

SOCIAL AUDIT

ceu ltd

Final Audited Social Accounts

1st April 2007 – 31st March 2008

Community Enterprise Unit Ltd
69a Sidwell Street, Exeter, EX4 6PH
☎ (01392) 666 281
🌐 ceultd.co.uk
www.ceultd.co.uk

Acknowledgements page

We would like to thank the following people:-

The 26 clients who took the time and trouble to complete our survey, including the 8 who redid 'that darn question!'

Our Panel Members:

Simon Shattock and Colin Farlow, who gave so generously of their time – thank you!

Our Panel Chair, John Pearce, who has steered us through our 3rd panel.

CONTENTS

	Page
1 Introduction	4
2 History and background	5
3 Mission, values, objectives and activities (MVOA)	10
4 Stakeholders	13
5 Scope and methodology of the Social Accounts	14
6 The Report on Performance: analysis of the Social Accounts	17
7 Environmental impact	41
8 Economic impacts	41
9 Compliance	42
10 Main issues and achievements, conclusions & recommendations	43
11 Strengths and weaknesses of the Social Accounting Process	45
12 Plans for the next Social Accounting Cycle	46
13 Dialogue and disclosure	46

Appendices:

- I. Profit & Loss I April 07 – 31 March 08
- II. Social Accounting Plan
- III. List of Stakeholders Consulted
- IV. Quantitative Training Record
- V. Example training feedback form
- VI. Example Client Service Satisfaction form
- VIIa. Client questionnaire
- VIIb. Staff questionnaire
- VIII. Staff Training summary
- IX. Previous summary report including Social Audit Statement
- X. Company CV

Introduction

In writing these draft Social Accounts it amazes me when I stop to reflect on how the organisation has developed since it was established some 10 years ago and indeed since the last time we produced social accounts in 2005. Our staff numbers have doubled and we have seen two team members leave for pastures new. The diversity of cultures in the office has been fascinating with employees from Nigeria, Germany and Italy joining the team at different stages.

We have had to meet some real challenges with a founding director and key team member leaving us for a year to have her daughter. Nevertheless we have risen to the challenge with new team members stepping into the breach enabling us to make a profit for the first time in 3 years.

We have diversified in order to survive by adding several new courses to our portfolio of services, gained Project Management experience with two significant new build community assets and catered for an extended client group – again out of necessity.

We have continued to network and be good partners holding seats and actively participating on the boards of 3 external organisations. We have invested considerable time and money into developing our own organisation through employing someone a day a week to do our strategy development – culminating in new work and what I think looks like a very impressive printed company CV.

We have also continued to host the UK Social Audit Network (SAN) at our offices providing office, book-keeping and company secretary functions for them.

Finally with a grant of £2,000 from the Co-op together with lot of time (and stress) for one of our team we have developed our website to be a useful resource to visitors and our own clients and trainees, for the first time offering an easy to update resource section accessible to the user through passwords.

All in all, quite a year!

Debbie Stewart

CEU Social Accountant, Author of Social Accounts

March 2008

In 2002/2003 we produced our first full set of social accounts which was verified by an external panel. We also produced an 8 page summary which was sent to key stakeholders, made available on our website and is used as an example at training sessions.

Due to pressures of work in 2003/2004 we were unable to produce a full set of social accounts and opted, instead, to publish an Annual Report. Included in the report was an update of progress on recommendations identified in the previous Social Accounts. Again this was sent to key stakeholders, posted on our website and used in training sessions.

We produced our second set of fully audited social accounts in 2004/5 and a summary which was again widely circulated with the full accounts made available as a downloadable file on our website. This is the third time we will be going to a full Audit Panel and on this occasion Debbie Stewart has fulfilled the role of Social Accountant, designing questionnaires and drafting these accounts.

For this cycle we have focussed on two of CEU's four Aims:

Aim 1 - To deliver high quality business advice, training, information and support services to meet the changing needs of our clients

Aim 4 - To be considered a great place to work by the staff team

NB: Recommendations for Action are found throughout the accounts, and then summarised in Section II.

History and Background

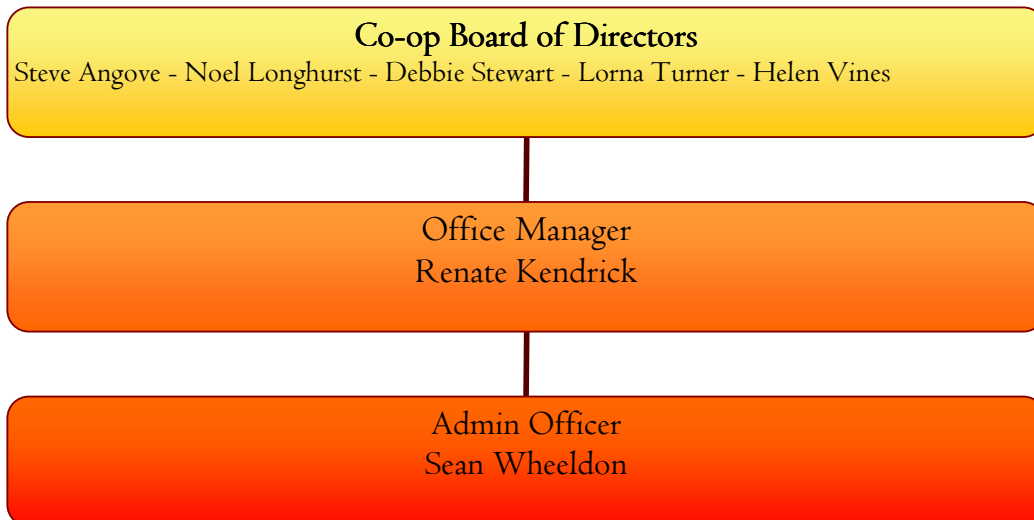
The Organisation

2.1 Our Organisation

CEU Ltd is a social enterprise registered at Companies House as a company limited by guarantee with a common ownership (not-for-private-profit) Memorandum & Articles of Association (M & A) in March 1998. Our M & A reflects that we operate as a Worker Co-operative where only workers may be members of the Co-operative and all members are entitled to a place on the board after serving a satisfactory probationary period. We are based in Exeter in Devon though our work takes us across the South West region, and into South Wales.

2.2 Our Team

Our Team has grown in the last couple of years from 3 employees (2.5 Full-time equivalent) to 7 employees @ 4.02 F/t equivalent and we now have:-



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

2.3 Our Services

CEU's strap-line is "*working with enterprising communities*".

Our team has been delivering support to emerging and established social enterprises within Devon for ten years and in Somerset approaching five years. We work with a range of organisations including community businesses, co-ops and development trusts. We also work with local authorities and other agencies and partnerships supporting community-based regeneration.

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

During the social accounting year we had a facilitated strategy day to look at the services we could/should be offering given our additional team members. These now include; **Business Support, Quality & Impact** including Social Accounting and Audit, **Training & Facilitation**, and **Research**. In addition out of a simple need to survive financially we have also undertaken two contracts to act as **Project Managers** in Ivybridge and Princetown, roles which have greatly enhanced the CV's of those involved.

By way of an introduction the following is a flavour of the work we've been doing under these headings.

Business Support

Core to our mission we have been providing business support to social enterprises since we set up. We have been able to deliver this support free of charge to enterprises in Somerset, Devon & Dorset during the accounting year, funded through two significant contracts. The first is a service level agreement (SLA) with **Somerset County Council** (SCC) where we were contracted to deliver support to a number of existing and emerging social enterprises. The other is a contract with **Wessex Reinvestment Society** (WRS) supporting them to deliver certain outputs for South West Regional Development Agency (SWRDA) and for Barclays through the Financial Inclusion funding they had received. It should be noted that although the contract enabled us to work in Devon, Dorset and Somerset we didn't actually receive enquiries from Dorset and did all of the work in Devon for WRS as we already had funding in Somerset. A third contract with the **Active Communities Unit** has seen us venturing into Cornwall as well as supporting a client in Somerset.

Quality and Impact

Social accounting and auditing, or measuring the social, environmental and economic impact of the work an organisation does, is core to CEU's work. It also supports the Business Support and Training Aims:

- During the accounting year we have delivered an accredited training programme in Social Accounting and Audit in Somerset to a cluster of 4 social enterprises.
- We have also co-delivered an Introduction to Social Accounting on behalf of Community Business Scotland Network (CBSN) for the Prowess (women in business network) in London.
- We have also chaired social audit panels for two organisations during the year.

Training & Facilitation

Training

We have continued to deliver training in Business Planning for Third Sector Enterprises, accredited through the Open College Network at levels II & III and more recently the newly re-accredited course in Social Accounting and Audit. We also devise tailored training to meet clients' specific needs, covering a range of issues and this year have written two, new days of training for the WRS contract. These were both one day courses titled:-

1. So you want to start your own business
2. Financing your own business

This provided a slight deviation from our usual client group as the first course was targeting the unemployed and the second included commercial as well as social enterprises in order to satisfy the SWRDA targets we were tasked to deliver.

In addition we have written and delivered new training for Somerset County Council in Marketing for Credit Unions, Managing Your Finances and Achievable Sustainable Funding.

Facilitation

We have provided facilitation for a range of clients in subjects such as visioning, as part of their strategic planning and as part of a wide consultation on the future Management Plan for an Area of Outstanding Natural Beauty (AONB). Additionally we have delivered workshops on behalf of a number of organisations including UK Social Audit Network (SAN) and Somerset Community Food Projects Network.

Project Management

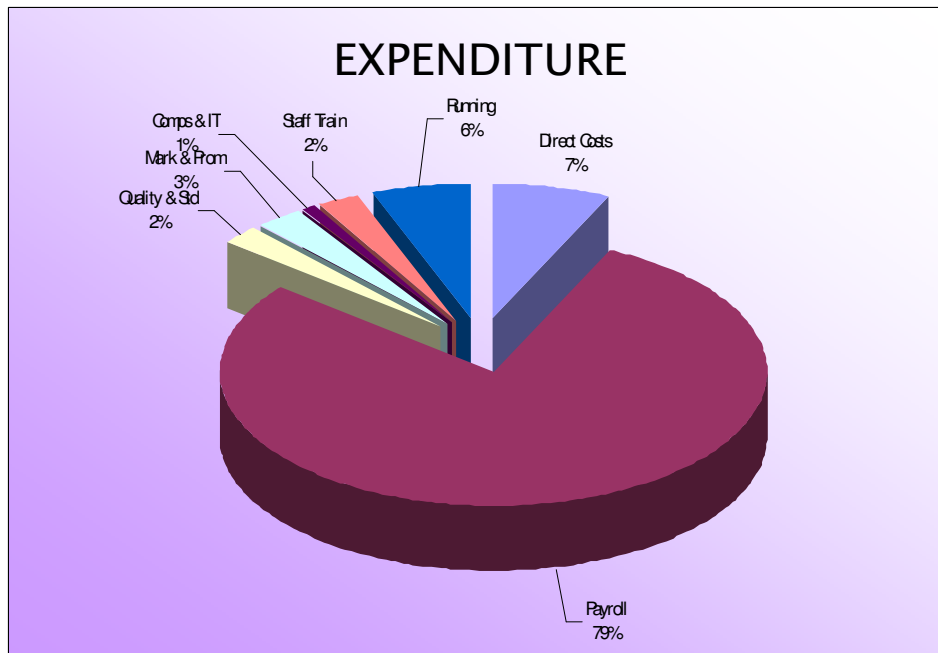
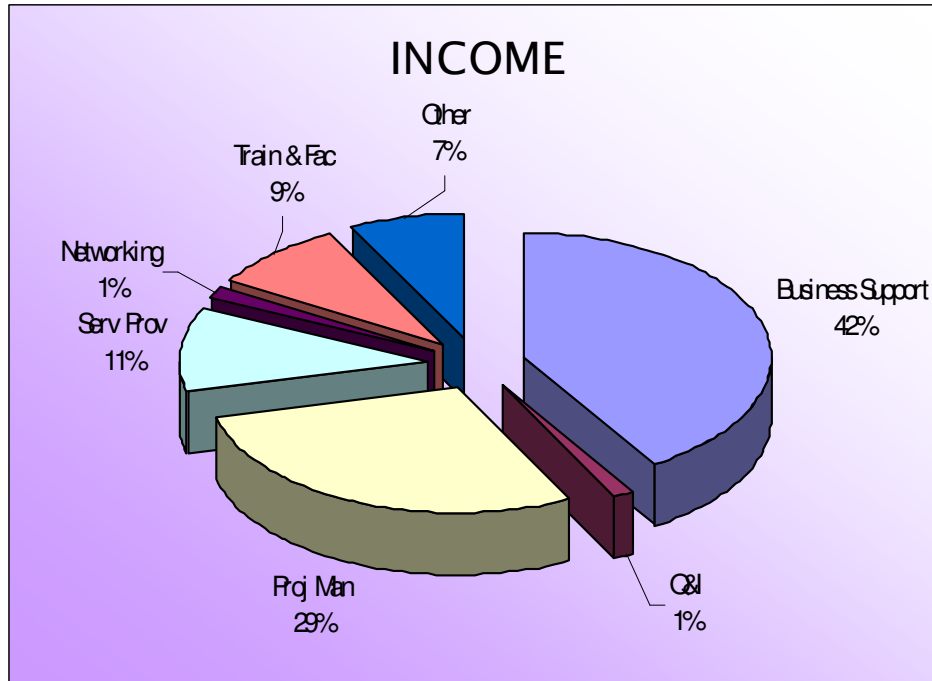
1. The Watermark Building, Ivybridge – a £4.1m, 3 floor community centre comprising library, information centre, cinema/conference/theatre space and business centre comprising 16 start-up business units. We have fulfilled a one year contract with Ivybridge Town Council on a 2 ½ day a week basis carrying out a range of activities from securing grants for solar panel installations, co-ordinating strategic board meetings, researching box-office and till systems, preparing tendering processes to comply with the Official Journals of the European Commission and completing on-line grant claims with the Government Office.

2. Duchy Square, Princetown – a new build project providing an integrated business complex of 17 small work units, a teaching studio and a gallery / exhibition space for the development of high quality arts and crafts enterprises, particularly for new entrants in creative businesses.

The project management role was based on 12 days work focussing on drafting the tender documents for a site operator in compliance with Official Journals of the European Commission, ensuring this met legal requirements for this project required by SWRDA and being part of the panel to evaluate the tenders received. The work was carried out between July and December 2007.

Financials

We earned all of our income which totals £144.6k (as at 31 March 2008) apart from a grant for £2,000 from the Co-op for our website development, bank interest of £142.82 and a miscellaneous amount of £43.95. Total expenditure was £143.1k. The charts below show a % breakdown of income and expenditure. Full accounts are lodged annually with Companies House.



For further information on our finances for the period see our *Profit & Loss Account at Appendix I.*

The Social Audit

The period of the social accounting process is for the year **1st April 2007 to 31st March 2008**. Lorna and Debbie led on setting the scope of the social accounts and were conscious of the need to make it manageable given Helen's absence on maternity leave. We have therefore elected to focus on 2 of our 4 Aims this time. We held initial meetings to look at who our stakeholders are and develop the social accounting plan. Lorna was going to take on the role of the Social Accountant as an induction into the process however, pressure of work meant the decision was taken for Debbie to pick this up back in November given her experience of the process.

Debbie designed the two questionnaires and sent them for checking and comments to all the directors. Debbie has taken the lead in drafting the accounts but has looked to Sean for help with the quantitative data, Renate and Lorna for help with the financials and additional input.

Mission, values, objectives and activities

Lorna, Debbie & Helen agreed that in view of the need for Helen to wrap up work ready for a handover before going on maternity leave, Lorna and Debbie would review and agree our Mission Aims and objectives in readiness for the Social Accounting process. They met a number of times in February and March and finally firmed up the scope of the Social Accounting on the 3rd April 2007 when the Social Accounting Plan was created. (See *Appendix ii*) and social book-keeping methods introduced. At that time Noel had only been with the Co-op a few weeks (2nd Feb) and Renate, (9 July) Steve (23 April) and Sean (Oct) had not yet joined.

Mission:

To provide quality business advice, training and support to help create a vibrant and growing social economy which provides quality products and services and creates good jobs for the people in that economy.

Values:
Being supportive of our peer team
Supporting Fairtrade – through our social and local purchasing policy
Treading lightly on the Earth – through our green house keeping policy
Fostering positive partnerships – working mutually with honesty and integrity
Enjoying what we do and celebrating what we achieve
Trying to always be approachable and accessible
Striving to be a fair and equitable employer

Aim I

To deliver high quality business advice, training, information and support services to meet the changing needs of our clients by:

- a) Offering a range of training, accredited and unaccredited

- b) Researching with clients current and potential products and services by end 2007
- c) Developing products to work alongside the services offered
- d) Providing business advice tailored to the needs of our clients
- e) Overhauling and maintaining an up-to-date website linking to relevant information sources by end July 2007
- f) Offering facilitation, evaluation and strategic planning services
- g) Achieving and maintaining appropriate Quality Standards for the sector such as Investors in People (IiP), Institute of Business Advisers (IBA)

Aim 2

To be recognised as a leader in the Quality and Impact field within the South West by:

- a) Chairing of at least 2 social audit panels per year to maintain UK SAN approved auditor status
- b) Being an active member of the UK Social Audit network by attending meetings, contributing to on-line services and promoting the services of SAN
- c) Actively promoting our own work in Quality and Impact through our own website and publishing of articles
- d) Being a recognised credible voice 'on the ground'
- e) Delivering at least 10 days Social Accounting + Audit training

Aim 3

To be financially sustainable by:

- a) Securing larger premises and generating rental income – initial research through to end 2008 but dependent upon opportunities.
- b) Strengthening relationships with existing clients to obtain new / additional contracts and looking to secure for maximum length
- c) Raising our profile through active networking and positive partnership-building
- d) On-going review of market requirements and planning for likely political / structural changes
- e) Developing product range for stand alone sales. Target – develop one new product for stand alone sales by end 2008.
- f) Proactively seeking new income streams
- g) Identifying and securing resources to develop services and products based on needs of our clients

Aim 4

To be considered a great place to work by the staff team by:

- a) Constantly striving to improve quality of our policies, procedures, systems and environment allowing staff to perform their jobs to the best of their ability
- b) Supporting staff through time and resource within the means of the company for personal and professional development
- c) Striving to ensure the co-op's members maintain a healthy work:life balance

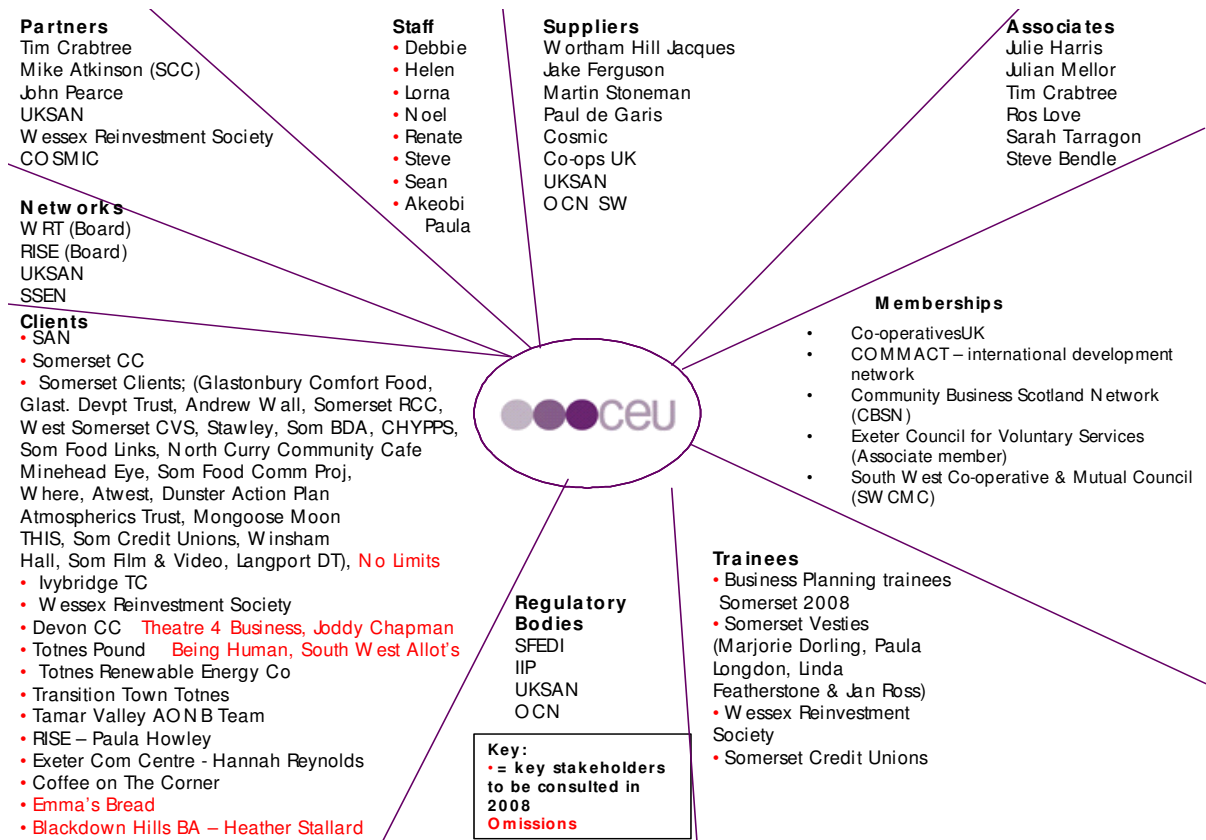
- d) Taking the time to talk through issues with respect and consideration and finding (and acting) on solutions
- e) Maintaining awareness that productivity is a combination of skills, physical and emotional well-being and that all three areas should be considered
- f) Evaluating the company's performance against this objective through reviews and the Social Accounting and Audit.

Stakeholders

The Stakeholder Map showing all of our stakeholders during the period is shown on the following page. In terms of the *Key Stakeholders* they were chosen according to who would be fitting given the aims and objectives that are within the scope of the exercise, eg Aim 1 – All clients and trainees, Aim 4 – all staff, i.e. all paid employees. Lorna and Debbie identified these.

Partners were not consulted directly as a distinct category – all of those worked with during the social accounting period were consulted as clients. Tim Crabtree and COSMIC were not worked with during this period.

A list of all the individual stakeholders that were consulted or omitted can be found in *Appendix iii*.



Scope and methodology of the social audit

Omissions

We have chosen to focus on Aims 1 & 4, thereby omitting Aims 2 & 3 this time. This is because we did not want to set ourselves up to fail by being over ambitious and in terms of priorities with so many changes in the staff team we felt it important to consult staff and with the upheaval in the business support sector we felt it timely to consult our clients whilst undertaking some market research.

The stakeholders that were omitted include any stakeholders who were not one of the following categories; **staff, clients or trainees**. This was because we felt these were the key stakeholders to consult to get the essential feedback in relation to the chosen objectives.

Where clients or trainees were given evaluations to complete immediately after the piece of work or training attended we have made a judgement whether or not it is appropriate to consult them again or whether it is a) too soon to bother them again or b) we already have the feedback we require as part of the consultation exercise.

Three clients who we'd intended to consult were inadvertently overlooked - No Limits in Somerset, Emma's Bread and South West Allotments in Devon. There was one client that we didn't have email details for and should have sent a paper copy of the questionnaire but forgot – West Mendip Credit Union. There were a couple of clients that were not deemed to be key stakeholders having only received an hour or two's support either at the very start or at the end of the period, after the consultation had taken place. We considered they would not have had sufficient experience of engaging with us to be able to participate in a meaningful way in the consultation.

Methodology

Social Bookkeeping

In our first time of social accounting we had to go back through each team member's work diary to compile the quantitative data which was a real stretch. In the second year we tried keeping a social accounting diary to record things as we went along, however, as it lived in the admin office we weren't very good at keeping it up to date. This year we took a piece of flipchart paper and set out a matrix of the evidence we needed to gather against our chosen objectives. This can be examined as part of the Social Audit Trail but is too large to append. It has worked really well and although pressure of work means it wasn't right up to date at the time of drafting these accounts a huge amount of information was already there and it has not taken much time to update it.

Stakeholder Consultation

There have been two main methods of consulting stakeholders:-

1. Evaluation forms given to trainees or clients immediately or soon after the work

With the training feedback forms, each set of training forms for a piece of training has been aggregated shortly after the event so that a summary can be referred to in drafting the accounts.

2. Online questionnaire using Survey Monkey

The online questionnaire to clients was sent out by email using the Blind Carbon Copy function to preserve the privacy of our stakeholders. Clients were asked to provide their contact details if they wished to be entered into a prize draw (to be done on Panel day) but could choose to remain anonymous if they so wished. Out of 26 respondents only 2 have not provided their names.

Problems:

Even after twice piloting the questionnaire, one question (which was more to do with our market research than the social accounting) had an error which prevented respondents from selecting more than one service which they may use in the future. 16 Respondents had completed it before the problem was spotted. The same question was corrected and sent out as a separate question to those same 16 respondents of whom 8 took the time to fully complete it. This must be borne in mind in counting up the responses!

Category/Method	No Consulted	No Responses*	Total / %
Staff – Online Questionnaire	7	7	100%
Client – Online Questionnaire	50	26	52%
Client – Service Follow Up Questionnaire	3	3	100%
Trainee Feedback Forms	248	215 (<i>see below*</i>)	87%
Totals	308	251	81%

No. courses / workshops	No. days	No. trainees	No. Trainee days	No. individuals	No. feedback forms
26 (a)	36.29 (b)	312 (c)	287.36 (d)	273 (e)	215

(a) 26 courses delivered

(b) Some courses were ½ day and some were up to 7 days so the amount of time spent delivering them was added equalling 36.39 days

(c) This is the total number of trainee attendances. Some trainees attended more than one course so it is not the number of individuals which is shown at (e)

(d) This is how many trainee days were actually taken up by the 273 individuals in attending the courses on offer

Because some participants have completed trainee feedback forms for several sessions during one course and they are able to do it anonymously it is impossible to give an exact figure as to how many were consulted or responded. Therefore the figure in the table above equates to the number of feedback forms returned and for simplicity I have used that as a minimum baseline figure and added the number we know who were given but didn't return completed forms.

The Respondents to the online consultation come from the following sectors:-

Which of the following describe you or your organisation?		
Answer Options	Response Percent	Response Count
Social Enterprise	50.0%	13
Voluntary Sector Organisation	42.3%	11
Private Sector individual	3.8%	1
Private Sector Organisation	3.8%	1
Local Authority	11.5%	3
Public Agency	0.0%	0
<i>answered question</i>		26
<i>skipped question</i>		0

(NB. 3 respondents selected more than 1 category hence a response rate of 111%)

And cover the following sectors in terms of the work they do:-

Which sector describes the primary area of your work?(you may choose more than one answer)		
Answer Options	Response Percent	Response Count
Social Economy	46.2%	12
Other	3.8%	1
Voluntary Sector	38.5%	10
Local Food Sector/Farming Agriculture	15.4%	4
Environment	19.2%	5
Arts	3.8%	1
Care	7.7%	2
Local Government	19.2%	5
Other*	34.6%	9
*Other (please specify)		11
Arts and Crafts Tourism Regeneration Economic, social and cultural development for the community Affordable complementary therapy Transport provision to the elderly, disabled and rurally isolated Education, global issues Education CSR Local Government and the social economy Community development		
<i>answered question</i>		26
<i>skipped question</i>		0

Drafting the Accounts

The Social Accounting Framework has been used for the drafting of these accounts as provided on the CD ROM with the manual. Rather than replicate that in the appendices (at the risk of making this document too cumbersome) it can be seen on the SAN website or examined as part of the audit trail. Basically the headings follow the framework and the text underneath follows the guidelines provided in terms of order and presentation.

The Report on performance: analysis of the Social Accounts

Values

This time we have only consulted staff about how they feel we live up to our values having consulted all stakeholders on values in 2004/05.

The following are CEU's Values please rate them according to how well you believe the team manages to live up to them:

Answer Options	Always	Mostly	Some-times	Never	Don't know	Response Count
Being Supportive of our Peer Team	3	3	0	0	1	7
Supporting Fair Trade through our purchasing policy	1	4	1	0	1	7
Treading lightly on the earth - through our green housekeeping policy	1	3	2	0	1	7
Fostering positive partnerships - working mutually with honesty and integrity	5	1	0	0	1	7
Enjoying what we do and celebrating what we achieve	3	3	0	0	1	7
Trying always to be approachable and accessible	4	2	0	0	1	7
Striving to be a fair and equitable employer	5	2	0	0	0	7

Supporting comments are in full below:-

- *Not sure how much the fair-trade and green policies are actually implemented as not involved in those decisions.*
- *I think these values are appropriate and important*
- *I think just about every answer given above will be affected by high work load, uncertainty and stress. Inevitably, these factors will have a detrimental effect on morale and the working environment*
- *I think it is really relevant to raise these and certainly the last year, due to pressures on income-generating that we have had to face, has possibly meant that some of these have been 'less obvious' in our organisation than the past.*
- *We endeavour to celebrate and acknowledge others' achievements but perhaps could do more.*
- *Again, this is taken over the last 12 months so lots of don't knows. i think the intent behind each value is still important. I suspect they are hard to measure, particularly the being approachable and accessible one. I feel that the board have been very fair and equitable with me over the last 12 months with regard to maternity leave and pay, thanks! I am interested to know the views of more recent staff as these were developed some years ago by founder members and it is good that the values should be reviewed and revised.*
- *I do still feel these values are very relevant. However, I also know that I am an obsessive recycler and have had to relax about the fact that it's not always viable as a business to recycle as recycled printer cartridges don't work so well and our office staff seemed to be fed up with the amount of recycled envelopes stored up.*

- *I could use public transport more, particularly when not so pressured time wise and must look to do so.*
- *We have been quite good at going out for lunch as a team, to both welcome and say goodbye to staff members and celebrate Christmas and reaching 10 years.*

With regard to our Mission, again we only consulted staff as follows:

CEU's Mission is "To provide quality business advice, training and support to help create a vibrant and growing social economy which offers quality products and services and creates good jobs for the people in that economy

How appropriate do you think the Mission is? (if you think it needs amending please tell us in what way)

The full set of individual responses is shown below.

1. *appropriate*
2. *It is good but we do work beyond the social economy, Also, if we are so specific we should have a very clear idea of what we mean by the social economy*
3. *quality is inexact e.g low quality! would 'respected' be better referring to other people's judgement of the work*
4. *It is appropriate but uses the word quality once but not 'professional' or some other term demonstrating qualifications*
5. *I feel comfortable with the Mission but will be very interested in the views of others*
6. *seems appropriate though in the current climate does it provide us with sufficient markets?*
7. *I think it's an admirable mission but proving more difficult to achieve in the current financial climate with the contract changes. This is clear when looking at the position many of our peer organisations are in, even those larger and longer established than CEU.*

Conclusion & Recommendation No.1

As a staff team, CEU will review the Values and Mission in 2008/9, reflecting the views above. Consideration will be given to identifying internal/external values and tailoring future consultation on the Values to internal/external stakeholders.

Objectives and activities (it should be noted that in CEU we refer to Aims and Objectives)

The two Aims which form the scope of this years' social accounting exercise are repeated here with their associated objectives together with the quantitative and descriptive account of what we have done towards their achievement:

Aim I

To deliver high quality business advice, training, information and support services to meet the changing needs of our clients by:

- a) ***Offering a range of training, accredited and unaccredited – See Appendix iv – Quantitative Training Record***

This has been a busy year for CEU in terms of training and has introduced Lorna to delivering training for the first time and brought Steve Angove, an experienced trainer into the fold. As usual we have delivered training primarily on behalf of other organisations such as Somerset

County Council, RISE and Wessex Reinvestment Society under contract. On reflection in writing these accounts it has only just occurred to us that of those courses only one was already in existence in its current form and able to be delivered with only minor updates. All the others have been written and piloted this year to meet the needs of our contractors.

We have delivered **14 different training courses**, some on more than one occasion totalling 26 training (or workshop) events. Two of the courses, Business Planning for Third Sector Organisations and Social Accounting and Audit, are accredited courses with the South West Open College Network. We have spent 36.29 days delivering those to **273 attendees** providing 287.36 trainee days. Some individuals have attended more than one course, where they have attended a course of more than one session their attendance has not been counted more than the once.

Qualitative Feedback

We gathered feedback from 215 individual trainee attendances, although it should be noted that the training we did for RE4D we were only provided with the summary by the client rather than the individual feedback forms.

Whilst there are far too many individual comments to be repeated here, the following provides a balanced extract of comments from across the range of type and length of courses delivered, where CEU’s evaluation form was used. All learner feedback is available to the Audit Panel for scrutiny. See **Appendix V** for Trainee Feedback Form

I. Prowess Awareness Workshop in Social Accounting and Audit 24/5/07 London – delivered to Prowess members on behalf of Community Business Scotland Network.

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<ul style="list-style-type: none"> ▪ Excellent content & presenters ▪ Having a case study presented by an individual involved in the process was helpful and the opportunity to ask her questions was great ▪ Interaction – encouraging us to think and work ▪ Introductory session on financial accounts ‘v’ social accounts ▪ Visuals. Informal approach 	<ul style="list-style-type: none"> ▪ I didn’t feel I got a sense of what social accounting actually involves on a practice level....I think there could have been a clearer explanation ▪ The first video – a bit too long ▪ Length – I would have preferred a longer, more ‘in depth approach’ ▪ Felt a bit rushed – think one day introduction would have been better ▪ More information on costs and reality (size of business can do it...ANY)

Conclusions: This ½ day session worked well with 2 trainers but we could easily have filled a longer slot for such a large group with 24 attendees.

2. SFEDI Standards Training for Business Advisers in social enterprise delivered over 3 consecutive days for RISE in Bristol – 10-12 May 2007

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<ul style="list-style-type: none"> ▪ Debbie did well to facilitate the group considering the range of participants and strong personalities present ▪ Explained very well – depth could be covered in further detail ▪ Good fast pace ▪ Good group work exercises ▪ Debbie’s delivery was clear and easy to understand and she delivered the course with humour, empathy and humility. 	<ul style="list-style-type: none"> ▪ Well explained but not enough depth ▪ Not always sure we knew what we were supposed to be doing ▪ (Were the sessions covered in enough depth and explained well?) not really ▪ Nothing new ▪ The course is at a less advanced level than I was expecting. Would have liked more detail; in specifics.
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Conclusions: This was a 3 day course delivered to 12 participants who were either advisers or social enterprise practitioners. It is a challenge to (infrequently) deliver materials written and marketed by someone else, which is reflected in some of the feedback. In addition, sectoral requirements for some funding contracts currently requires practitioners to attend training so learners come with a mix of motivations and preconceptions about the value of training and their own levels of knowledge and experience. This has proven to occasionally create a difficult learning environment for learners and tutor alike!

3. Legal Structures and Finance for Renewable Energy Projects – 1 day co-delivered to 24 participants on behalf of Renewable Energy 4 Devon as part of contract with Wessex Reinvestment Society

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<p>What was most useful?</p> <ul style="list-style-type: none"> ▪ It was all very useful ▪ Presentation of business structure ‘select-a-structure’ ▪ Brilliant ▪ The day was great, very inspiring, I hope you run lots more because they are clearly very valuable 	<p>What was least useful?</p> <ul style="list-style-type: none"> ▪ Part of legal structures because we have one already ▪ Could have done with action based activity after lunch (sorry eyes were drooping) ▪ Venue was cramped ▪ Delegate list and contact details would be nice
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Conclusions: A very well received day for a course being piloted. The format seemed to work well on the whole including having 2 presenters. Administration being done by separate organisation can pose challenges, in terms of eg. ensuring joining instructions and directions are sent out, the size and quality of the venue etc.

4. Marketing for Credit Unions – session 1 of 2 delivered on behalf of Somerset County Council to 13 participants from credit unions in Somerset.

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<p>What did you find most useful...</p> <ul style="list-style-type: none"> ▪ Good approach allowing free discussion ▪ ...excellent that it started by defining business (rather than marketing) objective 	<ul style="list-style-type: none"> ▪ Too long ▪ Parking could be a problem ▪ ‘Know your customers’ – too diffused as many categories
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<ul style="list-style-type: none">▪ Ideas from floor : Sheets to evaluate existing practice and from which to target new practice	<ul style="list-style-type: none">▪ Encourage Tutor to 'Market' introduce herself, organisation and background info.
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Conclusions: A well received day for another course piloted to a specific group.

5. So you want to Start Your Own Business – a one day course delivered for the first time to 5 unemployed people on behalf of WRS in Taunton.

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<p>What is the most important thing you learnt?</p> <ul style="list-style-type: none"> ▪ Production requirements of business plan, very useful ▪ Not to rush into things – to be thorough and focussed ▪ Importance of planning ▪ Very enjoyable day ▪ Covered a lot in a day - great 	<ul style="list-style-type: none"> ▪ Address of venue not supplied ▪ The address of the venue was not provided ▪ No address or map provided ▪ More details and directions to venue
--	--

Conclusions: A day that, despite the cock-up on our part in failing to send out proper joining instructions, was very well received by the trainees. Unfortunately we were severely under-resourced at the time leading to some confusion as to who was doing what. A lesson learned and hopefully never to be repeated.

6. Achieving Sustainable Funding – Day One of 2 sessions delivered in Bridgwater to 12 participants.

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<ul style="list-style-type: none"> ▪ Inspiring and thought provoking ▪ Trainer enthusiastic and engaging ▪ The trainer was able to relate his particular experience to a number of situations ▪ All areas were good ▪ An excellent day which would be hard to improve 	<ul style="list-style-type: none"> ▪ Thought level/depth could be a bit more advanced ▪ Couldn't find it – no signs ▪ Room very stuffy ▪ Categories of funding exercise (<i>least useful</i>) – knew all of these beforehand ▪ Perhaps using different learning methods may keep us even more engaged
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Conclusions: the course appears to have been very well received and the only criticisms are about the administration other than from one participant who was at a more advanced level than the course was pitched.

A balance of a few more comments, drawn from other pieces of training, are detailed below:-

- *I thought it was the best bit of training I have had, I felt I learnt lots, and even better considered I grew in confidence around the concepts of social enterprise and business advice generally*
- *Group work is very useful. Help us to learn from each other experiences. Reading helps us to retain the subjects.*
- *Very confident approach to the session put people at ease*
- *The room was cold in the morning session.*
- *Very good, informal but informative, not too much “technical jargon” – kept interesting*
- *simple things people had ‘got’ were over explained taking up too much time. Too many anecdotes, what we covered could have been put successfully in an hour.*
- *Use Steve again – very friendly easy to chat too.*

- *Really friendly, helpful and informative. Thank you!*

Conclusions & Recommendations No. 2, 3 & 4

CEU has written and delivered a lot of training this year, much of it for the first time. Feedback has, overall, been extremely encouraging with the vast majority of learners rate the training as either “excellent” or “good”. It is a fact that in a room of 11 or more people you are likely to encounter someone with whom you just don’t ‘gel’ and we think that has occurred for two of us this year with about 4 people judging by their blatant negativity throughout their feedback. I’m not honestly sure what you can do about that other than try not to take it personally, look at what they have to say objectively and remain professional in delivering the best service you can. In addition we need to ensure that any marketing (CEU’s or contracting organisations’) pitches courses appropriately so that learners come with realistic expectations of what level the learning is at. This is particularly important when CEU is delivering other’s materials.

- (2) We will look at standardising our training feedback forms so that they can be entered on a database so that reporting can be far more sophisticated, including % responses.*
- (3) We need to ensure that if our direct client is choosing & booking the venue and dealing with joining instructions we need to liaise with them to ensure the i’s have been dotted.*
- (4) Finally, it would be useful for the trainers to meet as a team to review the feedback quarterly (in addition to the trainers looking at them immediately) and decide what actions if any should be implemented.*

b) Researching with clients current and potential products and services by end 2007

This slipped a year but nevertheless we have done it as part of this social accounting exercise. The reason for this slipping has been the same reason that will be given undoubtedly many times throughout this document, namely that we are a small team with ambitions that don’t always reflect our capacity.

The questions asked and responses can be seen below.

Which of the following services are you aware that CEU provides?		
Answer Options	Response Percent	Response Count
I've heard of you but wasn't sure what you did	0.0%	0
Business support	88.5%	23
Training - Off the Shelf	53.8%	14
Training - Written to fit the client's needs	61.5%	16
Facilitation (eg: strategic planning days)	65.4%	17
Research	23.1%	6
Project Management	26.9%	7

Quality and Impact (evaluating social and environmental impact)	57.7%	15
Website - for information and useful links	26.9%	7
<i>answered question</i>		26
<i>skipped question</i>		0
Of those services which ones have you used so far?		
Answer Options	Response Percent	Response Count
Business support	53.8%	14
Training - Off the Shelf	34.6%	9
Training - Written to fit the client's needs	23.1%	6
Facilitation (eg: strategic planning days)	26.9%	7
Research	15.4%	4
Project Management	11.5%	3
Quality and Impact (evaluating social and environmental impact)	23.1%	6
Website - for information and useful links	0.0%	0
N/A I haven't used any yet	3.8%	1
<i>answered question</i>		26
<i>skipped question</i>		0

Conclusion

These questions were particularly pertinent in reflecting on the first time we asked this during our first social accounting exercise. It shows a much greater awareness of the range of services than previously, when people only knew about the services they had taken up. This suggests that our subsequent marketing has been quite effective. Since then CEU has invested in marketing - direct outputs of this have included a new logo and branding guidelines, leaflet, pop-up banner, company CV, website (twice revised) and a company director – Lorna’s first involvement with CEU was to help us sort out our marketing!

How likely are you to use any of the following services in the future?					
Answer Options	Very likely, more than once	Quite likely at least once	Possibly but not sure	No chance!	Response Count
Business support	9	2	2	0	13
Training - Off the Shelf	3	1	2	0	6
Training - Written to fit the client's needs	0	3	3	1	7
Facilitation (eg: strategic planning days)	3	1	3	2	9
Research	0	3	4	1	8
Project Management	0	1	4	2	7
Quality and Impact (evaluating social and environmental impact)	2	3	1	1	7

Website - for information and useful links	2	0	4	1	7
Number	Response Date	If you are unlikely to use any of our services in the future please tell us why?			
Survey only lets you click one at a time - would use more, but depends on the future direction of the Team I work in and how we are able to support community groups in the future.					
We are likely to use Project Man & Training - system only allows 1 option!					
Could not put in my answers here - problem with ticks!					
Not a definitely not, just I wouldn't consider it to be CEUs main expertise. But RISE would likely put out to tender, so if you bid, it may be so!					

Having seen that the questionnaire had a gremlin the first 16 respondents were sent the question again this time enabling them to select more than one answer. This produced the following additional responses:-

How likely are you to use any of the following services in the future?

Answer Options	Very likely, more than once	Quite likely at least once	Possibly but not sure	No chance!	Response Count
Business support	2	3	2	0	7
Training - Off the Shelf	1	4	1	0	6
Training - Written to fit the client's needs	2	1	4	0	7
Facilitation (eg: strategic planning days)	1	2	5	0	8
Research	0	2	6	0	8
Project Management	0	1	6	0	7
Quality and Impact (evaluating social and environmental impact)	0	3	4	0	7
Website - for information and useful links	4	3	1	0	8
If you are unlikely to use any of our services in the future please tell us why?					2

1. Difficult for us to say until we formulate a strategy for the future.
2. Only because I was not the one to engage your services - this was presumably done via the County Council. But certainly I would be happy to recommend the CEU for anyone who was looking for the kind of services you provide.

Conclusion

Although the sample size was relatively small it has demonstrated that there are some existing clients who would want to use certain services in the future. What may need to happen next is consultation of potential clients to find out why they are not yet using our services. Capacity to do this will remain an issue!

We plan to put on a programme of our own training courses in the 2008/09 year and would like to know which if any of the following subject would be of interest to you?

Answer Options	Response Percent	Response Count
Achieving a Sustainable Future	65.0%	13
Business Planning	45.0%	9
Performance Improvement (eg: Social and Environmental Accounting)	30.0%	6
Asset Development and Management	25.0%	5
Project Management	25.0%	5
Business Start-up	20.0%	4
Financial Management	30.0%	6
Basic Marketing	25.0%	5
Access to Finance	45.0%	9
Answered Question		20
Skipped Questions		6

We are keen to know what our clients feel is a fair price to charge for training and what their organisations can afford to pay. (We appreciate the answers may not be the same to each question!) Please answer the following

Answer Options	£0 - 49	£50 - 100	£100 - 150	£150 - 200	£200 - 250	Response Count
What do you think is a fair price to pay for a a member of staff to receive a day of good quality training, excluding lunch?	4	11	4	0	1	20
What could your organisation afford to pay for a day of good quality training excluding lunch?	8	9	2	1	0	20
answered question						20
skipped question						6

Conclusion: this is useful feedback which proves that people may place a higher value on training than they can personally afford to pay. This suggests some form of subsidy may be necessary to cover the true costs of putting on training to enable participation by those who most need it.

We would also like to know how we can best serve the needs of our sector in the future and would like to understand any hurdles or barriers that stifle stability or growth within social enterprises. Please tell us of any problems you anticipate and practical ways that we may be able to work with you to help.

Answer Options	Response Count
	8
answered question	8
skipped question	18
Number	Response Text
1	It is great to know that you are there and can advise before I commit to any new plans.
2	Co- operation between business
3	we require stand alongside support
4	None
5	lack of business confidence, difficulties generating income
6	Funding uncertainty

7	Inadequate funding, unbalanced growth
8	we need a fast responsive knowledgeable support service for social enterprises

We tried an approach with this question that clearly didn't produce the desired result!

At Audit Panel it was recognised that the question was long, complex, and asked two questions. The Panel felt that such issues could be more usefully explored using other techniques eg. a focus group.

Recommendation 5 – Resources notwithstanding, CEU should look to use a range of consultation techniques for its next social accounting cycle.

c) Developing products to work alongside the services offered

CEU has expanded its portfolio of training courses over the period to 13, some nationally accredited. Capacity to do even more during this period has been limited. It is an area of work we wish to consolidate in the future and maximise the benefits from our efforts.

CEU courses devised/delivered in 2007/08:

3 day Professional Development for Social Enterprise Advisors (RISE)	Industrial and Provident Societies and Share Issues
Introduction to Social Accounting and Audit	Income Generation Workshop
Legal Structures	Marketing for Credit Unions
So you want to start your own business	Financing your own business
Business Planning for 3 rd Sector enterprises	Achieving sustainable funding
Social Accounting and Auditing (OCN)	Managing your finances
Legal Structures for renewable energy businesses	

d) Providing business advice tailored to the needs of our clients

With the changes in contracting for business support as part of Gordon Brown's business simplification agenda it has been a challenging year for CEU in terms of being able to secure funding to subsidise the cost of business support services. We were fortunate to be able to deliver free support to a number of clients in Somerset and Devon through a fourth year Service Level Agreement with Somerset County Council and a one off contract with Wessex Reinvestment Society. In addition, Somerset County Council had some Rural Renaissance funding which meant we were able to do more work in Somerset than usual.

During the year we have met with some 55 separate clients (1 client, Nigel Topping was met in connection with 2 separate businesses - Totnes Pound & Sastrugi). This total includes 2 Active Community Fund clients.

Month	A	M	J	July	Aug	S	O	N	D	J	F	Mar	Totals
No. of client meetings/desk	6	6	7	11	10	5	11	8	5	8	9	7	93

work slots													
Days spent on Business Support	5	3.5	4	7	4.5	2.36	9.2	4.7	3.78	3.88	4.71	3.54	53.38 days
Average Time per client	0.83	0.58	0.57	0.64	0.45	0.47	0.84	0.59	0.76	0.49	0.52	0.51	0.60 day ave

The case studies below give a flavour of the work with clients.

Case Study 1, Business Support, 2007/8.

Client: The Atmospherics Trust, Unincorporated charity

The client has developed a unique idea, since 1988, using the combination of colour, imagery, sound, touch and smell within theatre therapy session to enhance the lives for people with severe learning disabilities. The technique has proved to be a highly successful and effective sensory approach; sensitive and non-invasive with significant positive impact on their clients. They have worked in partnership with the National Autistic Society and the Orchard Vale Trust.

Business support was provided through two face to face meetings plus follow up emails and telephone conversations. Although currently a small unincorporated charity, the potential for the organisation is tremendous. Through the advice sessions it was agreed that the client would become a charitable company limited by guarantee with a privately owned trading arm to run the training development side. Since these sessions, the client has taken on two trainees and received further endorsement from the National Autistic Society.

Client testimonial: *"We both wish to thank you for the time you spent with us on Monday and the invaluable help and advice you gave us"*

Case Study 2, Business Support 2007/8

BIRST = Brain Injury rehabilitation Services and Therapy

The client has set up a business to provide services to those suffering from acquired brain injury. From his own personal experience, he knows how the appropriate support can be life-changing and believes passionately in supporting others who have been similarly affected.

He currently operates as a sole trader but is looking to establish both social enterprise and private limited business. The business is based on the family farm and two log cabins are already completed and available for respite and short holidays; a further two are under construction. The client is already trading via holiday lets for the log cabins and providing rehabilitation support for a limited number of clients and had a successful grant application in November 2007 allowing him to develop the rehabilitation support services further.

Intensive business support has been provided throughout 07/08 on setting up the business, advice on different legal structures, guidance on business planning and finances and employment. He has recently taken on his first member of staff; has achieved a good level of bookings for 2008 for the cabins and has made incredible progress with one of his rehabilitation clients who has moved out from his parent's home and is now living independently with support.

We use a client satisfaction survey form (*Appendix VI*) to gather feedback and shape future services. In addition, for the social accounts, Clients completed an anonymous on-line questionnaire. (*see Appendix VIIa*)

How would you rate our services overall based on those you have used in terms of us meeting your objectives?

Answer Options	Response Percent	Response Count
Perfectly, couldn't have asked for a better fit	56.0%	14
Fairly well, I was satisfied with the outcome	44.0%	11
Not very well, I was disappointed with the outcome	0.0%	0
Hopeless - don't know what you thought we wanted but it wasn't that!	0.0%	0
Anything you'd like to add?		3
answered question		25
skipped question		1

The following comments were also fed back by our clients:

- *I would not say perfect, on that - but fairly sounds inadequate, so would want to substitute fairly for very well.*
- *Still in the process, so can't give a definitive response yet!*
- *Advice on the NI implications of incorporation*

Conclusion

This is very encouraging with 100% satisfied and, it could be construed, 56% delighted respondents.

We received a further explanation from the client who made the third comment to the effect that he would have liked this (NI) information, but to be fair, didn't ask for it at the time ~ perhaps (I) should have anticipated his needs. He has since received this advice and gone on to engage further services from us so we may conclude he is a happy customer.

Recommendation 6 – For our next social accounts we should consider, as a team, the questions we want to ask, in terms of wording and also to find out “what difference does CEU make” ie. impact.

In terms of delivering our work to meet your timetable how would you rate the work we have done with you?		
Answer Options	Response Percent	Response Count
Some of the work was timely but some was a bit overdue	0.0%	0
Great - it met our timetable perfectly	84.0%	21
Good - we had to wait a bit but not too long	12.0%	3
Okay - but it would have suited us to have it sooner	4.0%	1
Late - it was not delivered on time and we weren't chuffed	0.0%	0
Anything you'd like to add?		2
answered question		25
skipped question		1
Anything you'd like to add?		
Hopefully on-going		
Doesn't really apply as you have set the timetable for us - the trainees!		

How well was the service tailored to your specific needs?		
Answer Options	Response Percent	Response Count
First Class	44.0%	11
Very Good	52.0%	13
Acceptable	4.0%	1
Second Rate	0.0%	0
Anything you'd like to add?		1
<i>answered question</i>		25
<i>skipped question</i>		1

Conclusion

This is useful feedback for us showing that we are still, somehow, managing to keep the majority of our clients happy in terms of response times. Capacity is a real issue for us so we're frankly pleasantly surprised that we've done so well. That in no way diminishes the need to try and satisfy 100% of our clients in the future.

Case Study 3, Business Support 2007/8 'St Michael's Pre-School – Kingsteignton

This client approached CEU in 2006 as they wanted to look at limiting the liability of those involved in running the Pre-school which was currently un-incorporated. They had a strong core of very dedicated staff and had 24 children on their books at the time of calling us in. The environment was clearly one of very happy and well cared for children.

Business Advice was given in looking at suitable structures for them given their strategy to work very much as a collective. As a result, after a series of meetings, looking at how to legally wind up the existing unincorporated pre-school and set up the new company they became incorporated as one of the very first Community Interest Companies adopting the new Co-operatives UK Co-op Model in May 2007. This will enable the current staff to have control of the business whilst limiting their personal liability and still take key decisions collectively

A launch of the new St. Michael's Pre-School CIC was held in June 2008 and a member of CEU was asked to perform the Ribbon Cutting Ceremony on the day. This was followed up with a thank you card made by the children in the pre-school.

Case Study 4, Business Support 2007/8 Coffee on the Corner, Exminster, Devon

This client came to CEU in 2006 with a plan to provide a coffee shop which could act as a much needed hub for the community. We were able to help with designing an initial consultation questionnaire which went out to every household in December. 500 responses were received which showed overwhelming support for the proposal and provided ideas on what should be sold at what price and what other services the community would like to see within the coffee shop. CEU were able to point the client to another client in Somerset that they had assisted previously to assist with their research.

Advice was also provided on an application for funding which provided the final piece of the funding puzzle. Lastly advice was provided in what legal structure to adopt to ensure limited liability but a clear social enterprise structure. Coffee on the Corner is has subsequently registered as a Community Interest Company and has opened for business.

Client comment *“Great news, we got the full £7900 from Awards for All. I can't quite believe it as we only heard today and it hasn't sunk in but I wanted to write and thank you so much for your part in making it happen! So much thanks”.*

NB: staff on maternity have used the cafe and can confirm it's a great social enterprise in action, friendly helpful service, a buzzing atmosphere and baby friendly! ☺

e) Overhauling and maintaining an up-to-date website linking to relevant information sources by end July

We were successful in securing a small grant from the Co-op Development Fund towards the overhaul of our website to enable us to not only make it more in keeping with our current branding but to provide better links and a dedicated resources site for our trainees. The timetable for this slipped and the website has only just gone live at the time of writing, some 8 months later than planned. Nevertheless it is a real achievement and our new website is one that reflects our brand, details our services and is something that should serve our clients much better.

We have already received the following praise from an initial user:-

“Well I must say that the new site is a lot more interesting than the old one!”

He did also go on to point out. . .

“However on entering my (username) email and (password) I got this message ‘Sorry the information you entered (sic) did not match our records...’ ”

Both problems have since been rectified!

f) Offering facilitation, evaluation and strategic planning services

▪ **We have provided facilitation services for the following clients:-**

1. Tamar Area of Outstanding Natural Beauty
2. Somerset Community Food Projects Network

▪ **We have carried out the following evaluation & research work:**

1. The Bristol Change Up Consortium, in partnership with Vivid Regeneration in Bristol, which straddled last year and ended at the beginning of the reporting year.
2. Bideford Pannier Market - a research project to evaluation the potential for the Pannier market

▪ **Strategic Planning Sessions have been planned and delivered on behalf of:**

1. North Devon Community Projects – 1 day for all staff and board to help with future direction and action planning
2. Theatre 4 Business – ½ day to take stock and plan the most effective way forward

Both the Bristol Change Up Consortium and North Devon Community Projects received Service Evaluation Forms after the work was completed. Both felt we had “met the objectives of the work well”, lived up to our values of “Fostering positive partnerships – working mutually with honesty and integrity” and “Trying to always be approachable and accessible” well. They also rated our customer service as “excellent” and would both recommend us to others and use our services again.

g) Achieving and maintaining appropriate Quality Standards for the sector such as IiP, IBA

Investors In People

We have invested £661 in getting our ‘Investors In People’ status re-accredited this year.

We received our renewal of Investors in People status in April 2007 with many areas highlighted as strengths in our work and a few points made for further development. We were delighted with the report and felt it supported our ethos and endorsed our procedures. The following extracts are to give a flavour of the report, the full version of which is available if required.

‘It was really good to visit the organisation again after three years and to meet such a positive and enthusiastic team...’. ‘Much of the good practice demonstrated in 2004 has been maintained if not enhanced.some of the processes have gone through necessary evolution or reinstatement. However the permeating thread of the organisation’s people focused ethos is still firmly in place.’

Areas of development included

- a) valuing line management and peer management meetings within the overall organisation’s training plan
- b) quantifying the impact of the training investment on the company’s aims and objectives
- c) using this information to develop the organisation’s future vision, business plan and strategy.

Small Firms Enterprise Development Initiative (SFEDI)

This year Lorna Turner successfully achieved the SFEDI accreditation including attainment of the new Social Enterprise Standards. Debbie Stewart and Steve Angove’s assessment has also been paid for and the work is about to commence.

At £2,880 this equates to a total financial investment in achieving this objective of £3,541 by CEU although we are hoping to receive bursaries of up to 50% from RISE towards the SFEDI assessment costs. The amount of time invested by each of us to be assessed is a significant investment and cost to CEU well over and above the financial one.

SAN Auditor Status

Debbie has chaired 2 Social Audit Panels which is the requirement by SAN to retain approved Social Auditor status.

Conclusions

In our facilitation, evaluation and strategic planning service, we have worked with a mix of repeat and new clients. This is an area of work CEU could expand, particularly in the current market place and consideration should be given to how we can proactively promote this strand of work

Recommendation 7: That we give consideration to how we can proactively promote this strand of work.

CEU continues to invest in ensuring its staff meets quality standards appropriate to the sector though this requires a significant financial and time commitment. This is healthy for staff development but also places CEU in a eligible position to bid for specific contracts.

Aim 4

To be considered a great place to work by the staff team by:

All staff completed an on-line anonymous questionnaire. Please note the high number of “don’t know” responses are from a staff member who was on maternity leave for the social accounting period and therefore not physically around to have an “up to date” response to many of the questions.

The following questions all follow the same format and ask you to rate how strongly you agree or disagree with a series of statements concerning aspects of being an employee of ceu						
General:						
Answer Options	Always	Mostly	Sometimes	Never	Don't know	Response Count
I enjoy the work I do	2	4	0	0	1	7
My job is interesting	3	2	1	0	1	7
I have a clear sense of my responsibilities	2	3	1	0	1	7
My health and well-being at work is taken seriously	4	1	1	0	1	7
Please add any explanatory comments						4
						<i>answered question</i>
						<i>skipped question</i>
						7
						0

Number	Please add any explanatory comments
1	I think that overall CEU is a very good place to work and goes beyond most organizations in terms of ensuring its employees are well treated.
2	Although health and well-being is taken seriously, it is not always possible to act upon due to the pressures of a small orgn so I have put 'mostly'.
3	I've taken this to be the accounts for the financial year 07/08 and so i have answered the bits that are relevant bearing in mind i've been away from the office on maternity leave. So there are quite a few blanks!
4	Unfortunately we are a small and pressured team who are rapidly moving 'ships in the night' at times so with the best will in the world I don't think we can each be aware of the others' wellbeing as much as I might like

Whilst the scope of this year’s Social Accounts includes looking at only 2 Aims in detail we consulted staff as to whether they felt the current full set of Aims are still appropriate. See *Appendix VIIb* for staff questionnaire.

CEU's Aims to support achievement of the Mission are stated below. You are asked to rate the appropriateness of each aim as follows:

Answer Options	Still appropriate - keep as is	Appropriate but needs modification	Inappropriate - change completely	Response Count
To delivery high quality training, information and support services to social enterprises	7	0	0	7
To be recognised as a leader in the Quality and Impact field within the South West	5	2	0	7
To be a financially sustainable social enterprise	6	1	0	7
To be considered a great place to work by the staff team	7	0	0	7

- I am not a fan of having lots of aims so I would amend the first two to be:

1) To deliver high quality, affordable services to all our clients, both direct and indirect.

2) To be recognised as leaders and experts in social enterprise development within the South West and associated fields such as Quality and Impact

Obviously this needs discussion...

- 'financially successful' rather than just 'financially sustainable' which sounds like a limited aim. Financially successful social enterprises can choose what to do with their profits, should plan for continued success, and can work with integrity and honest. Also with such success goes the confidence and credibility to be a field leader.
- 'Quality and Impact' is a hard phrase to understand unless you are in the sector and even then there are so many other terms I'm not sure this is the right phrase. It is the only aim that has geographical boundaries stated within it. Perhaps that should be in the Mission.
- I guess it's timely to have a review of the skills and knowledge set CEU now has, as a lot has changed over the last 12-18 months, and see how well a fit there is, and also bear in mind the market place, and what motivates staff too (we have to enjoy it!). I don't think we can claim to be leaders of Q&I unless we can widen our skills set of Q&I tools and put resources into that. Maybe a modification and focus more on SA and the evaluation and monitoring work done on specific projects eg. Creating Excellence.
- I still feel these are relevant if becoming ever more of a challenge to achieve.

Recommendation 8: That as part of the review of Mission and Values, we also look at our Objectives, bearing in mind the challenging business environment CEU faces.

Staff were asked to give their opinions in regard to the following statements:

Support : Answer Options	Always	Mostly	Sometimes	Never	Don't know	Response Count
I feel part of a supportive team	3	2	1	0	1	7
My Line Manager or Peer Support provider gives me honest feedback on my performance	4	2	0	0	1	7
I get good support from the other team members	4	2	0	0	1	7
Please add any explanatory comments						4

	<i>answered question</i>	7
	<i>skipped question</i>	0

Please add any explanatory comments

It is a very supportive place to work

Capacity pressures means it not always possible for team members to give that support even when they would like to.

n/a as been on maternity leave

Because we deliver work with clients on our own and the person who provides my peer support is only working one day a week it is impossible for him to really know how well I am performing in anything other than a broad sense. Therefore to expect anyone else to be able to do more than listen to our account of how it is (when delivering) may be unrealistic.

Conditions: Answer Options	Strongly Agree	Agree	Not sure	Disagree	Strongly Disagree	Response Count
I am satisfied with the hours I work	2	2	0	2	0	6
I feel I am not under too much work pressure	3	1	0	2	0	6
I am satisfied with the pay I receive	1	4	1	0	0	6
I am satisfied with my other benefits such as holiday entitlement, etc.	1	5	0	0	0	6
I am satisfied with the CEU office environment	0	5	1	0	0	6
I am able to work at home when I need to	3	2	0	0	1	6
I am able to manage my own diary in terms of work commitments	3	2	1	0	0	6

Staff comments are as follows:-

- 1. More money and holidays and a swanky office would always be nice but can't complain!*
- 2. The comments raised on the first three are really a reflection of the current situation which is difficult at the moment. This might change within a month, or at any point so wouldn't always be my response!*
- 3. The staff team, and in particular Debbie and Lorna, have been great in terms of sorting out maternity leave and pay over the last year, when it has been quite a challenge for ceu.*
- 4. At the moment because we need to be generating as much income as possible I'm regularly doing silly hours, cancelling leave and TOIL that I'd hoped to take to help trade us out of this difficult period. That goes with the territory of being your own boss & having a huge sense of responsibility towards the others in the team. However, bringing others on board to share that responsibility will hopefully lessen the load. Our pension contributions and pay increases are also too low but reflect the financial reality that we currently face.*

In the past year I have received the following amount of training including attending conferences to enhance my knowledge:		
Answer Options	Response Percent	Response Count
0.5 days	28.6%	2
1 day	14.3%	1
2-5 days	57.1%	4
more than five days	0.0%	0

Please add any relevant comments you wish	5
answered question	7
Please add any relevant comments you wish	
I could have had more if I kept my diary up-to-date	
The organisation takes training seriously.	
It would be more than 5 if you include SFEDI as there was useful feedback as part of this.	
n/a as been on maternity leave	
I really enjoyed the Co-operative Development Body conference in Swindon, in no small part because it gave me time out with Steve and Lorna to reflect and plan	

Training :						
Answer Options	Strongly agree	Agree	Not Sure	Disagree	Strongly disagree	Response Count
Since joining CEU I have received the training I need to do my job effectively	3	4	0	0	0	7
The training I have received has been worthwhile	4	3	0	0	0	7
The Staff Appraisal / Peer Support system is good	4	1	2	0	0	7

The following are comments from the staff:

1. I have received useful training both to increase my skills and knowledge but also to recharge and stimulate me with opportunities to take a broader view of the sector. I'm not sure of the peer support system as I've been on maternity leave for the last year.

2. I suggested that I changed Peer Support providers as there was a danger of Lorna and I having mutual consolation sessions. However, when Noel only works one day a week it is easy to feel that perhaps my time with him is not as important as the strategic work he needs to do. However, I always find him a good listener and very supportive and able to see the wood for the trees.

Communications:	Always	Mostly	Some times	Never	Don't know
Answer Options					
Communications within the organisation are good	1	4	1	0	1
I feel I understand well the work of the other people in our team	1	4	2	0	0
My ideas and suggestions are taken seriously	6	0	0	0	1
I am satisfied with my involvement in decisions which affect my work	6	0	0	0	1
I feel able to influence the decision-making of the organisation	5	0	2	0	0
I am proud to work for CEU	6	1	0	0	0
I speak highly of CEU to my friends	5	2	0	0	0

Morale amongst the team is generally high	1	5	0	0	1
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As an overall Aim we have strived, despite huge staff changes and mounting pressures, to keep sight of our goal through a number of measures such as;

- holding team lunches to welcome new staff, say goodbye to those who are leaving and included a really nice one at Christmas
- providing regular line management and peer support sessions
- remembering each other's birthdays
- celebrating births
- trying to be flexible in meeting the needs of the individual team members through home working arrangements including changes to plans, sometimes at very short notice.
- trying to invest in improved equipment and technology to enable staff to have the best tools for the job.

The following feedback from a staff member is most encouraging:-

"I think that overall CEU is a very good place to work and goes beyond most organizations in terms of ensuring its employees are well treated."

However we can't get complacent as another member points out...

"Unfortunately we are a small and pressured team who are rapidly moving 'ships in the night' at times so with the best will in the world I don't think we can each be aware of the others' wellbeing as much as I might like".

a) Constantly striving to improve quality of our policies, procedures, systems and environment allowing staff to perform their jobs to the best of their ability

The areas we have looked at during the period include:-

- Reviewing our meetings to try and avoid duplication between board and team meeting agendas
- Revising how time sheets allow us to record time against specific client activity (which should also assist in future social book-keeping)
- Purchasing a new laptop to replace one that was below the ideal specification for the job
- Investing in better spam and virus protection software saving staff time in having to trawl through the junk
- Investing in timer switches for the antiquated heating system to enable the office to be warmer on arrival in winter

b) Supporting staff through time and resource within the means of the company for personal and professional development

Our investment in staff training and development totals £3,653.75 which includes the investment in SFEDI assessment. Staff training has included Renate attending a First Aid Training course and Lorna and Debbie attending a day on Quality and Impact training in Perform, a Business Excellence based model developed by the C3 partnership in Bristol. See *Appendix VIII* for a *summary of staff training* undertaken in the social accounting period.

- c) **Striving to ensure the co-op's members maintain a healthy work : life balance**
- d) **Taking the time to talk through issues with respect and consideration and finding (and acting) on solutions**
- e) **Maintaining awareness that productivity is a combination of skills, physical and emotional well-being and that all three areas should be considered**

Whilst these are Objectives that we all wish to achieve, at the end of the day in a small business facing many challenges it can often rely on the individual to assert their own boundaries in order to achieve a sense of work:life balance and it is fair to say that some of us are not very good at this. Hours regularly vastly exceed those we are contracted to do. The reasons for this vary from one part-time member of staff choosing to work much longer hours because of what appears to be love of the job and environment to other full-time members feeling they must in order to achieve what is needed financially for the business. The result of this is that the generous leave entitlement is not taken up by some members of staff who simply can't afford to be off at critical times in the development of the projects they are supporting.

Our Line & Peer Management meetings should provide one forum for this to happen when all else fails due to pressures of time! We have also invested time to find a workable solution for a key member of staff to be able to come back to work after maternity leave in a way that meets her change of circumstances.

Conclusion

These three objectives have been listed together for the purposes of this commentary as the key issues which have been recognised by the team are pertinent to all three.

Capacity has been an issue within the organisation; it is unsurprising as we are a small team and having a team member off on maternity leave meant that this issue became even more difficult to manage.

Having said that a number of positive steps were taken during the year:-

- Using a zero hours contract which reduced the potential risks but could increase capacity as and when work was available
- Team discussion on our strategy day about the issue and possible solutions
- Timesheets which allow us to analyse our time spent on income-generating work versus non-income generating work as well as looking at TOIL levels by each person

Since the end of February 08, Steve has increased his time for CEU and is now a director.

In addition to the lack of capacity increasing the stress involved in the work, external market factors resulting in a very uncertain future have been of particular concern. Although many of these are outside our control, we have invested time and resource, over and above normal levels, into ensuring that we are

involved where possible in decision-making, that we are linked into appropriate networks and we have actively sought new income streams through additional tenders and bid-writing.

Recommendation 9 - CEU should review these Objectives and consider how we can evaluate our performance against them in future.

f) Evaluating the company's performance against this Aim through reviews and Social Accounting and Audit.

We have chosen this Aim this year as one of the two to be included in the scope of our social accounting exercise!

Environmental impact

CEU does have an environmental policy which is overdue to be reviewed as part of a team meeting (Recommendation 10).

CEU has done the following during the reporting year:-

1. Paid £54.87 to have waste paper collected for recycling once it has been used on both sides and also confidential, shredded paper.
2. Purchased out of print stamps – which are also often more interesting than the current ones!
3. Purchased Fair Trade refreshments wherever possible and environmentally friendly products (although we hadn't explained this to a new member of staff so are still using up some erroneously purchased stock!)
4. Use paper sourced in the most environmentally friendly way for printing our marketing materials.
5. Engaged with local suppliers wherever possible to cut down distribution miles.
6. Encouraged the use of public transport and car sharing where possible – it must be pointed out that some make a bit more effort here than others.
7. Re-used envelopes (although we have received one complaint about this!)

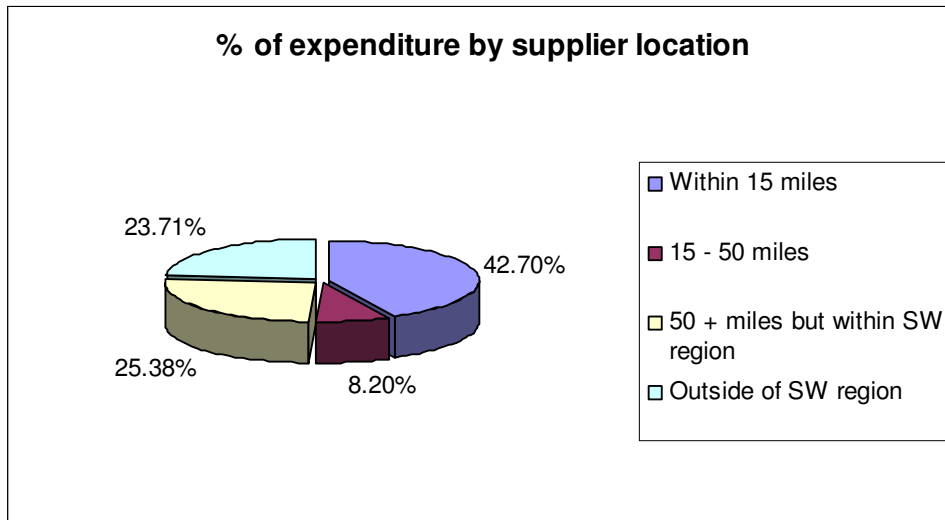
We also bank with Unity (formerly a subsidiary of the Co-op) and have opened up new accounts with The Co-operative Bank to support our ethical policies whilst getting a better rate of interest.

On the other side of the coin we have had to stop getting our printer cartridges refilled as we found they were considerably inferior and some of the team may rebelled against, another staff member's (by her own admission) over-zealous recycling efforts, (probably at the point where there was no room for the workers!?).

We have already looked at what our staff team feel about our value of 'treading lightly on the earth' (see page 17) and it is the Author's opinion that we review all of our environmental practices as part of **Recommendation 10 above and Recommendation 11 that consideration is given to looking at the Carbon Trust website which could enable CEU to calculate its carbon footprint.**

Economic impacts

An analysis of our expenditure shows that of our 36 suppliers (excluding staff) **50% of our supplies are purchased from suppliers within a 50 mile radius and 42.7% comes from within 15 miles.**



Added to which all of our staff live within a 30 mile radius of the office base so our salary expenditure is going into very 'local pockets'.

We have a policy of trying to use social enterprise venues for our training and events and have hired St. Sidwell's, The Albermarle Centre & Exeter CVS, amongst others, when we have been choosing training venues for our own training and have continued to use COSMIC at Ottery St Mary for website hosting, development and training.

Conclusion: we have made some positive steps to ensure our economic impact reflects our values but there is more that we can do.

Recommendation 12 – that we look for best practice and benchmarks elsewhere to inform our future economic policy and practice.

Compliance

CEU complies with the following:-

- Company law through the filing of annual returns and accounts, displaying necessary information at its registered office and on its stationery and not trading insolvently as a minimum.
- IIP – in order to achieve the recent re-accreditation we have implemented many systems and some more good practice
- Equal opportunities – through an open recruitment process, equal access to training and development and flexible working practices to name but a few. We also seek to accommodate clients with special needs where possible / within our means.

In addition we are a co-operative which requires that we subscribe to the following principles:-

1. Voluntary and Open Membership

As a worker co-operative any employee is entitled to become a member after a serving a satisfactory 6 month probationary period.

2. Democratic Member Control

As can be seen we have welcomed 2 new directors to the board in the period. Any staff member, as a worker co-operative, is entitled to a seat on the board after satisfying a suitable probationary period.

3. Member Economic Participation

We are structured as a Common Ownership Co-operative rather than the usual privately owned structure therefore there are no shares and hence no dividends. However, when we are in the fortunate position of being able to award some bonuses this will be considered in a democratic way by the team.

4. Autonomy and Independence

We remain autonomous and independent from any other person or body, yet still manage to work in some creative partnerships when mutually beneficial.

5. Education, Training and Information

We have demonstrated through our investment in our staff how we strive to achieve this. In addition there has been considerable in-house mentoring and development that has gone on during the year.

6. Co-operation Among Co-operatives

We continued to work with Co-ops UK and 3 of us attended a weekend conference for Co-operative Development Bodies, many of whom are themselves structured co-operatively. We shop at our local Co-op for many of our supplies and use Paperchain for some of our paper recycling.

7. Concern for Community

Each year, as a small step, we have given to donating to a charity rather than buying and posting out Christmas cards. This year we donated £30 to Children's Hospice South West. We have also already touched on how we try to support the local community through our purchasing decisions. Finally, there are many clients who are doing good things within the social economy who cannot afford to pay the going rate for our services. We have been very creative in finding ways to work with and support them through subsidy from other places.

Main issues and achievements, conclusions and recommendations

As always, pulling together the social accounts has taken a lot longer than the time originally set aside for the task. That said, despite the seemingly disproportionate effort, it has been a worthwhile exercise.

Achievements

It still feels as if CEU punches above its weight in terms of the achievements which appear to be impressive in terms of numbers of new training courses written and delivered to acclaim, number of trainees trained and clients delivered to – the vast majority of whom seem either very or fairly pleased with the quality of service received.

We have also more than doubled in terms of numbers of staff and seen fundamental changes to the make up of the board. Whilst all of this has been going on we have developed our best ever marketing materials including a superb new website and worked hard to achieve and maintain appropriate quality standards in connection with the work that we do.

All staff are proud to work for CEU, our clients believe we provide a good quality service and the three clients we remembered to ask would recommend us to others and use our services again. Indeed one has already re-booked us!

Issues

The key issues to have arisen are ones due to a lack of time and capacity within the team, this being exacerbated at certain 'tipping points'. However each small step into growth has thrown up challenges along the way in terms of generating sufficient income to cover increased costs whilst investing sufficient time to welcome and induct new staff members.

This seems have impacted on our service delivery to clients at times – hence the problems with joining instructions and getting answers to phone calls. It is also reflected in some of the less certain comments from one or two of the team members in terms of their feelings with regard to being part of a supportive team, about communications and their lack of understanding about the role of other team members.

Conclusion

It has been a good year despite us all wondering how we would fare given the absence of Helen for a year – who has been missed greatly. We have achieved things that are cause for celebration. However, there is no room for complacency and with the introduction of some more streamlined systems, investment in some improved technology when the budget permits, we can and should do better in the future.

Recommendations

No.1 - As a staff team, CEU will review the Values and Mission in 2008/9, reflecting the views above. Consideration will be given to identifying internal/external values and tailoring future consultation on the Values to internal/external stakeholders.

No. 2 - We will look at standardising our training feedback forms so that they can be entered on a database so that reporting can be far more sophisticated including % responses..

No. 3 - We think we need to ensure that if our direct client is choosing & booking the venue and dealing with joining instructions we need to liaise with them to ensure the i's have been dotted.

No. 4 - We think it would be useful for the trainers to meet as a team to review the feedback quarterly (in addition to the trainers looking at them immediately) and decide what actions if any should be implemented.

No. 5 – Resources notwithstanding, CEU should look to use a range of consultation techniques for its next social accounting cycle.

No. 6 – For our next social accounts we should consider, as a team, the questions we want to ask, in terms of wording and also to find out “what difference does CEU make” i.e. impact.

No. 7 - We give consideration to how we can proactively promote this strand of work (evaluation, facilitation and strategic planning services).

No 8 - As part of the review of Mission and Values, we also look at our Objectives, bearing in mind the challenging business environment CEU faces.

No. 9 - We somehow look at this objective (4e) and consider how we can evaluate our performance against it in future.

No. 10 - CEU does have an environmental policy which is overdue to be reviewed as part of a team meeting

No. 11 – Consideration be given to looking at the Carbon Trust website which enables an organisation to calculate its carbon footprint

No.12 – We look for best practice and benchmarks elsewhere to inform our future economic policy and practice.

Strengths and weaknesses of the Social Accounting Process

The strengths in this year's social accounting process have been:-

1. that we agreed early on what the focus would be and stuck to it
2. that we produced the flipchart sheet, book-keeping system that made it far easier to capture the relevant data as we went along
3. that we managed to gather so much feedback from a large number of trainees
4. that someone who thought they knew an awful lot about social accounting got to experience first hand the pressures of pulling the questionnaires together and the accounts at the end of the process. This has been invaluable in terms of having a first hand understanding of all aspects of the process and a greater empathy for trainees and those for who I'm panel chairing.
5. Using Survey Monkey – so much easier to send out, gather and analyse data – the respondents also gave it their vote!

The weaknesses are:-

1. Not having shaped the consultation as a team – we may not have asked some of the questions which with hindsight might have been more useful (for example, asking staff directly how they felt we were doing against the relevant objectives)
2. Using only online consultation – more depth might have been achieved had we been able to organise some client interviews, however, I'm not sure it would have been realistic in terms of our resources and their time.
3. Having limited response rates from clients – for future social accounts we will look to increase response rates.
4. Time pressures to prepare the accounts along with the usual pressured workload!
5. Not having remembered, as it's been a few years, to go back to the recommendations from the previous panel and build that into the whole process.

Future plans for the next Social Accounting Cycle

We have yet to meet as a team and discuss the results of this one and plan ahead but will do so shortly after the panel.

Dialogue and disclosure

We will produce a summary of the accounts which will be available as a freely downloadable PDF on our website. The summary version will be emailed to all of the key stakeholders identified at Appendix III. We will produce a small number of summary copies in print but the size and quantity have yet to be decided.

We will add a section to our website informing our stakeholders as to the findings and resultant plans once the panel process has been completed and we have met as a team to agree and prioritise the actions.

Appendix III.

Stakeholders Consulted / Omitted

No	Name	Organisation	Client/trainee
1	Anderson Jones	St Sidwells Café, Exeter	C1
2	Alan Kay	CBSN	C2
3	Andrew Lightfoot	Devon County Council	C3
4	Charles Couzens	Wessex Reinvestment Trust	C4
5	Corinne Matthews	Somerset County Council	C5
6	Greg Mudge	Wessex Reinvestment Trust	C6
7	Hannah Reynolds	Exeter Community Centre	C7
8	Ian Bright	Totnes Renewable Energy Company	C8
9	Jane Sweetman	Somerset Community Food Project Network	C9
10	John Pearce	Social Audit Network	C10
11	Julia Swan	Stawley Community Association	C11
12	Karen Bridgford	Devon County Council	C3
13	Lesley Hughes	Ivybridge Town Council	C12
14	Mike Atkinson	Somerset County Council	C5
15	Naresh G. Giangrande	Transition Town Totnes	C13
16	Nigel Stone	Exmoor National Park (Dunster)	C14
17	Paul Baker	DARE / RE4D	C15
18	Tim Selman	Tamar AONB	C16
19	Nigel Topping	Totnes Pound & Sastrugi	C17 & 18
20	Joanne Parr	Glastonbury Comfort Food	C19
21	Sarah Clay	Glastonbury Development Trust	C20
22	Andrew Wall	BIRST (Headway)	C21
23	David Smith	Somerset Rural Community Council	C22
24	Tom Winsborough	West Somerset CVS	C23
25	Veronica Janas	Stawley	C11
26	Andy Merryfield	Somerset Racial Equality Council/BDA	C24
27	Kirsten Rishby	CHYPPS	C25
28	Naomi Griffith	Minehead Eye	C26
29	Barbara Ford	WHERE	C27
30	Paul and Sheena	Atmospherics	C28
31	Rachel Leach	Mongoose Moon	C29
32	Polly Adams	THIS	C30
33	Stuart Martin	THIS	C30
34	Angela Casey	Blue Wren	C31
35	Rick Caldicott	Langport Development Trust	C32
36	Sue Errington	Devon Development Education	C33
37	Bill Allen	Community Projects North Devon	C34
38	John Fisher	Bideford Pannier Market	C35
39	Jenny Salmon	Paperchain	C36
40	Barbara Middleton	Atwest	C37
41	Phil Shephard	Somerset Film and Video	C38
42	Andy Bradford	Brimpts Farm	C39
43	Brian Jeanes	North Curry Community Café	C40
44	Caty Collings	Tredegar Development Trust - Catapult	C41
45	Andrew Moore	Somerset Food Links	C42
46	Bob Andrews	Moorvale Credit Union	T1

47	Connie Homes	Sedgmoor Credit Union	T2
48	Alf Hill	Camelot Credit Union	T3
49	Phil Foggitt	Otter Rotters	C43
50	Paula Howley	RISE	C44
	Omitted Stakeholders		
51	Emma Parkin	Emma's Bread	C45
52	Heather Stallard	Blackdown Business Association	C46
53	Denise Hodgson	No Limits	C47
54	Mike Tyson	South West Allotments	C48
55	Sue Barnett	West Mendip CU	T4
56	Julie Dore	Kingsteignton Pre-School	C49
57	Dr Das	Being Human	C50
58	Josie Sutcliffe	Theatre 4 Business	C51
59	Joddy Chapman	South Brent Renewable Energy Co	C52
60	Mark Burton	UK Jak Bank Research	C53
61	Charles Couzens	Ecos Homes	C54
62	Cornwall ACF	<i>Greenbank Christian Centre but Cornwall ACF is the paying client</i>	C55

Bounced back:
Naomi Griffith
Bridgwater Credit Union

NB. Omitted clients include those we genuinely omitted (previously referred to) plus those clients CEU engaged with after the consultation was undertaken. These will be “accrued” for the next social accounting period.

Client Service Evaluation Form

We have recently carried out some work for you and in our quest to improve our services, we would value your honest and frank feedback.

1. Which of our following services did you use?

- Business Planning ()
- Training and Facilitation ()
- Quality and Impact ()
- Research and evaluation ()
- Financial Support Services ()
- Marketing Services ()

2. How well did we meet the objectives set?

Superbly () Well () Average () Not so well () Badly () No idea ()

3. Our values underpin our work. How well did we live up to these values:

a. Fostering positive partnerships – working mutually with honesty and integrity

Superbly () Well () Average () Not so well () Badly () No idea ()

b. Trying to always be approachable and accessible

Superbly () Well () Average () Not so well () Badly () No idea ()

4. How would you rate our customer service? Excellent (1) and Poor (5)

Excellent () OK () Poor ()
1 () 2 () 3 () 4 () 5 ()

5. Did you have the right amount of communication at each stage of the project? Please rate. Excellent (1) and Poor (5).

Excellent () OK () Poor ()
1 () 2 () 3 () 4 () 5 ()

6. Would you recommend us to others?

Yes () No () May be () Not appropriate ()

7. Would you use our services again?

Yes () No () May be () Not appropriate ()

8. Are there any other comments you would like to make?