



UpBEAT Social Enterprises cic Homes and Gardens Social Accounts 1st April 2007 – 31st March 2008 Summary Version

This document summarises the Social Accounts of the Homes and Gardens Service of UpBEAT Social Enterprises cic. The accounts are a way of monitoring our performance in seeking to achieve the social aims which we have set. A full copy is available from UpBEAT.

History and Background

UpBEAT Social Enterprises CIC was established in 2006 as the trading arm of Bramley Elderly Action, a charity which works with older people in the Leeds 13 area. The aims included providing a range of reliable, trustworthy practical services for older people including a business selling gadgets and aids to independent living and a Homes and Gardens service providing gardening, decorating and home repairs. UpBEAT also wanted to support other organisations providing similar services or undertaking similar projects through its consultancy service and, ultimately to re-invest profits into Bramley Elderly Action.

As a Community Interest Company, UpBEAT has to register its social aims with the Regulator of CICs, and they are monitored annually. The social accounts are a means of reporting to the Regulator on how far we have achieved our social aims as well as enabling UpBEAT to monitor performance and inform planning and development.

UpBEAT's turnover across the whole business during 2007/2008 was £101,707. This includes some grant income from Leeds City Council's Keeping House board. The Homes and Gardens area of operation had approximately 200 customers during the year, 90 of whom received a regular gardening service. 5 people have been employed by the Homes and Gardens Service during 2007/08.

The social accounts were compiled by Jayne Learoyd, a former employee of UpBEAT and of Bramley Elderly Action and Laura Taggart, (former) Company Secretary of UpBEAT. They cover the period April 2007 - March 2008 and have been funded through the Big Lottery Awards for All programme.

**UpBEAT Social Enterprises cic
230A Stanningley Road, Bramley, Leeds, LS13 3BA**



LOTTERY FUNDED

Mission, Values, Objectives and Activities

UpBEAT's mission is: To provide a range of services which enable older people in Leeds to live independent lives'

UpBEAT's Values: 'In all that we do, we endeavour to act with vision, respect, integrity and vitality'

Vision: forward thinking, innovative, seeing potential in people

Respect: (for) equality, ethnicity, age, gender, individualism (treating everyone as an individual)

Integrity: Honesty, trustworthy, (promoting) confidence in Bramley Elderly Action/UpBEAT

Vitality: Passion, creativity, energy, enthusiasm, celebration, encouraging older people's vitality, motivation.

Objectives:

Objective 1: to provide good value, practical services to people living in West Leeds

By:

Ensuring that staff are experienced and trained in relevant practical skills

Advertising the Homes and Gardens Service across West Leeds

Establishing networks and partnerships to promote the service as widely as possible

Being aware of relevant industry standards and good practice and seeking to incorporate these into UpBEAT's working practices and customer relations

Objective 2: To provide the benefits to older people, of knowing that the service is reliable, trustworthy and value for money

By

Ensuring that good practice developed by Bramley Elderly Action in relation to working with older people informs practice and conduct within UpBEAT

Ensuring that all queries are dealt with promptly and work carried out within a reasonable period of time

Endeavouring to deal with all complaints in a timely and professional manner and to ensure that service development is informed by any issues which arise through this

Involving older people in running the business and planning services

Objective 3: To use any profits which do not need to be re-invested to enable Bramley Elderly Action to subsidise the service to local older people

By:

Promoting the service to businesses and customers who will pay a commercial rate/market price for the service

Maintaining a balance of customers who pay a commercial rate/market price for the service and those who receive a subsidised service

Objective 4: To provide access to Bramley Elderly Action's Home Support Advice Service for anyone using UpBEAt services who is over 60 and living in the Bramley area

By:

Ensuring that UpBEAt staff are aware of the potential support needs of older people and disabled people

Maintaining good working relationships between UpBEAt and Bramley Elderly Action staff

Ensuring that older people who contact UpBEAt Homes and Gardens are offered the opportunity to be referred to Bramley Elderly Action, or to the relevant organisation if they live outside the Bramley area.

Objective 5: To create employment, support and training opportunities for people, and where possible, target these opportunities for local people

By:

Advertising vacancies locally

Creating volunteering opportunities

Accessing appropriate training and support for staff

Working with local training providers to provide opportunities for trainees

Scope and Methodology of the Social Accounts

These accounts focus on the Homes and Gardens area of operation and use a range of methods, both quantitative and qualitative. Key stakeholders were consulted with across the range of methods, including questionnaires, focus groups and individual interviews. These stakeholders were:

- People who had made enquiries/received quotes
- Customers, past and present
- BEA Management Committee, staff and members

- UpBEAt Board and staff
- Elite* Board and staff

* See note on 'Innovative Partnerships' p5

There was a good response rate overall to questionnaires. Out of 269 questionnaires sent out, 101 were returned (38%)

The Report on Performance: Analysis of the Social Accounts

Values

The accounts reflect a range of ways in which UpBEAt has lived up to its values of Vision, Respect, Integrity and Vitality. On the whole, customers awarded high scores for how well they felt these values have been achieved, and for wider measures of these, such as showing understanding of what customers want, being polite and courteous, giving clear information, carrying out work in a tidy manner etc.

In response to recommendations in last year's report, more work has been done to measure equality impact issues and the responses indicate that UpBEAt Homes and Gardens has worked with a representative group of older people in terms of gender, disability and ethnicity. The majority of customers were women, aged over 80, who feel themselves to have a disability. It may be that there is scope to offer specialist services to some groups of older people (men, BME elders) in future.

Examples of work which respects the needs of older people with disabilities included:

- carrying out work which addresses the needs of older people or people with disabilities: for example -
 - low maintenance gardens
 - safe surfaces to walk on
 - reduced vulnerability to bogus callers or deception burglars
 - spending time dealing with enquiries and clarifying information
 - providing information on products and helping to make purchases
- working with customers on work plans and designs
- offering free, non-binding quotations for work
- producing accessible information

There were also a significant minority of low responses to the questions on values and the Board members were also more reserved in their scoring, although it is difficult to know exactly what this is due to. In future, questionnaires could ask respondents to comment on the scores that they have given.

There has not been scope this year to pursue or promote some of the innovative ideas such as the gift voucher scheme or the gardening club. It would be worthwhile re-visiting UpBEAt's values with stakeholders to develop new ideas about how they feel values should be lived up to and measured.

Innovative Partnerships

A significant aspect of UpBEAT's development as a social enterprise has been its innovative relationships with local business people, in particular with the Elite Group, one of the largest employers in West Leeds, specialising in logistics.

“What we see here is an amazing enterprise between the two partners. Elite keep the thing going when there's difficulties. For example, when the gardeners can't go out because there's bad weather, Elite employ them (in the warehouse), keeping them sustainable”

Dr Chris Lowe, Keeping House DVD

The benefits of this relationship for UpBEAT include:

- Access to business skills and experience
- Saving time and money and increased efficiency through being able to use resources such as IT, accountancy and payroll, storage, shared recycling facilities, training, meeting space and the employment of UpBEAT staff in the warehouse during bad weather:

The benefits for Elite are perhaps less tangible but have been summarised as:

“Putting something back into the community. We need the support of the local area for developing large warehouses, such as getting planning permission in the first place. It's just a way of thanking them”

Andrew Joyce, former director of UpBEAT and Financial Manager of Elite: Keeping House DVD

Analysis of Individual Objectives and Associated Activity

Objective 1: to provide good value, practical services to people living in West Leeds

UpBEAT has worked towards providing good value practical services through accessing a range of training and career development opportunities for staff over the year, including NVQs and opportunities to train through Elite. The report shows that UpBEAT would benefit from a more systematic approach to the planning and recording of this, but that staff on the whole are satisfied with the level of training.

The majority of work has been locally based with the majority of referrals from Bramley Elderly Action membership. Experience has shown that there are resource implications to providing the service more widely and it may be that concentrating on building local networks and contacts is a practical solution to this.

Objective 2: To provide the benefits to older people, of knowing that the service is reliable, trustworthy and value for money

The accounts looked at a range of measures for assessing reliability, trustworthiness and value for money. Approximately 60% of customers gave maximum scores for

how satisfied they were that enquiries were dealt with promptly. 55% were satisfied that work was carried out within a reasonable period of time.

The report looked at complaints and issues with existing and past customers and found that most related to the cost of the service and value for money in relation to this. people Another common issue was the need for improved communications.

The report makes the recommendation that UpBEAt should use customer feedback forms on a routine basis so that concerns and issues can be quickly fed back and dealt with and so that customers are encouraged to pass on comments and compliments as well as complaints.

79% of customers said that they would use UpBEAt Homes and Gardens again.

Although there has been limited opportunity to involve more older people in the running of the business this year, the good response to questionnaires and to focus groups has shown that there is potential in this activity.

Objective 3: To use any profits which do not need to be re-invested to enable Bramley Elderly Action to subsidise the service to local older people

UpBEAt has made some progress towards making profit through developing a customer base of people/businesses paying a higher rate. 19% of customers were not BEA members and UpBEAt gained 3 commercial contracts. At the same time, UpBEAt has learned that there are resource implications to working on a commercial scale and to working across a wider geographical area, which has implications for future development.

Objective 4: To provide access to Bramley Elderly Action’s Home Support Advice Service for anyone who is over 60 and living in the Bramley area

The relationship with Bramley Elderly Action is a key element of the Homes and Gardens service. It ensures that there is insight into the needs and opinions of older people and adds value through access to support and information for older people themselves. UpBEAt workers benefit from close working relationships with Bramley Elderly Action staff and BEA staff have been closely involved in the planning and development of UpBEAt. These benefits could be increased through sharing training across the two organisations in areas such as aspects of ageing, social care and the vision and values of the both BEA and UpBEAt.

There have been examples of older people who have accessed the gardening service benefitting from becoming members of Bramley Elderly Action, and of UpBEAt staff referring concerns to BEA. There could be opportunities to improve practice and provide valuable monitoring information for both organisations through more systematic cross-referral procedures and monitoring of these kind of outcomes

Objective 5: To create employment, support and training opportunities for people, and where possible, target these opportunities for local people

UpBEAt has shown commitment to providing local employment through advertising vacancies locally. Two of the five staff employed during this year are local residents. UpBEAt has also worked with local training providers, including Elite's own training facilities and staff have gained a range of skills over the year. This has included 3 workers undertaking an NVQ in Horticulture. The creation of volunteering opportunities is an area for further development in future

Other views of Stakeholders

On the whole, comments from **UpBEAt staff** regarding job satisfaction and overall wellbeing were positive. Communication was seen as an area for improvement. Given the wide range of **Elite staff** who have contact with UpBEAt, in a variety of ways, there was a good general level of awareness of UpBEAt, with some areas for improvement. The accounting process was used as an opportunity to explore the roles and opinions of **UpBEAt's Board** in greater depth and this has been a valuable experience. The board identified the need to increase its membership and skills, devolve responsibility to sub-groups and take a more strategic role.

Environmental Impact

In addition to its environmental policy and measures to reduce fuel consumption and dispose of green waste responsibly, providing a service which enables older people to keep their gardens tidy has a number of wider environmental impacts:

- Improving the appearance of the area in general, increasing local pride
- Reducing the number of void properties on estates by enabling older people to stay in their homes for longer. This reduces vandalism and maintains the viability of neighbourhoods.

At the same time, older people on limited incomes, especially those with larger gardens may find it difficult to meet the cost of paying for the service. There is a challenge for UpBEAt, to be able to provide the service at a rate which is both affordable for the customer, cost-effective for UpBEAt, and reflects BEA's its role in supporting and campaigning for older people's interests.

Economic Impacts

Providing a value for money service for people has a positive economic impact on older people, who are often taken advantage of by less scrupulous trades people. This can have wider economic impacts on them, including:

- Paying more than they should for work because they are unaware of what the current fair price for a job should be.

- Not getting work done, or paying twice, because they are persuaded to pay in advance by workers who leave without completing the
- Longer-term financial abuse from bogus trades people who develop a relationship with the older person and offer to carry out other work at inflated prices.

“I was ripped off by so-called other gardeners. But not by UpBEAT’s gardeners”

“When you need a gardener, you don’t expect a cowboy and I am very pleased that I got a very Experienced, nice man”

UpBEAT Homes and Gardeners Customers

In addition, there are wider economic impacts:

- Enabling older people to stay in their homes for longer, maintaining tenancies and promoting stability in communities.
- Employment of people who were previously unemployed reduces demand on the benefits system and increases spending in the local economy.
- Referring older people on to Bramley Elderly Action, enables them to benefit from the work which BEA does to prevent social isolation, maintain independence in the community and reduce the costs to health and adult (social) services.
- Providing a service to customers who need extra support to access practical services contributes to keeping them safe and independent in their homes for longer and supports carers.

Main issues, achievements, conclusions & recommendations

The report on the whole shows that overall, UpBEAT is achieving its social aims. There is generally a good level of satisfaction with service and areas for improvement are mainly around communications and operational issues. Comments from people who received the services were generally positive and will hopefully be of encouragement to staff and Board members who have invested a great deal of time and effort into the business this year.

The social accounting process has highlighted a number of areas where there could be improved benefits to the organisation and to stakeholders, or where there could be improved monitoring of the benefits which already exist. This is understandable, given the challenges of a new business but hopefully the positive outcomes of the recommendations below will outweigh the time invested in addressing them. Most of the recommendations are to formalise and establish systems for good practice which is already taking place. Some of these recommendations represent possible development opportunities for which there may be grant funding available.