points you may wish to make.

Thank you for your co-operation!

1. Working for Train 2000

The following questions ask you about your feelings about your job, your terms and conditions and about training.

Please tick one box for each question, and use the comments section to explain or expand on your answers.

Pay

Do you consider that Train 2000 pays you a fair wage compared to other employers/contractors?

Yes No

Do you consider that Train 2000 pays you a fair wage compared to what other people within the organisation earn?

Yes No

Are you satisfied with the pay you receive?

Yes No

Comments:

Terms and conditions

Train 2000 intends to provide good employment opportunities underpinned by family friendly terms and conditions.

Are the terms, conditions and policies underpinning your employment good?

Yes No Partly

Do you feel able to contribute to and /or influence their development?

Yes No Partly

Do you feel secure in your employment with Train 2000?

Yes No Partly

Comments:

Environment

Are you provided with the facilities that you need to do your job?

Yes No Partly

Do you work in a comfortable and safe environment?

Yes No Partly

Do you feel free from bullying, harassment and discrimination within your work?

Yes No Partly

Comments:

Development within the organisation

Have you been supported in undertaking training connected to your work?

Yes No Partly

Does your work allow you opportunity to overcome challenges and for personal learning?

Yes No Partly

Comments:

Work areas

Do you have control over your own area of work?

Yes No Partly

Do you have a clear sense of your responsibilities?

Yes No Partly

Are you involved in decision-making about your own area of work?

Yes No Partly

Are you satisfied with your involvement with decisions that affect your work?

Yes No Partly

Do you feel your ideas and contributions are taken seriously?

Yes No Partly

Comments:

Your Role

Is your job interesting?

Yes No Partly

Has your role developed or become more varied in the last year?

Yes No Partly

Do you feel that your work is valued within the organisation?

Yes No Partly

Comments:

Shared learning

Do you feel part of a supportive team?

Yes No Partly

Do you get honest feedback on your performance from your line manager?

Yes No Partly

Do you get positive support from other staff members?

Yes No Partly

Do you understand the work that is undertaken by different teams within Train 2000 Ltd.?

Yes No Partly

Comments:

The Organisation

Do you feel able to influence the decision making of the organisation?

Yes No Partly

Is morale generally high at Train 2000 Ltd?

Yes No Partly

Comments:

2. Thinking about things that influence your happiness or motivation in work, please choose five factors from the list below and rank them in order of importance to you (1 being the most important).

- Pay
- Terms and conditions of employment
- Job security
- Comfortable workspace and appropriate facilities
- Safety from discrimination, bullying and harassment
- Ability to grow and be challenged through work
- Involvement in decision making and control over own work
- Praise, recognition and appreciation of work done
- Opportunities to develop and advance in your role, or in other roles in the organisation
- Shared learning and communication

3 Values and Key Objectives

Mission

Train 2000 is an innovative organisation that provides quality enterprise and employment services for women and influences policy in order to improve the economic position of women.

Is this the right mission for Train 2000?

Yes No Partly

Comments:

Values

Please score each specific value on the 1-2-3-4-5 scale according to how you think Train 2000 has performed since the beginning of the POWER Programme. Please circle one number: 3 means OK - neither particularly successful, nor especially un-successful; 1 means very unsuccessful; and 5 means very successful.

To be *inclusive*, recognising the needs of individual women and particularly ensuring that we reach and respect the needs of disadvantaged and underrepresented women.

1 2 3 4 5 DK

To be *innovative*, continually improving the way we work and provide services by incorporating new ideas, information and methods.

1 2 3 4 5 DK

To work in *partnership*, adding value to what we do by working with others to build trust, develop mutual understanding and through reciprocal actions develop social capital.

1 2 3 4 5 DK

To strive for *quality*, committing the organisation to improvement and high standards in all aspects of its activities and working environment.

1 2 3 4 5 DK

Objectives and activities

Please score each specific activity under the five objectives on the 1-2-3-4-5 scale according to how you think Train 2000 has performed since the beginning of the POWER Programme. Please circle one number: 3 means

OK - neither particularly successful, nor especially un-successful; 1 means very unsuccessful; and 5 means very successful. If you do not know, please circle DK

Please use the comments section to add any other comments explaining or expanding on the score you have given.

Objective 1

To provide a range of quality, client sensitive enterprise and employment services for women in Merseyside.

We do this by:

5. Raising the awareness and aspirations of women across Merseyside regarding their enterprise and employment options through, for example, advertising and coverage in local media, promoting role models and organising awards

1 2 3 4 5 DK

6. Developing and providing accessible services for individual women and groups of women

1 2 3 4 5 DK

7. Developing and providing appropriate enterprise and employment services for individual women and groups of women

1 2 3 4 5 DK

8. Strengthening enterprise networks for women through, for example, effectively working with other enterprise support organisations, banks and business networks

1 2 3 4 5 DK

Comments

Objective 2

To influence local, regional, national and international policy and practices in the are of women's economic development

By:

4. Networking with a range of appropriate organisations and government bodies, formally and informally for example participating in appropriate boards, steering groups and engaging in a range of activities

1 2 3 4 5 DK

5. Gathering information, highlighting issues and identifying evidence based solutions to disseminate appropriately

1 2 3 4 5 DK

6. Representing Train 2000's view on women economic development issues through, in particular, producing policy documents and responding to policy consultation, participating in policy think tanks, conferences, seminars and exhibitions

1 2 3 4 5 DK

Comments

Objective 3

To maintain and develop Train 2000 as a sustainable organisation

By:

6. Maintaining a strong structure for governance that enables effective decision making and direction giving

1 2 3 4 5 DK

7. Ensuring that an effective team is in place using good practices in selection, recruitment, retention and having clear internal communications

1 2 3 4 5 DK

8. Securing appropriate financial resources to allow the implementation of Train 2000's strategic objectives

1 2 3 4 5 DK

9. Implementing a comprehensive marketing strategy for Train 2000

1 2 3 4 5 DK

5. Underpinning all activity with appropriate quality systems and working environments

1 2 3 4 5 DK

Comments

4 Additional Comments

Please add any further suggestions you may wish to make about other objectives you should be tackling; operational practices; or anything else which might help us to improve our social benefit performance.

Comments

If you would be willing to discuss any of your responses further please give your name here.....

Thank you very much for your help with the social audit!

Train 2000 Management Committee Questionnaire

You will know that Train 2000 is undertaking a Social Audit. As part of the Social Audit process we are seeking the views of our main stakeholders. The management committee are an important stakeholder group and so we interested in your views about our objectives, our working conditions and how we operate.

We would be grateful if you could complete this questionnaire and return it to Helen.

We have made the questionnaire as quick and easy to complete as possible but please add comments in the spaces provided and add any other points you may wish to make.

Thank you for your co-operation!

As you know the staff team, and some management committee members, had a development day in April this year, at which the mission, values, objectives and activities of the organisation were discussed. As a result the following revised statements are proposed for use by the organisation. We are seeking your views as to the appropriateness of these, and how well so far you feel that Train 2000 achieves these statements.

Mission

Train 2000 is an innovative organisation that provides quality enterprise and employment services for women and influences policy in order to improve the economic position of women.

Is this the right mission for Train 2000?

Yes No Partly

Comments:

Values

Please score each specific value on the 1-2-3-4-5 scale according to how you think Train 2000 has performed since the beginning of the POWER Programme. Please circle one number: 3 means OK - neither particularly successful, nor especially un-successful; 1 means very unsuccessful; and 5 means very successful.

To be *inclusive*, recognising the needs of individual women and particularly ensuring that we reach and respect the needs of disadvantaged and underrepresented women.

1 2 3 4 5 DK

To be *innovative*, continually improving the way we work and provide services by incorporating new ideas, information and methods.

1 2 3 4 5 DK

To work in *partnership*, adding value to what we do by working with others to build trust, develop mutual understanding and through reciprocal actions develop social capital.

1 2 3 4 5 DK

To strive for *quality*, committing the organisation to improvement and high standards in all aspects of its activities and working environment.

1 2 3 4 5 DK

Are these the right values for Train 2000?

Yes No Partly

Comments:

Objectives and activities

Please score each specific activity under the five objectives on the 1-2-3-4-5 scale according to how you think Train 2000 has performed since the beginning of the POWER Programme. Please circle one number: 3 means OK - neither particularly successful, nor especially un-successful; 1 means very unsuccessful; and 5 means very successful. If you do not know, please circle DK

Please use the comments section to add any other comments explaining or expanding on the score you have given.

Objective 1

To provide a range of quality, client sensitive enterprise and employment services for women in Merseyside.

We do this by:

9. Raising the awareness and aspirations of women across Merseyside regarding their enterprise and employment options through, for example, advertising and coverage in local media, promoting role models and organising awards

1 2 3 4 5 DK

10. Developing and providing accessible services for individual women and groups of women

1 2 3 4 5 DK

11. Developing and providing appropriate enterprise and employment services for individual women and groups of women

1 2 3 4 5 DK

12. Strengthening enterprise networks for women through, for example, effectively working with other enterprise support organisations, banks and business networks

1 2 3 4 5 DK

Comments

Objective 2

To influence local, regional, national and international policy and practices in the are of women's economic development
By:

7. Networking with a range of appropriate organisations and government bodies, formally and informally for example participating in appropriate boards, steering groups and engaging in a range of activities

1 2 3 4 5 DK

8. Gathering information, highlighting issues and identifying evidence based solutions to disseminate appropriately

1 2 3 4 5 DK

9. Representing Train 2000's view on women economic development issues through, in particular, producing policy documents and responding to policy consultation, participating in policy think tanks, conferences, seminars and exhibitions

1 2 3 4 5 DK

Comments

Objective 3

To maintain and develop Train 2000 as a sustainable organisation

By:

10. Maintaining a strong structure for governance that enables effective decision making and direction giving

1 2 3 4 5 DK

11. Ensuring that an effective team is in place using good practices in selection, recruitment, retention and having clear internal communications

1 2 3 4 5 DK

12. Securing appropriate financial resources to allow the implementation of Train 2000's strategic objectives

1 2 3 4 5 DK

13. Implementing a comprehensive marketing strategy for Train 2000

1 2 3 4 5 DK

5. Underpinning all activity with appropriate quality systems and working environments

1 2 3 4 5 DK

Comments

Are these the right objectives and activities for Train 2000?

Yes No Partly

Comments

Additional Comments

Please add any further suggestions you may wish to make about other objectives you should be tackling; operational practices; or anything else which might help us to improve our social benefit performance.

Comments

If you would be willing to discuss any of your responses further please give your name here.....

Thank you very much for your help with the social audit!

Social Accounting Report 2001-2003

Train 2000 Ltd SOCIAL CAPITAL STOCK-TAKE	Yes	So-so	No	Please explain
Trust				
Do we, in general, trust other organisations we work with?				
Do other organisations we work with trust us?				
What can we do where there is a lack of trust?				
To what extent is trust dependent on relations between individuals?				
What will happen to that trust if key people leave our organisation or other organisations?				
Do we use trust in getting things done?				
Reciprocity and Mutuality				
Do we help other similar organisations?				
In what ways?				
Do other similar organisations help us?				
In what ways?				
Are there projects or campaigns we (could) work on together?				
Networks and Information Channels				
Do we have a wide network of contacts?				
Do we nurture our contacts and go out and make new ones?				
Are we aware of all our stakeholders?				
Are we in regular contact with all our stakeholders?				
Are there other groups and people we should be in contact with more?				
Are we able to get good and useful information?				
Do we share information with other organisations?				
How?				
Shared Norms and Values				
Do we have a clear set of values?				
Do all our staff and Board understand our values?				
Do all our staff and Board share our values?				
Do we share these values with the organisations we work with?				
Do we tell others what our values are?				
Commitment and Sense of Belonging				
Do we have strong roots amongst the people we serve?				
Are we truly accountable to our clients?				
Do we involve our clients in our work?				
Do we keep people informed about what we do?				
Other Comments, Discussion or Action Points				

Train 2000 - Green Office Checklist 2004

Paper

Do you photocopy double sided?	Y or N	N/K
Do you open envelopes carefully and store for reuse?	Y or N	N/K
Do you photocopy non-essential copies on re-used paper?	Y or N	N/K
To avoid mistakes, do you trial copy before printing big batches?	Y or N	N/K
Do you use scrap paper turned into useful notepads?	Y or N	N/K
Do you use e-mail whenever possible?	Y or N	N/K
Do you keep copy documents on disk rather than paper?	Y or N	N/K
Are your computer printout margin sizes, fonts etc set to minimise paper use?	Y or N	N/K
Does the office use recycled paper?	Y or N	N/K
Does the office refuse or return junk mail?	Y or N	N/K

Office Supplies

Are long life products chosen over short life ones?	Y or N	N/K
Are materials bought in large packs to avoid excessive packaging?	Y or N	N/K
Do you purchase eco-efficient or “green” products? – recycled, refillable, water based ink etc.	Y or N	N/K
Do you use paperclips rather than staples?	Y or N	N/K
Are aerosol products with CFC propellant avoided?	Y or N	N/K
Do you use environmentally friendly cleaning materials?	Y or N	N/K

General Office

Do you use washable cups rather than disposable ones?	Y or N	N/K
Do you purchase fairtrade or organic tea and coffee?	Y or N	N/K
Do you purchase supplies from local shops?	Y or N	N/K
Is your fridge door seals clean and seal shut?	Y or N	N/K

Recycling

Is all used paper saved for recycling?	Y or N	N/K
Does the office store then recycle glass, cans etc?	Y or N	N/K
Does the office separate and compost materials?	Y or N	N/K
Is there a paper recycling bin next to the photocopier?	Y or N	N/K
Does the office recycle its electronic equipment, toner cartridges etc?	Y or N	N/K
If plastic cups are used are they recycled?	Y or N	N/K
Are you utilising recycling opportunities by co-operating with nearby businesses?	Y or N	N/K

Transport

Do employees have access to dry, secure cycle storage?	Y or N	N/A
If you have pool or company cars do they run on unleaded petrol or diesel?	Y or N	N/A
Do you have information available on prices and timetables of public transport?	Y or N	N/A
Are meeting times organised around public transport timetables?	Y or N	N/A
Are office working hours flexible enough to allow people to use public transport?	Y or N	N/A
Do cyclists receive preferential mileage allowance?	Y or N	N/A
Are employees taught and encouraged to drive in an environmentally friendly manner?	Y or N	N/A
Is it policy to use buses for business purposes whenever possible?	Y or N	N/A

Health and Safety

Is fresh fruit available alongside biscuits at break time or for visitors?	Y or N	N/A
Is clean drinking water available?	Y or N	N/A
Are house plants grown in the office to lower stress and absorb chemicals?	Y or N	N/A
Are Sick Building Syndrome problems identified and corrected?	Y or N	N/A
Is sitting at the computer for long hours discouraged?	Y or N	N/A
Are policies on lone working, safe use of equipment etc enacted?	Y or N	N/A

Implementation

Is there a green office noticeboard in a prominent position?	Y or N	N/A
Does the office have a suggestion box for environmental ideas?	Y or N	N/A
Does the office hold events with a green theme? E.g. a stationery amnesty.	Y or N	N/A
Does the office have an environmental policy?	Y or N	N/A
Is there an opportunity to raise environmental issues at staff meetings?	Y or N	N/A
Is resource use monitored and are environmental effects audited?	Y or N	N/A