



**Social Accounts
UpBEAT Social Enterprises cic
Homes and Gardens**



1st April 2007 – 31st March 2008

**230 Stanningley Road
Bramley
Leeds
LS13 3BA**



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1. Introduction

UpBEAT Social Enterprises is a Community Interest Company; a 'limited liability company with the specific aim of providing benefit to a community.'¹ The company's governing document sets out a number of social aims which state how UpBEAT will benefit the community and the people it comes into contact with. These social accounts are a way of monitoring our performance in seeking to achieve the social aims.

During this accounting period (April 2007 – March 2008), UpBEAT has had three areas of operation: a Home and Gardens Service, a mentoring and consultancy service and a business selling gadgets and aids for independent living. Social accounts were prepared for the gadgets and aids operation last year.

This set of accounts builds on the experience gained in preparing those social accounts and the recommendations which were made for UpBEAT overall, whilst focusing on the Homes and Gardens service. This service included regular gardening, one-off gardening jobs, fencing and landscaping, painting and decorating and odd jobs.

2. 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 areas of operation, and the decision to set up a social enterprise were agreed upon as a means of furthering the work of Bramley Elderly Action in a number of ways:

- providing a range of reliable, trustworthy practical services for older people
- re-investing profits from UpBEAT into Bramley Elderly Action
- involving local people in the running of UpBEAT
- supporting other organisations providing similar services or undertaking similar projects

As part of the regulations of Community Interest Companies, Bramley Elderly Action is named as the 'asset locked body' of the company. BEA is therefore the main beneficiary of any profits and any decisions taken by the Directors. UpBEAT has to register its social aims with the Regulator of CICs, and they are monitored annually. These social accounts will be used to report to the Regulator on how far we have achieved our social aims, enable 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.

¹ www.cicregulator.gov.uk

5 people have been employed by the Homes and Gardens Service during 2007/08. In the early part of this accounting period, UpBEAt employed a full-time Homes and Gardens Supervisor and a full-time gardener and a part-time decorator. During the summer the supervisor left and the role of the Gadgets and Parties manager was changed to incorporate management of Homes and Gardens as well. A further worker was employed on a casual basis.

The Social Audit & Update on Recommendations From Last Year's Social Audit

These 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.

Last year's social audit statement "found no significant area of weakness, but identified a number of important Information Management issues to be taken into consideration during the next social audit cycle". These are listed below, with progress made to date, in italics against each recommendation

- i) That the Project in future refines its consultation process by ensuring that questionnaires are redesigned for specific stakeholders to collect primarily the data included in the scope of the accounts against which performance is being measured i.e. each question should link directly back to specific values, objectives, activities, etc. *We have made questions much more specific this year, but see this as a learning process and have noted in the accounts where we feel further improvements could be made.*
- ii) That future consultation methods are expanded to include a range of methods such as focus groups, interviews, face-to face meeting, observations etc. *We have held two focus groups, three interviews as well as attended meetings with the UpBEAt board and Manager to get further information for these accounts.*
- iii) That the project develops its social accounting system to report more detail on both economic impact and environmental impact. *There is more detailed information on both economic and environmental impact, but we hope that key learning points from this set of social accounts will help to develop this further.*
- iv) That the benefits and added value derived from the partnership with The Elite Group is reported upon in future years. *We have included more details about the relationship between UpBEAt and Elite in this set of social accounts*

3. Mission, Values, Objectives and Activities

UpBEAT's mission is very similar to Bramley Elderly Action's and this is perhaps not surprising as the decision to set up a social enterprise was very much based on the need to provide sustainable funding for and ways of providing trustworthy, value for money and reliable practical services for older people..

UpBEAT's mission is:

'To provide a range of services which enable older people in Leeds to live independent lives'

UpBEAT's values were set by the management committee and staff of Bramley Elderly Action at a workshop in February 2006. In arriving at the statement below, it was agreed that each of the values included a number of aspects. Some of these are listed below.

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:

UpBEAT's objectives were arrived at as the result of a process of business planning, which included staff, volunteers and management committee members from Bramley Elderly Action, business advisors from West Yorkshire Social Enterprise (WYSE) Link and Social Enterprise advisors from Social Business Consulting.

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

By:

Activity 1 Ensuring that staff are experienced and trained in relevant practical skills

Activity 2 Advertising the Homes and Gardens Service across West Leeds

Activity 3 Establishing networks and partnerships to promote the service as widely as possible

Activity 4 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

Activity 1 Ensuring that good practice developed by Bramley Elderly Action in relation to working with older people informs practice and conduct within UpBEAT

Activity 2 Ensuring that all queries are dealt with promptly and work carried out within a reasonable period of time

Activity 3 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

Activity 4 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:

Activity 1 Promoting the service to businesses and customers who will pay a commercial rate/market price for the service

Activity 2 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:

Activity 1 Ensuring that UpBEAT staff are aware of the potential support needs of older people and disabled people

Activity 2 Maintaining good working relationships between UpBEAT and Bramley Elderly Action staff

Activity 3 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:

Activity 1 Advertising vacancies locally

Activity 2 creating volunteering opportunities

Activity 3 Accessing appropriate training and support for staff

Activity 4 Working with local training providers to provide opportunities for trainees

4. Stakeholders

A preliminary list of UpBEAt Homes and Gardens stakeholders was drawn up in consultation with the Business Manager of UpBEAt in May 2008. This basically comprised of the groups, individuals and businesses who we had come into contact with over the course of the year.

Leeds City Council Keeping House Board & Greenfingers project

*Customers - then subdivided into people who:

- had made enquiries/received quotes
- had various kinds of work done (past and present)
- contract/business customers

*BEA Management Committee

*BEA staff and volunteers

*BEA members

*UpBEAt Board

*UpBEAt staff

Local suppliers of materials, and businesses who maintain equipment

The tip

Training providers

This list was then taken to the May Board meeting, for further discussion and amendment. As a result, some additions were made to the list:

*Elite Board

*Elite staff

Elite customers.

*Other Neighbourhood Network Organisations (who may refer customers)

Key stakeholders (*) were identified as those most closely linked to UpBEAt either as receivers or providers of services, people involved directly in governance or organisations who, as partner organisations, support the day to day running of UpBEAt. This list was then used to determine who should be included in the accounting process and also the most effective means of sampling their opinions and experiences of UpBEAt.

5. Scope and Methodology of the Social Accounts

Scope:

In 2006 the decision was taken to focus on one area of operation for each year's social accounting report. The aim was to develop and establish accounting systems which would be sustainable over time and which would inform practice within the social enterprise. This round of social accounts looks at the Homes and Gardens Service. (Last year the focus was Gadgets and Living Aids) A grant from the Big Lottery Awards for All project has enabled UpBEAt to pay workers on a sessional basis to undertake this social audit. As a result, it has been possible to conduct some in-depth interviews and run focus groups, thereby enabling the exploration of issues which may also inform future developments within UpBEAt. Several aspects of UpBEAt have been focussed upon:

- i) UpBEAt's relationship with Elite Group Logistics Ltd, a locally-based company, which has played a large part in the development and support of the social enterprise.
- ii) UpBEAt's relationship with Bramley Elderly Action.
- iii) The structure and functioning of the Board.

During the year under review, UpBEAt has prioritised some objectives and activities over others in its day-to-day operations. Staff changes, the challenges presented by other areas within the company and the ever- pressing need for office and storage space have all had a significant impact. We have indicated throughout the document where this has resulted in there being less to report on particular activities.

Methodology:

A range of methods, both quantitative and qualitative, have been used to compile these accounts. Quantitative data has been derived from questionnaires and also from information collated from estimates, invoices, staff message books and UpBEAt's database. Qualitative data was gained from additional comments on the questionnaires and also in individual interviews and focus groups. In addition, there has been on-going work with the Board, to review its structure and functioning. Some of this (work with the Board) is reported in this set of accounts, some of it was deemed to be more appropriately reported in detail, separately, to the Board.

The questionnaires.

Questionnaires were sent to the following key stakeholders:

- a. customers, subdivided into those who received:
 - i) regular gardening services
 - ii) a one-off gardening service
 - iii) landscaping or fencing work
 - iv) painting and decorating
 - v) Home repair jobs
- b. Customers from 2006/7 who cancelled in this accounting period
- c. people who made telephone enquiries/requested estimates
- d. other Neighbourhood Network organisations for older people in West Leeds
- e. Bramley Elderly Action Staff
- f. UpBEAt Board – which includes 2 Elite Board members
- g. UpBEAt Homes and Gardens staff
- h. Elite staff who have contact with UpBEAt, including staff who managed our contract work at Elite warehouse sites.

It was decided to use questionnaires because this list of stakeholders is extensive and numerous and they would all be asked for similar kinds of information. Examples of the questionnaires are in the additional information at the end of this document. These were printed in a large font (14pt), but on reflection, the option of even larger print, or assistance with filling in the form would have added to the accessibility of the questionnaire.

An ongoing task during this year, in partnership with Elite's IT department, has been to develop a workable customer database. Staff changes in both organisations have caused delays to this and, because it was important to have a viable operating system during the busy season, a paper-based system of record keeping was used. Consequently, for the purposes of this study we identified who should be sent questionnaires by cross-referencing the database with other paper-based records, namely, estimates, invoices, letters and day-book entries.

Questionnaires were posted out with stamped reply envelopes. All questionnaires were anonymous. We were conscious that filling in questionnaires can be tedious and tiring, particularly if people are frail or may have difficulty with reading or writing, so we endeavoured to make them as brief and simple as possible. We also introduced what we hoped would be a more visual and fun element by asking respondents to rate some aspects of the service in numbers of flower-pots.

Questionnaires for customers focussed on quality of service and values, with some additional demographic questions. Questionnaires for staff of Elite and Bramley Elderly Action looked at quality of service and at aspects of the relationship with UpBEAt. Questionnaires to UpBEAt staff and Board members also looked at aspects of job satisfaction, organisational structure, communication, support etc.

Incentives

In appreciation of the time and effort involved in completing questionnaires respondents from groups (a)-(d) (above) were offered the opportunity to be entered into a draw for a £25 store voucher. Anonymity was maintained by asking respondents to return their original envelope (which had their name and address on) or put to their name and address on a piece of paper which would be separated out before reading the questionnaires. Bramley Elderly Action and Elite staff were sent a chocolate bar, to support the suggestion that they could fill in their questionnaires in the time it took to have a tea break. All forms were given out as hard copy, with a return by date and a stamped return envelope or with details of where to hand in the envelope.

The methods cited here were an attempt to avoid the low response rates experienced when compiling last year's social accounts (Gadgets and Aids 2006/7) and were also, we hope, good practice. Most of the questionnaires were sent out by post, although some to BEA and Elite staff were given out personally. BEA staff were also offered the opportunity to fill in the forms electronically.

Focus groups

Two focus groups were consulted in the course of preparing this report.

1. Questionnaires sent to customers also included an invitation to attend a focus group for more in-depth discussion. Ten customers responded to this offer – two from LS12, seven from LS13 and one from LS16. Of these, five were able to attend on the day. Transport was provided for everyone plus light refreshments and a pot plant as a `thank you`.
2. The opinions and experiences were sought from one of BEA's regular social groups. It was felt that this would give a broader perspective on UpBEAt and its services, since there was no presumption that everyone there would be a customer. More than twenty members were present and participated in the discussion, then partook of some excellent refreshments!

Individual Interviews.

Interviews were carried out with three members of the Board. This approach gave an opportunity for more expansive replies to the issues raised in the questionnaires to Board members. It also acknowledges the likely qualitative differences in information given in writing and in one-to-one discussion.

The newly appointed Co-ordinator of BEA was also interviewed, to explore in some detail the nature of the relationship between UpBEAt and BEA. During the data-gathering phase of compiling these accounts, it had become increasingly apparent that this relationship was under the spotlight, prompted in part by the retirement of the previous Co-ordinator/ Executive Director of UpBEAt. Much of the

detail of this interview was beyond the scope of these accounts and has been reported separately to the Board.

Not all stakeholders were consulted about all objectives, since some had less validity for particular groups. The aim was to consult on areas of interest for specific groups and to keep the scope and length of questionnaires proportionate to each stakeholder group.

Reflections on the methodology

Throughout the accounting period 2007-8 a number of factors have made it difficult for UpBEAt to ensure continuity of record-keeping systems and this, in turn, has had an impact on the accuracy of figures relating to client numbers which we required for this audit. Factors such as the seasonal demands of the work, changes in UpBEAt personnel and staffing structures, experimenting with different options for increasing office and storage space have all had a significant impact.

We acknowledged the potential for a poor response rate to questionnaires due to:

- the time lag between having received a service, making an enquiry or requesting an estimate, and subsequently receiving a questionnaire about that service.
- It might also have been due to people simply not remembering having had any contact with UpBEAt, moving away or just not wanting to participate. Cross-checking with Bramley Elderly Action's membership records identified 22 people who had died or moved out of the area. However, it should also be noted that not all UpBEAt's customers are known to BEA and so cross-referencing was not possible in all cases.

It was hoped that including a stamped addressed envelope for replies and offering an incentive to respondents would increase the response rate. This has inevitably added to the cost of the report and may not be feasible in future years.

People who wanted more information about the questionnaire were offered the opportunity to contact us by using the return envelope, as it was not practical to manage telephone enquiries. In the event, no-one took up this offer. On reflection, it would have been more inclusive to also offer the opportunity for people to request a phone call, or even a visit to complete the questionnaire with them. This would have acknowledged that not everyone is able to complete paper questionnaires and given the opportunity for discussion and follow up.

There were also some practical difficulties with posting out chocolate bars but, as this was done for a very small number of participants, it was minimal.

Whilst every effort has been made to ensure anonymity, there are inevitable limitations to this:

- where there are very small numbers of an identifiable group, for example staff or Board members, comments may be easily attributable to them.

- where comments relating to problems or complaints have been quite specific, respondents may be easily identifiable. Whilst it is recognised that some people may be happy for these to be reported verbatim, this had not ascertained beforehand; therefore, for the purposes of this report, comments have been generalised to ensure anonymity.

Rather than include all comments from questionnaires in this report, we have used those comments which either summarise a general consensus or which highlight significant issues or key learning points.

In the course of compiling these social accounts, a number of issues which were not pertinent to this accounting period, and one issue which was confidential were raised. These have not been reported on in these accounts but have been passed on to the UpBEAt board for their information. This has been discussed with the chair of the accounting panel

Table 1 gives details of the numbers and range of questionnaires sent out and the response rates.

Questionnaires sent out to:	By area			Total sent	returned
	Bramley	West Leeds	elsewhere		
Regular gardening customers	76	12	2	90	37 (41%)
One-off gardening customers	36	16	2	54	13 (24%)
Landscaping/fencing customers	13	2	0	15	4 (26%)
Decorating customers	9	1	0	10	3 (30%)
Home repairs customers	2	3	0	5	5 (100%)
People making enquiries	19	10	6	35	5 (14%)
Customers who cancelled	27	3	0	30	12 (40%)
People requesting estimates	5	2	1	8	1 (12%)
	187	49	11		
Contract/business customers	2			2	0*
Other Neighbourhood Networks	5			5	1 (20%)
BEA Staff	7			7	6 (85%)
UpBEAt Board	7			7	6 (85%)
UpBEAt Homes & Garden Staff	5 **			5	3 (60%)
Elite Staff	6			6	5 (83%)
				269	101 (38%)

Table 1

*This does not include contract work with Elite. As we were looking closely at UpBEAt's relationship with Elite, specific service questionnaires were not sent out to them.

** This figure includes all staff who have worked for UpBEAt Homes and Gardens during this accounting period

Most of the figures and tables in this document combine the responses from the same or similar question across all questionnaires. It was not possible or practical

within the scope of these accounts to make comparisons across all the questionnaires because there was such a disparity in the numbers of customers for the various services and in the response rates across the services. Responses have been recorded for each of the services elsewhere so that comparisons can be made between the same services in future years.

6. The Report on Performance: Analysis of the Social Accounts

Values. "In all that we do, we endeavour to act with vision, respect, integrity and vitality".

VISION : forward thinking, innovative, seeing potential in people.

Forward thinking

The experience of Bramley Elderly Action, and of all Neighbourhood Network organisations for older people in Leeds, is that it is not possible to ensure ongoing, long-term funding through grants from charitable trusts to provide free or subsidised practical services for older people. Neither has it been possible to do this through service level agreements with statutory providers, such as health or social services. Research carried out by the Joseph Rowntree Foundation² points to the need for 'affordable, available practical services to enable older people to maintain their independence in their own homes'. UpBEAt hopes that, by setting up the Homes and Gardens area of operation, they will be able to ensure a sustainable means of providing this service in the future for older people in Bramley and possibly West Leeds.

Innovative

Consultations had been held in previous years with BEA staff, management committee members and older people and as a result UpBEAt Homes and Gardens offered a number of innovative ways to promote the service:

- a gift voucher scheme so that family could contribute towards the cost of gardening by purchasing vouchers. These were produced 'in house' and could be for any amount. This was offered to customers in our advertising literature and also through Bramley Elderly Action's newsletter
- a 'pay for 6 visits, get the 7th visit free' scheme to reward regular users of the service

There was no take up of the voucher scheme during this accounting period. This may have been due to the limited advertising. Although some customers did use the '7 for 6' scheme, it has not been possible to identify how many from the records.

² The Older People's Enquiry 'That Little Bit of Help' JRF 2005, York, www.jrf.org.uk

Innovative relationships

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

The relationship came about through Bramley Elderly Action and Elite's involvement in the West Leeds District Partnership, the local strategic partnership responsible for regeneration in the locality. Stewart Firth, a director of Elite and 'theme champion' for Enterprise and Economy on the Partnership, accepted the invitation to join a group of local business people helping Bramley Elderly Action explore the possibility of setting up a social enterprise. He has been involved with UpBEAt ever since! One of the directors of Elite is on the board of directors of UpBEAt and Stewart attends in an advisory capacity

This innovative relationship was recognised in an article by on social enterprise by Dr Chris Lowe of Huddersfield University³, and also in a DVD on local enterprise made by Leeds Keeping House Board.

"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

In October 2008, Stewart received one of the first-ever Leeds Awards, in recognition of his work in transforming local lives through his business Elite Group Logistics. His name is now cited on a plaque in the Civic Hall.

The benefits of this innovative 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 and accountancy skills and payroll system and the production of monthly and annual financial figures
 - safe storage for equipment, parking for company vehicles and paying-in facilities for cash payments from customers
 - Access to cardboard re-cycling facilities
 - employment of UpBEAt staff at Elite's warehouses during bad weather
 - training for UpBEAt staff in aspects of health and safety relevant to their work at Elite
 - Use of Elite's board room for meetings

"the help and advice of Elite"

UpBEAt Board Member questionnaire response ('something which has given me satisfaction')

³ 'I do get a kick out of CICs' – Chris Lowe, Social Enterprise 1107, Issue 63 (Dec 06) – see UpBEAt's social accounts 2006/07

The benefits for Elite are perhaps less tangible and modestly referred to in the Keeping House DVD by Andrew Joyce, one of the directors:

“It’s 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

Further examples of this relationship are referred to in the section on the structure and functioning of the Board.

Staff from BEA and Elite were asked for their opinion about UpBEAt as an innovative, creative organisation. The response was mixed: one out of six BEA staff agreed strongly with the statement, two agreed, two neither agreed nor disagreed and one disagreed. Elite staff were asked for yes/no responses. Two out of the five said yes (ie UpBEAt is an innovative, creative organisation) one said no and two said that they didn’t know. This perhaps reflects the more practical nature of working relationships with staff within these organisations, but might also suggest the need for improved communication and sharing of ideas on UpBEAt’s vision and values.

Seeing potential in older people

This is an essential part of the ethos of Bramley Elderly Action, which has been carried over into UpBEAt. It has been put into practice in a number of ways:

- consulting with older people and those with experience of working with older people about the service provided by UpBEAt. This was an important part of the setting up of the service and, although there have been only limited resources to develop this further during this accounting period, we have again consulted with Bramley Elderly Action members as part of the preparation of this social accounting report.
- older people sit on UpBEAt’s Board, thereby ensuring that the interests of Bramley Elderly Action are represented.
- exploring how UpBEAt might add value to the gardening service through offering ways to encourage and enable older people to maintain their interest in gardening. At this stage in the development of the business there are insufficient resources to set up a gardening club through UpBEAt. It had been hoped that this could be achieved in conjunction with Bramley Elderly Action, but unfortunately, an application to Leeds City Council’s Community Chest for funding of a pilot project was not successful. There may, however, be other opportunities to pursue this in future. One of the focus group participants suggested that, since allotment gardening is becoming popular again, waiting lists could be reduced by teaming people up with older people who can no longer manage large gardens.

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

“different things matter to different people.....”

(Focus group member)

All the questionnaires to customers included questions on age, gender, disability and ethnicity. Having this information will enable UpBEAt to monitor the range of customers and whether customers are representative of the older population in the area.

Gender

Of the 80 people who returned customer questionnaires, 54 were women and 16 men, 5 people added 'couple' to the possible options and 5 did not answer. The higher than average response rate from women may be due to a number of factors:

- men traditionally take on the heavier and practical tasks, such as gardening, decorating and home maintenance and often carry on with this into later life.
- greater life expectancy for women results in more women living alone, particularly in the 80+ age group and they are often less able to do physically demanding tasks such as gardening or decorating.
- there are more older women than men in caring roles, leaving less time for undertaking practical tasks, such as gardening or decorating.
- UpBEAt's customer base is closely linked to Bramley Elderly Action's membership, which has more women members.
- The service offered by UpBEAt may not be appealing or appropriate to older men.

As four of the twenty(+) people who attended the Bramley Elderly Action focus group, we took the opportunity to address some specific questions about their feelings with regard to needing to get someone to do tasks which they were no longer able to do. Whilst some of the men admitted to feeling 'frustrated' and 'cross', on the whole they took a fairly practical approach:

“gardening goes first”

“My gardening is now down to weed killing – Round Up - it costs me a fiver and lasts me a year”

“If I want any work doing at all I'm prepared to pay to have it done professionally”

Comments from men at the Bramley Elderly Action Focus Group

We also queried whether, if men were no longer able to do tasks they had practical knowledge of, this influenced their expectations about levels of skill and service.

“If you're in my house and you're going to do something for me and I'm paying for it, I'll tell you what I want”

Comment from a man at the Bramley Elderly Action Focus Group

There has not been scope within these accounts, to explore these issues in depth, but it may be an area for further exploration in the future as a way of informing service development and provision. Most organisations which work with older people in the statutory and voluntary sectors, commercial or otherwise, are familiar with gender-differentiated responses to needs and services; understanding and addressing these may present business opportunities for UpBEAt in the future.

Ethnicity

In answer to the question 'how would you describe your ethnic origin', 72 people said 'British' or 'English', one person said 'Irish', one 'Pakistani' and six left this question unanswered. Bramley has a lower than average number of residents from black and minority ethnic (BME) communities (6% compared to 11% in Leeds as a whole)⁴. The national figure for people over 65 from BME groups is 3% and 2% for people over 65 of white Irish origin⁵. The response rate for the area is therefore likely to be fairly representative.

Home support services which meet the specific needs of BME elders is an issue that Leeds City Council's Keeping House Service is monitoring and this might present opportunities for development in the future.

Age and disability

Figure 1

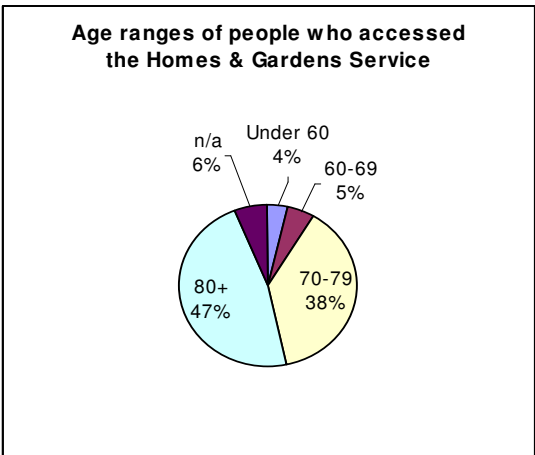
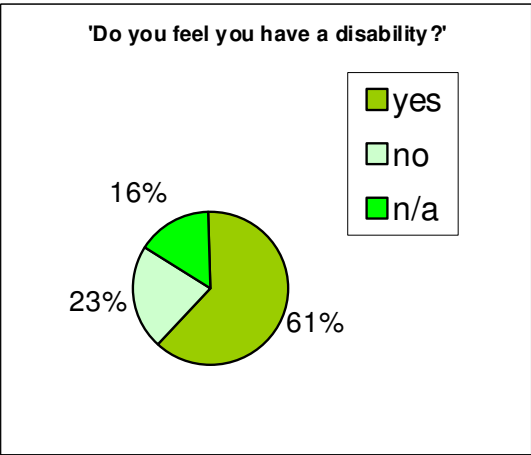


Figure 2



The information in figures 1 and 2 shows that the majority of people who used or made enquiries about the Homes and Gardens Services are over the age of 80. A high percent also feel that they have a disability. As these factors have close links with social isolation, priorities identified by Leeds City Council's Keeping House Service, the Primary Care Trust and Local Arms Length (Housing) Management

⁴ www.statistics.gov.uk

⁵ 'Age & Ethnicity In England – a Demographic Profile of BME Older People in England' Age Concern England. Feb 2007

Offices (ALMOs), there may be opportunities in the future for UpBEAt to work with these agencies in addressing these key issues.

Some of the indicators of respect which we looked at in these accounts were:

- showing understanding of the needs of older people
- showing understanding of the needs of people with disabilities and sensory impairment
- showing understanding of the needs of black and minority ethnic elders
- offering a service which respects individual's preferences, tastes and rights to choose

Examples of this are:

- 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 and respecting their wishes and choices
- offering free, non-binding quotations for work
- producing information in appropriate formats and distributing it to relevant agencies and outlets.

Low-maintenance gardens:

UpBEAt has not kept specific records on the number of low maintenance gardens/tasks that have been carried out, but information taken from written estimates indicates that there have been approximately nine; for example -

"Left hand side of back garden, to lay weedex down and cover with bark chippings, relaying the flag stones on top, remove any large weeds. Also down the right hand side of garden there is a small border, remove all weeds, lay weedex membrane with gravel on top"(work completed 19/06/07)

Safe surfaces:

"to pressure wash flags clean firstly. To lift all flags in the back garden and remove old concrete path. 9-10 new flags needed to cover where the concrete path used to be. To lay new hardcore to level then add a layer of membrane, lay flags down on a bed of sand, flags will have a fall from the house to the back of garden to let water run. Also make holes in back wall to let water run through"(October 2007)

Working with clients on designs or personal requirements:

"all main grass area to be dug out and dropped 3-4" and waste to be taken away. Edging stones to be laid to the front and side of garden as a retaining edge to keep

gravel in. Small wall to be built at the rear of garden in a half moon shape 3-4 courses high (customer has the brick for this) ...Then the main part of the garden to be gravelled in 20mm gravel and 10 small round circle stones to be put as a path from the front to the rear of garden.”(Work completed 25/5/07)

“To take down old metal frame and take away if necessary, fit posts to wall and make a new gate to fit at a height of 2 metres (about 7ft) plus fittings and catches. I did price new, ready-made gates. They were around £220 to £300 so what I have done is priced for making a new one, if you have seen anything you like, you can call me and tell me” (17/07/07)

The cost of this job was £170 in total, so saved the customer quite a lot of money.

Reduced vulnerability:

Tidying and maintenance of gardens and properties is known to promote safety and reduce vulnerability to bogus callers and distraction burglaries. It also enables older people to maintain tenancy agreements.

“Without them, we couldn’t keep our gardens as we have”

UpBEAt Homes and Gardens Customer: ‘Keeping House’ DVD

Examples of respect:

Respect was measured through questions 3 and 4 (b): ‘How satisfied were you that staff were polite and courteous’ and question 3 (g): ‘how satisfied were you that staff understood what you wanted’. The plant-pot scoring system was used for this, where 1 was a low score (ie, not satisfied) and 5 was high (ie very satisfied). Tables 2 and 3 show the results across all services.

The A columns in table 3 represent scores for how people felt they were treated at their first enquiry and the B columns show the scores for how they felt they were treated by the staff who carried out the work.

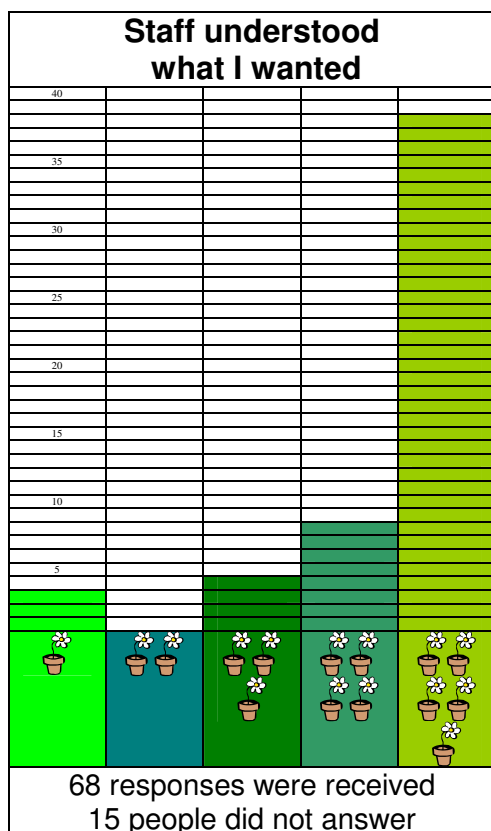


Table 2

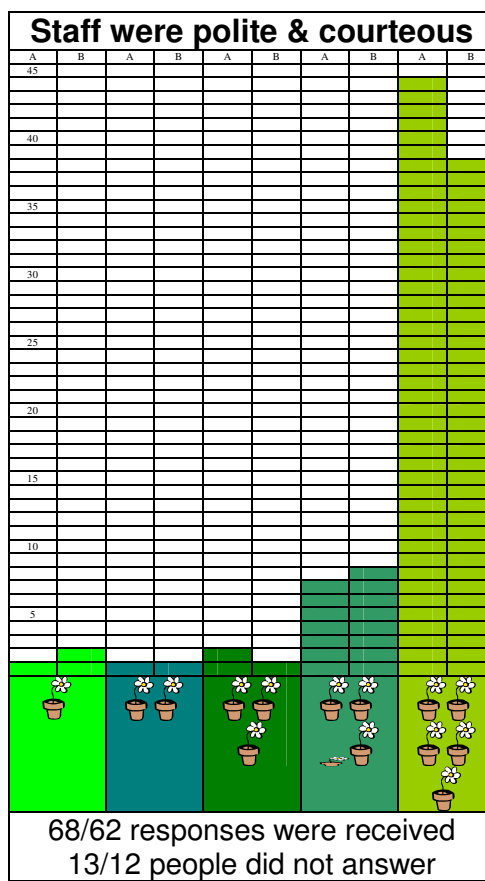


Table 3

“Attentive staff and willing to oblige. Very pleased with the work done”

“They endeavour to do what I ask”

UpBEAt Homes and Gardens Customers

The discussion at the groups reflected general satisfaction with clarity of information, although there were also different levels of expectation, with some people wanting to be involved in determining what tasks needed doing whilst others were happy to leave the decisions to the gardeners, or perhaps say what they wanted at the beginning of the season and leave it at that.

There was some disagreement between members at the focus group about whether they needed to be in when the gardeners called and whether gardeners needed access to power for tools. This suggests a need for clear, written information for customers, not only to avoid confusion and possible anxiety, but also so that they are aware of what they can expect to get for their money.

The questionnaires also asked about clarity and accuracy of written and verbal information. Responses to these questions are shown in tables 4-6 on the following page. Examples of advertising materials used are included in the additional material at the end of this document. We recognise that not all potential service users are comfortable with written information so we asked further questions about clarity of information and communication at focus groups.

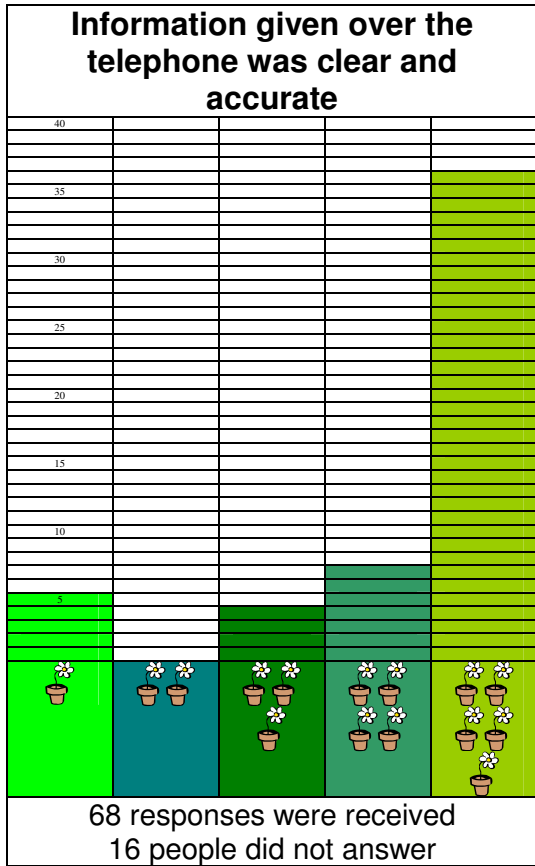


Table 4

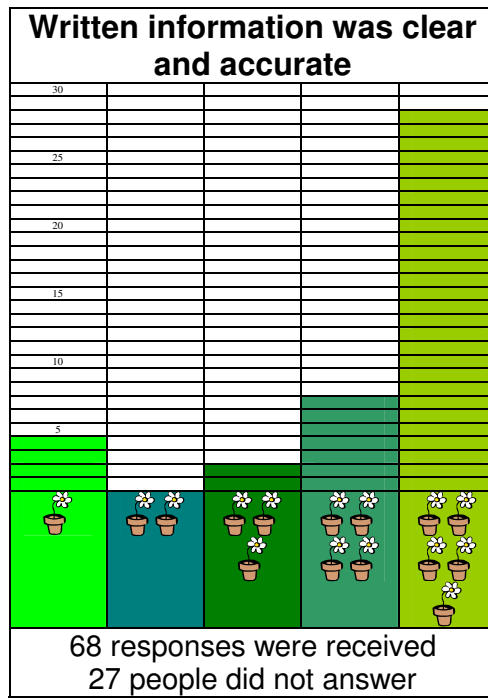


Table 5

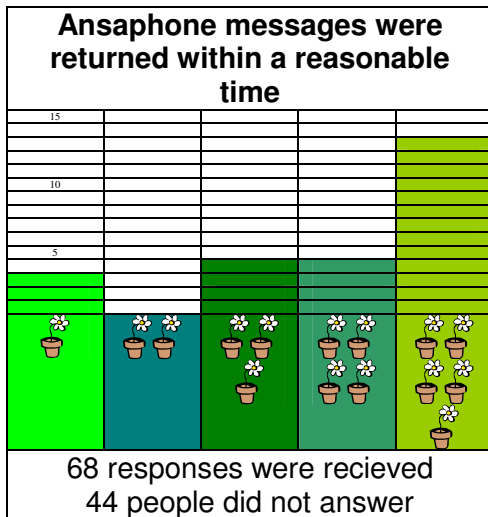


Table 6

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

Customers were asked how satisfied they were that UpBEAT Homes and Gardens Service is trustworthy and reliable and how satisfied they were that work was carried out safely and their homes left tidy. Tables 7 and 8 give the results for this.

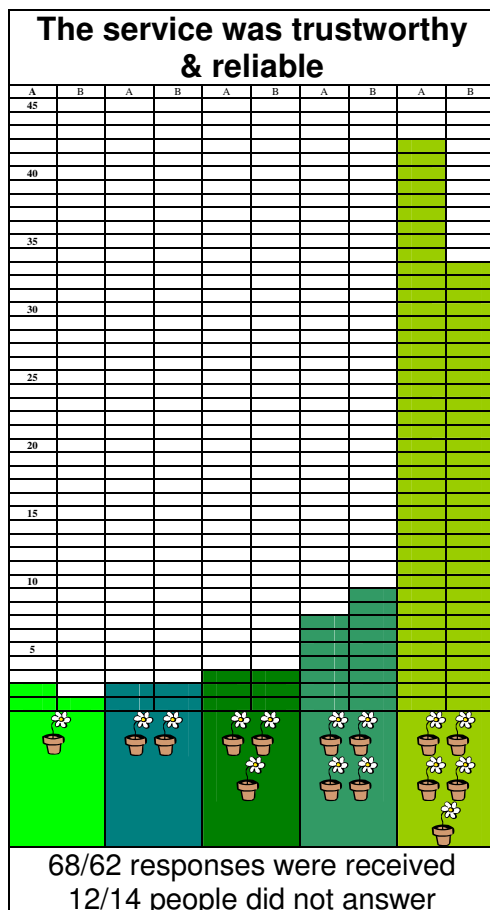


Table 7

1 plant pot = not at all satisfied and 5 = very satisfied. In table 7 the A columns represent customers views on first enquiry and the B columns represent their views on the delivery of the service they received.

“Work to my property has always been satisfactory”

UpBEAT Homes and Gardens customer

“They’re very, very trustworthy”

Quote from UpBEAT Homes and Gardens customer on ‘Keeping House’ DVD

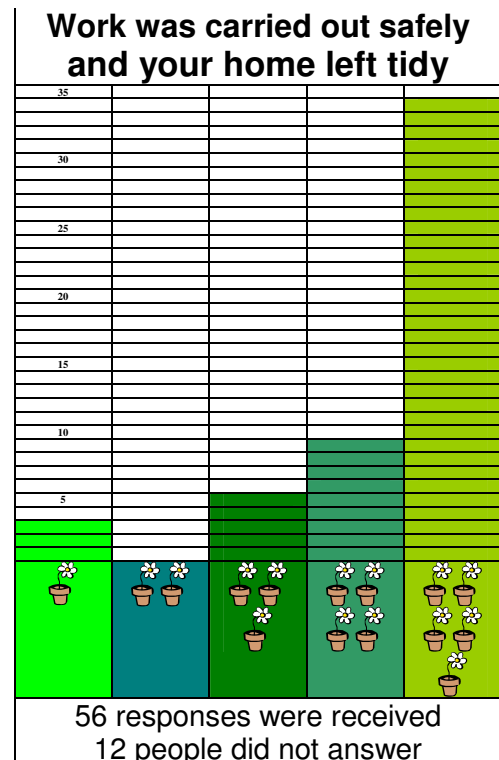


Table 8

In order to measure 'promoting confidence in UpBEAT', customers were asked whether they would be prepared to recommend UpBEAT Homes and Gardens Service. Their responses are shown in figure 3

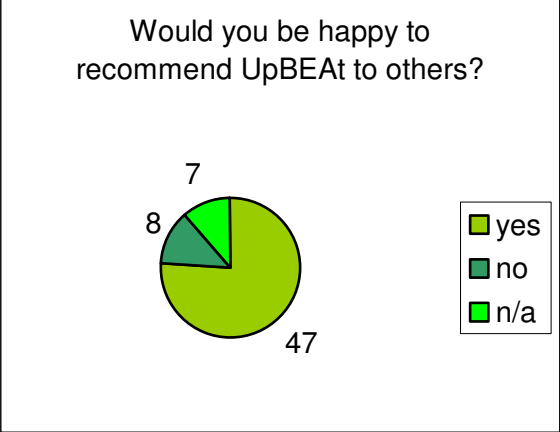


Figure 3

Bramley Elderly Action staff were asked how strongly they agreed with the statement 'I am happy to refer older people to UpBEAT Homes and Gardens Service. 4 out of six staff agreed, one agreed strongly and one neither agreed nor disagreed

Customers, UpBEAT staff and board members were all asked to award plant pots for how well they felt UpBEAT Homes and Gardens Service is achieving their values overall. Their responses are shown in tables 10-13 on the following page. 1 = a low score and 5 is high.



Table 10

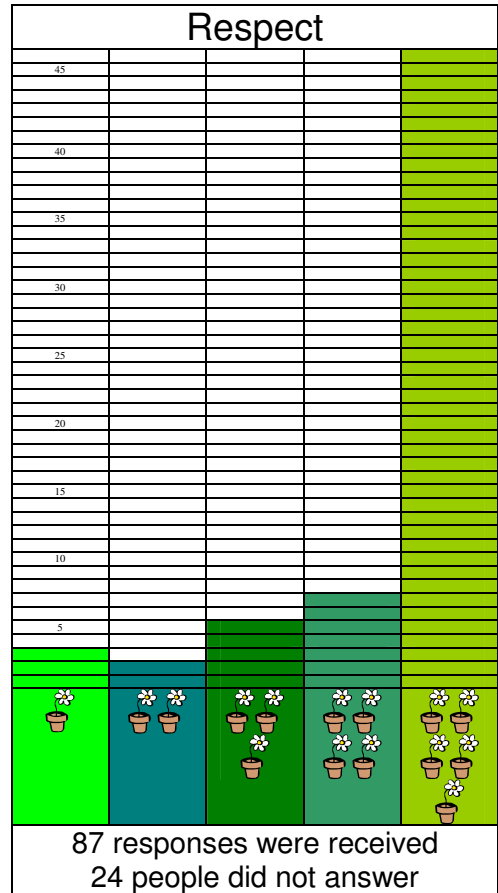


Table 11

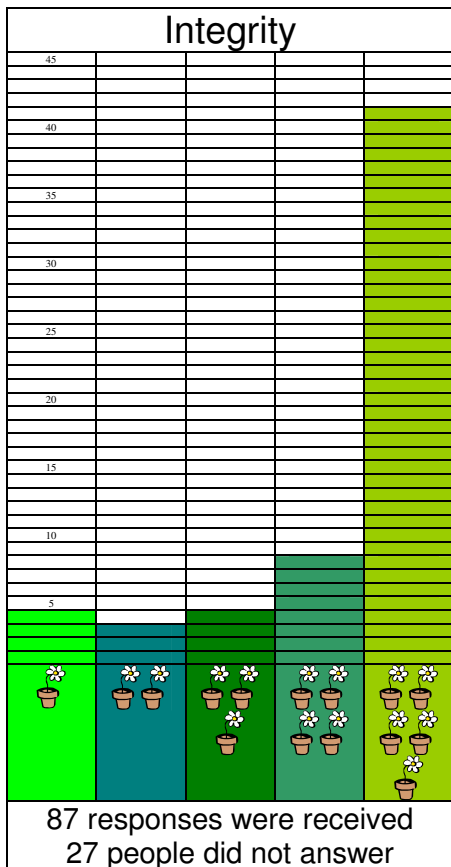


Table 12

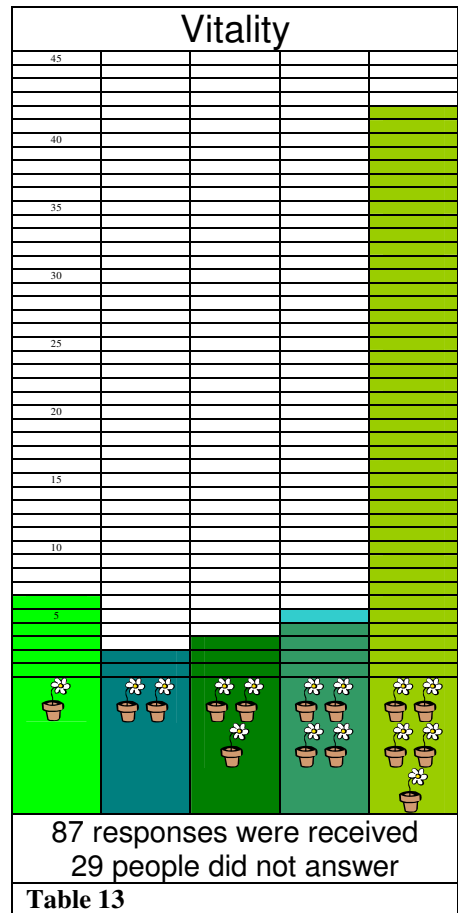


Table 13

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

Some of the comments in questionnaires about staff who carried out work reflect these qualities of vitality:

'They were cheerful and happy and helpful'

'Because they endeavour to do what I ask'

'Attentive staff & willing to oblige, very pleased with the work done'

UpBEAt Homes and Gardens Customers

'I'm motivated by seeing passionate people. It's invigorating. In UpBEAt, everyone is genuine. You can't knock their desire'.

Comment from Interview with UpBEAt Board member, on 'something which has given me satisfaction'

Whilst everyone who answered the questions on values gave high scores overall, there was quite a high non-response rate, particularly from customers. It may be that people found this a difficult question to understand or answer when presented in a questionnaire and something which is better explored in focus groups or interviews. Not all of the non-responses came from the same questionnaires, so almost all respondents did give a score for some or all of the values. There were comments such as 'couldn't say' on some of the questionnaires. We have tried to explore perceptions about values in more depth in the focus groups and one to one interviews, particularly with Board members and staff.

'Vision – yes. Integrity & Trustworthy – no hesitation in recommending our services. Respect and vitality – full marks most always'

UpBEAt Board member questionnaire responses

Summary and Learning Points:

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 in the 'plant pot' scoring system 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 etc.

In response to recommendations in last year's report, more work has been done to measure equality impact issues. UpBEAt appears to have 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.

There were 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.

Analysis of Individual Objectives and Associated Activity

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

By:
Activity 1 Ensuring that staff are experienced and trained in relevant practical skills

UpBEAT's recruitment process includes questions on relevant experience and training and staff have been recruited on the basis of this. Because of changes in personnel and staffing structures over this accounting period it has been difficult to maintain staff training records. This is an aspect of good practice and quality assurance which UpBEAT should address in future. Since information on training and experience was limited, the questionnaire to UpBEAT staff asked what training had been undertaken during their employment with UpBEAT overall, where this training had been and also how much time had been spent in training in the past year.

Of the three responses from staff, during the past year:

- 1 received less than 1 day's training
- 1 received between 1 and 5 days' training
- 1 received 5+ days of training

During their time at UpBEAT:

- 2 members of staff had received training in Health and Safety
- 2 members of staff had received training in Gardening/horticulture (NVQ)
- 1 member of staff had received training in Landscaping/fencing
- 1 member of staff had received training in Safe use of chemicals
- 1 member of staff had received training in IT skills

The NVQ training was delivered 'in house' over a period of several months by an external trainer through the 'Train to Gain' scheme. Other training was received on external training courses and at Elite's warehouse. Additional training has been organised for staff, but there is no formal record of this.

Customers were asked how satisfied they were that staff had the knowledge and skills to carry out the work and Table 16 shows the results for this.

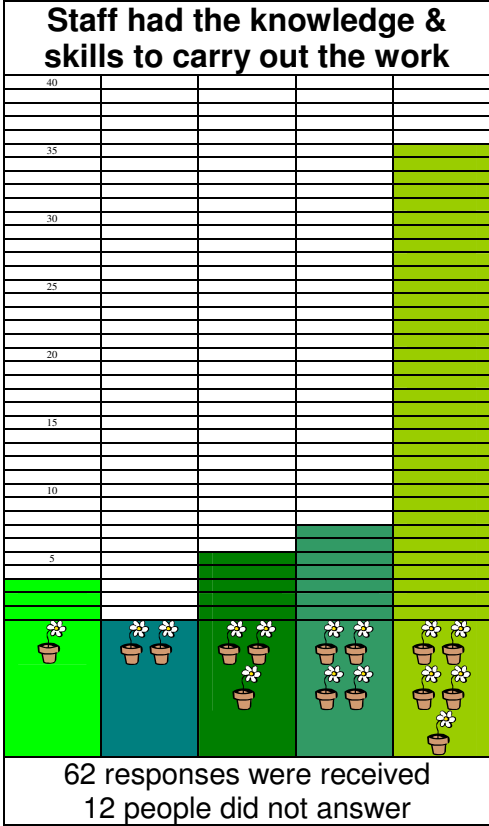


Table 16

“It was a good job”

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

“Insufficient skill....”
UpBEAt Homes and Gardens Customers

“make it look as if someone’s been – not just the grass but do the edges”
Bramley Elderly Action Focus Group Member

Activity 2 Advertising the Homes and Gardens Service across West Leeds

During this accounting period UpBEAt Homes and Gardens Service was advertised in the following places:

- The Bramley Elderly Action newsletter and annual report
- to other Neighbourhood Network organisations in West Leeds and beyond using flyers
- to businesses, housing associations, churches and schools in the area (reported later in this document)
- on the Keeping House Website as a provider of Homes and Gardens Services⁶
- at a Leeds Ahead networking event in January 2008

Table 1 at the beginning of this report shows the geographical distribution of customers who received services during this accounting period. Non Bramley Elderly Action members pay a higher price for services but this reflects the higher costs incurred when working further away. Having the majority of customers within a small geographical area means that work can be scheduled in blocks to make the most efficient use of time and fuel. This is something which has been reviewed since this accounting period.

⁶ <http://www.keepinghouse.org.uk>

Activity 3 Establishing networks and partnerships to promote the service as widely as possible

UpBEAT's links with Neighbourhood Network organisations across Leeds and with Leeds City Council's Keeping House Service have been important city-wide contacts. Figure 5 shows the range of ways in which people who accessed UpBEAT Homes and Gardens Services got to hear about the service. It indicates that Bramley Elderly Action is by far the main source of referrals, followed by other Neighbourhood Network organisations across West Leeds and the city.

The Bramley Elderly Action social group focus group gave more insight into how older people find out about services such as gardening and decorating:

“By word of mouth – you can't beat word of mouth”

“Church magazine”

“You've got to ask”

“First Checkpoint. There's an extra charge”

“Don't have anybody come and knock at your door and think 'I'll let them do it!'”

Bramley Elderly Action Focus Group members

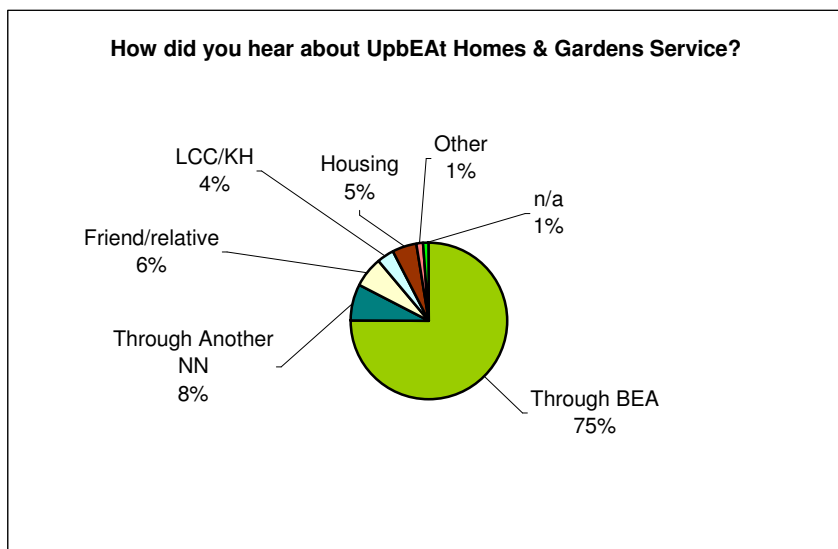


Figure 4

Activity 4 Being aware of relevant industry standards and good practice and seeking to incorporate these into UpBEAT's working practices and customer relations

UpBEAT's approach to the development of good working practices and customer relations has been guided in the early stages of its development by research with local older people and understanding of their needs through its partnership with Bramley Elderly Action. This could be an area for future development.

Summary and Learning Points

A range of training and career development opportunities have been provided for staff over the year, including NVQs and opportunities to train through Elite. UpBEAT would benefit from a more systematic approach to the planning and recording of this.

The report shows that the majority of work has been locally based with the majority of referrals from Bramley Elderly Action membership. There have been 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

By

Activity 1 Ensuring that good practice developed by Bramley Elderly Action in relation to working with older people informs practice and conduct within UpBEAT

Activity 2 Ensuring that all queries are dealt with promptly and work carried out within a reasonable period of time

All customers, people who made enquiries and requested estimates were asked how satisfied they were with how promptly enquiries were dealt with. Customers were also asked how satisfied they were that the work was carried out within a reasonable period of time. The plant-pot scoring method was used for these questions. Tables 17 and 18 show that the majority of customers gave the maximum scores for this. Customers were asked whether they felt that queries about the work had been dealt with to their satisfaction. Table 19 shows the responses to this.



Table 17

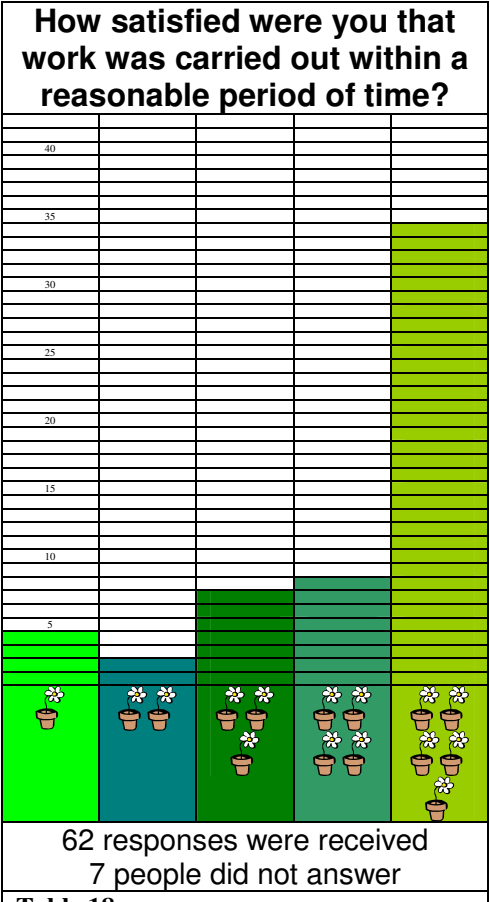


Table 18

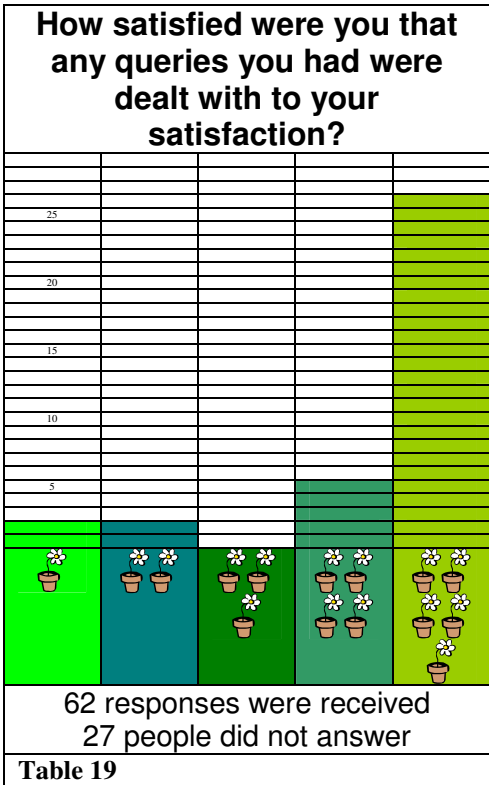


Table 19

Activity 3 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

Everyone who received a service from UpBEAt Homes and Gardens Service was asked in the questionnaire if they had any complaints about the service they had received, whether they had passed on these complaints and whether they felt that the complaint was dealt with to their satisfaction. Of the 62 responses:

16 people had a complaint about the service they received
37 people had no complaints about the service they received
9 people did not answer

The spread across the services was:

Regular gardening:	8
1 off gardening:	4
Home repairs:	2
Decorating:	1
Landscaping:	1

It is difficult to infer anything from the distribution of complaints. Regular gardening and 1-off gardening were the most frequently provided services and as such would be expected to feature most prominently in the responses. As there were only a small number of returns from the other services, it is not possible to know whether there were a disproportionate number of replies from people who had complaints.

Of the 16 people who did have a complaint about the service they received:

3 people made the complaint to the member of staff who carried out the work
7 people made their complaint to the UpBEAt office
6 people did not pass on their complaint

Respondents were asked to say why they didn't pass on their complaints. The only comment was 'did not want to upset people'. Opportunities to offer complaints, compliments or suggestions are not routinely offered as part of the Homes and Gardens Service. This is something which should be offered in future as a matter of good practice and quality assurance. Customers who had cancelled the service were asked to state the reason as a means of finding out if this related to a complaint or the way in which it was dealt with. Of the 12 people who answered:

8 said it was due to the cost
2 said it was due to the cost *and* the quality of work
0 said it was due to the overall service
4 said it was because a family member or friend now does their garden

Only one of the people who cancelled the service had passed on a complaint. This was passed on to the UpBEAt office. Two people said that they didn't pass on their complaint and nine did not answer this question. Three people specifically commented that they did not have a complaint about the service, as did two people on questionnaires to other customers. Handing out customer satisfaction surveys and written information about complaints, comments and compliments might make it easier for people to raise concerns, as well as pass on other comments.

All the questionnaires gave space to add comments about cost, quality of work, quality of service, finding alternative ways of having their gardens done, or suggestions as to how the service could be improved.

Of the 25 comments which were made in these sections:

9 related to people's feelings that the cost of the service (gardening) was too high.

4 of these were specifically about having two gardeners and paying twice the hourly rate:

"Nobody told me it was £17 per hour each person..."

"I didn't like what they charged last time, I said I didn't want two gardeners"

UpBEAt Homes and Gardens customers

Similar comments were made at the focus groups and may be something to consider when planning delivery of the service in future since it may contribute towards people feeling that the service is not good value for money.

Other comments related to:

Feelings about a poor quality service, or problems with a particular job (3 comments)

Poor communication, for example where customers were not told if the gardener wasn't able to come on the agreed day, or messages weren't passed on (6 comments)

"Need a dedicated person who can log calls and pass the messages on"

"It was really that I wasn't informed that the gardener had been injured. If I had known, I would not have complained"

UpBEAt Homes and Gardens Customers

In addition there were two requests for the service to be available across a wider area and two requests for more frequent visits.

As a general measure of whether people felt that the service was reliable, trustworthy and good value for money, customers were asked whether they felt that the service they had received from UpBEAt Homes and Gardens was better, worse or

about the same as the service they had received from other trades people and also whether they would use UpBEAT again. The results are shown in Figures 5 and 6

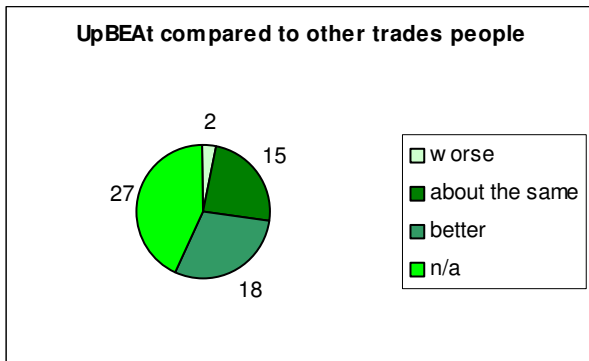


Figure 5

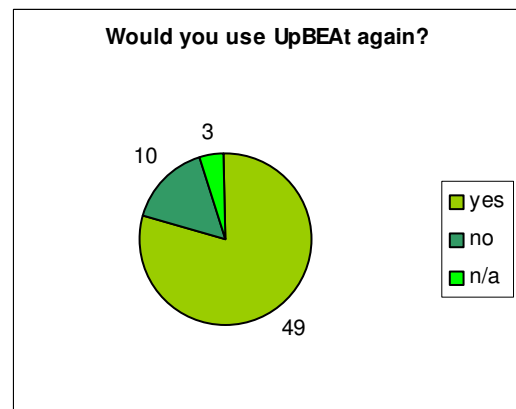


Figure 6

It is possible that the high non-response rate for this question was because people did not have experience of other trades people and so couldn't make comparisons. The majority of comments were from people who felt that the service was as good (5 comments) or better (9 comments) than other trades people. The one comment from someone who felt that the service was worse, referred to 'insufficient skill'. Customers were asked how satisfied they were that the service they received was value for money. The results are shown in table 21

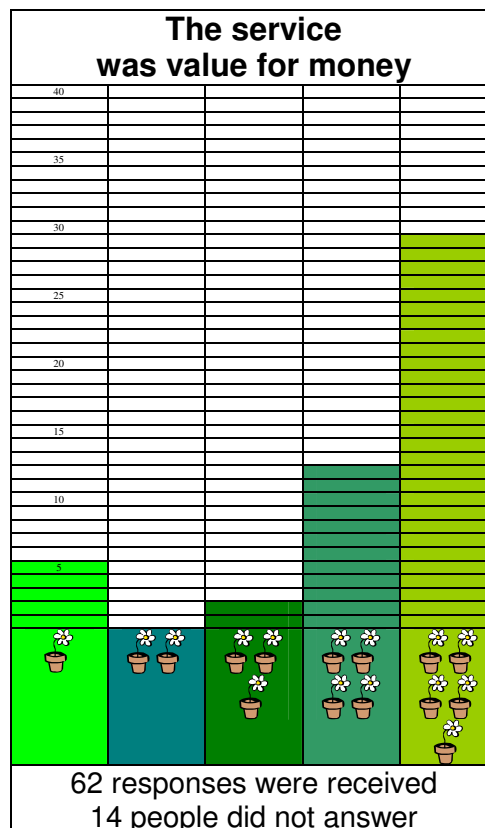


Table 21

The discussion at the customer focus group gave more opportunity to understand some of the added value which an ongoing relationship with a regular gardener provides:

Steve power washed the flags – very satisfied”.

“Steve does it how I want it. I know him. I’m content to have someone I know. He’s a nice lad”.

“I like the fact they don’t smoke”

“He wouldn’t walk through the house”.

UpBEAt Customer Focus Group

Whilst one member of the group expressed evident frustration at work not being done to her satisfaction, others were mostly positive and described how the ongoing service had helped them to continue to manage to maintain their homes and gardens despite the demands of caring or the difficulties of bereavement or deteriorating health.

The discussion also highlighted the need for more information about services, particularly those which would be of particular interest to older people such as power washing paths.

Other stakeholders were asked for their opinion on how well UpBEAt achieved the objectives of providing a trustworthy service and a value for money service. Tables 22-24 compare their responses to the question on how strongly they agree with the statements about the service. It should be noted that these stakeholders have contact with operational aspects of UpBEAt rather than as customers and their responses perhaps reflect some of the operational issues which have resulted from change and development within the organisation over the year.

UpBEAt provides a:				
1	2	3	4	5
Trustworthy service				
Value for money service				
BEA Staff				

Table 22

UpBEAt provides a:		
Yes	No	D/k
Trustworthy service		
Value for money service		
Elite Staff		

Table 23

UpBEAt provides a:				
1	2	3	4	5
Trustworthy service				
Value for money service				
UpBEAt Board				

Table 24

Activity 4 Involving older people in running the business and planning services

The challenges of developing the Homes and Gardens service this year have meant that this activity has not been prioritised during this accounting period. Three of the seven UpBEAt Board members are over 60 years of age. Two of these are Directors and active members of Bramley Elderly Action, and as such represent the views and needs of older people.

The detailed information from the focus groups with older people (both users and non-users of the service) which were done as part of this social audit will be a useful tool in planning future service development.

Summary and Learning Points

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 both existing and past customers and found that most related to the cost of the service (and value for money in view of this) with many people disliking the practice of sending two gardeners and charging twice the hourly rate. Another common issue was the need for improved communications.

It is recommended that UpBEAt make routine use of customer feedback forms 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 not been the 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

By:

Activity 1 Promoting the service to businesses and customers who will pay a commercial rate/market price for the service.

Activity to promote the service has included:

- May/June 2007: Mail-outs to Neighbourhood Network organisations *see additional information*

- April – September 2007: negotiations with a Housing Association to provide a handyperson scheme *see additional information*
- April – May 2007: tendering for contract for grounds maintenance at Elite’s warehouse sites. *See additional information.*
- Autumn 2007: mail outs to local businesses to advertise the service
- Summer 2007: contact with local schools to offer to tender for grounds maintenance services

This activity resulted in:

- referrals, enquiries, customers from other Neighbourhood Network organisations *see customer figures, Table 1*
- contract with Elite for grounds maintenance at their warehouse sites
- two jobs for local churches for grounds maintenance and decorating

Challenges relating to this have been:

- the time, cost and skills needed for negotiating, pricing and putting together tenders and estimates for commercial jobs.
- the need for investment in hire or purchase of larger pieces of equipment and the need for additional training for staff in use of this equipment
- legal constraints of some kinds of contracts *see additional information*
- the practicalities (and cost) of balancing a small number of large jobs outside Bramley with a large number of small jobs in the local area.
- varying needs for staff *see additional information*

Activity 2 Maintaining a balance of customers who pay a commercial rate/market price for the service and those who receive a subsidised service

UpBEAt has provided Homes and Gardens services to members of Bramley Elderly Action at a lower cost during 2007/2008. Anyone over 60 and living in the Bramley area is eligible to become a member of BEA. Although it has not been possible to get exact figures on the number of people who paid a commercial rate/market price for the service, the figures in Table 1 give an indication. The majority of people who received a service in the Bramley Area will have paid a lower rate and all of those people living in West Leeds or elsewhere will have paid a higher rate. Table 1 shows that 32% of customers (householders) were from outside Bramley and there were also three contracts to work with local businesses/churches. This is quite a significant percentage, particularly as one of the commercial contracts was for grounds maintenance at a number of Elite’s warehouse sites.

“In the longer term, BEA will have to be more self-sufficient so the concept of UpBEAt is important”.

Comment from interview with UpBEAt board member

Summary and Learning Points

UpBEAt has made some progress towards making profit through developing commercial contracts and customers other than Bramley Elderly Action members, who would be charged a higher rate. 38 of the (approx 200) individual customers

(19%) were not BEA members and there were 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.

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

By:

Activity 1 Ensuring that UpBEAt staff are aware of the potential support needs of older people and disabled people

One member of UpBEAt staff was previously employed by Bramley Elderly Action to provide gardening services. Another was originally a volunteer with Bramley Elderly Action and worked closely with the Home Support worker. Both have received Bramley Elderly Action induction and have experience of working with BEA staff and members. The current manager of the scheme is based in Bramley Elderly Action's premises and, as the result of this and of working on the Gadgets and Aids area of operation, has gained additional experience and awareness of the potential support needs of older people and disabled people. The close relationship with Bramley Elderly Action staff means that the support needs of older people who are referred via BEA may be passed on in an informal way, although there is no documented process of induction awareness training or referrals. This could be an area for development, as a means of quality assurance in future.

Activity 2 Maintaining good working relationships between UpBEAt and Bramley Elderly Action staff

Bramley Elderly Action is a key stakeholder in UpBEAt, not only as the beneficiary of profits but also as a major provider of information, support and services to older people in Bramley. The two organisations share office space and some other resources. There are a number of positive aspects to this:

- UpBEAt staff gain an insight into the day to day work of Bramley Elderly Action and can get to know members and volunteers who call in
- BEA staff can communicate any specific needs or issues that they are aware of for members receiving the service
- Ideas and information can easily be exchanged
- BEA can use some of UpBEAt's resources when there is capacity, for example using the van and staff to help move equipment for events.
- BEA staff are available to take messages if UpBEAt staff are unavailable, or give receipts for payment if customers call into the office to pay.

"Working for older members of BEA"

UpBEAt Board member questionnaire response ('something that has given me satisfaction')

At the same time, there are resource implications to this on both sides, and this is reflected in some of the responses from BEA staff. UpBEAT and BEA are very closely linked in most people’s minds and perceptions about these links and the advantages and disadvantages of this have been explored further in the focus groups, one-to-one interviews and questionnaires to staff.

Bramley Elderly Action staff were asked to score between 1 and 5 for how strongly they agreed with the following statements. 1=disagree strongly, 2=disagree, 3=neither agree nor disagree, 4=agree, 5=agree strongly. The ticks represent the number of people who gave that score.

BEA staff responses	1	2	3	4	5	N/a
I know/recognise UpBEAT Homes & Gardens staff				✓✓	✓✓	
I know/recognise UpBEAT Board members		✓		✓✓	✓	✓
I have an understanding of what UpBEAT is trying to achieve			✓	✓	✓✓	
The relationship between UpBEAT and BEA is beneficial to BEA		✓	✓✓	✓✓	✓	
The relationship between UpBEAT and BEA is beneficial to UpBEAT			✓		✓✓	
The relationship between UpBEAT and BEA makes a positive contribution to the way I work			✓✓ ✓✓ ✓	✓		
My personal involvement with UpBEAT is appropriate to my job description and responsibilities at BEA		✓✓	✓	✓✓	✓	
UpBEAT is an efficient organisation to work with		✓✓ ✓	✓✓	✓		
I would like to see the links between BEA and UpBEAT continue			✓✓	✓✓	✓	
I would like staff at BEA to be able to make more of a contribution to the way in which UpBEAT is run	✓	✓✓	✓	✓✓		

Some comments about the relationship relate to long-term aspirations for UpBEAT and its relationship with Bramley Elderly Action:

“.....hopefully very beneficial in the long term”

[beneficial to BEA] “when it gets into profit”

“I feel that a full time worker will be needed long term”

Bramley Elderly Action Staff members

BEA staff were asked how strongly they agreed with the statement ‘The relationship between UpBEAT and BEA is beneficial to older people in Bramley’. Three out of six staff agreed strongly, 4 agreed and one neither agreed nor disagreed.

The focus group with the Bramley Elderly Action social group provided an opportunity to look at older people's perceptions of the relationship between Bramley Elderly Action and UpBEAt, as a means of exploring what the possible benefits or added value might be.

Although the majority had gardens done by family members or by people who do it in their spare time or are retired, some people did have experience of the service. Two members had used the gardening service, one the decorating service. A few had used the previously provided by BEA.

"You hope they're honest. I went to Bramley Elderly because I thought they would be reliable"

"First Checkpoint. There's an extra charge."

Bramley Elderly Action Focus Group Member

People were asked what they know about UpBEAt, and whether they felt that there were any intangible benefits in terms of quality of service. Many of the comments made related to the Parties and Gadgets area of operation, comparing prices elsewhere and delivery charges.

Several comments showed that being linked to Bramley Elderly Action adds value in terms of perceptions of trustworthiness and customer service:

"If you have a complaint, they would deal with it – and BEA would help with that because a lot of older people can't take up the cudgels. I would go to BEA"

"If they're running it as a business, they're running it as a business but if you have a problem, you can speak to BEA because you know them"

"A better service"

"A job well done"

"I reckon UpBEAt is Bramley Elderly Action – they work for Bramley Elderly Action"

Bramley Elderly Action Social Group Focus Group members

Group members were aware of some negative perceptions of UpBEAt, relating to cost and service. Nobody felt that this reflected badly on Bramley Elderly Action, however:

"Don't feel that the negative comments reflect on BEA"

Bramley Elderly Action Social Group Focus Group members

UpBEAt board members also commented on the relationship with Bramley Elderly Action:

"UpBEAt's social objectives are largely provided by BEA".

“It might be better to have one Board for both UpBEAT and BEA”.

“Both BEA and UpBEAT do make lives better”.

Comments from interviews with UpBEAT Board members

Activity 3: 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.

As Figure 4 illustrated, the majority of UpBEAT customers during this accounting period were Bramley Elderly Action members. As such they are kept informed of BEA services and receive regular review visits. There is no formal method of recording new referrals to Bramley Elderly Action membership from UpBEAT but information taken from BEA’s day book shows that there have been at least 10 new referrals via UpBEAT Homes and Gardens Service during this accounting period.

The majority of these people joined because this enabled them to receive services at a reduced rate, but information taken from their assessment forms has shown that additional services they received immediately following their assessment visit include:

- Mr B (25/5/07) referred to fire service for smoke alarm, referred for meals on wheels, information on social groups (has attended some social groups and events)
- Mr & Mrs C (11/06/07) security advice, support to Mrs C following bereavement
- Mr & Mrs D (21/06/07) information on theatre group, attendance allowance application

All the new members will receive regular newsletters, be offered annual review visits and have access to all Bramley Elderly Action services on a long-term basis.

Not all BEA staff keep detailed records about referrals to UpBEAT. The Homes and Gardens Support Worker has recorded referrals in her work reports (see additional information at the end of this document). This may be something which both BEA and UpBEAT consider keeping more detailed records on in future in order to give a better picture of the services they both deliver and the added value provided.

Referrals between UpBEAT and BEA were not recorded in detail during this accounting period and so BEA staff were asked to give an *estimate* of the frequency of referrals they made to UpBEAT. Figure 7 on the following page shows their responses:

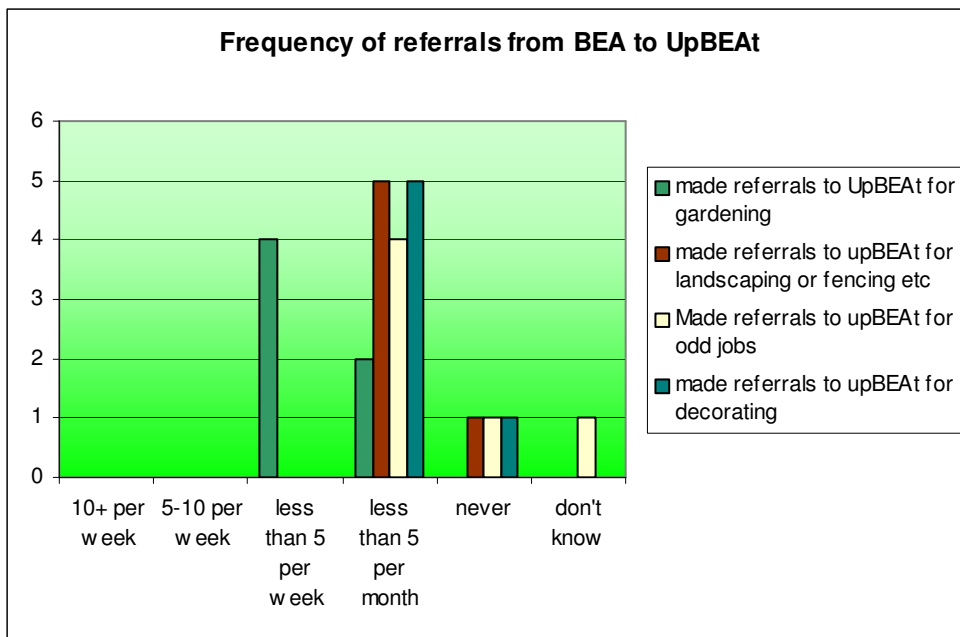


Figure 7

UpBEAT staff are encouraged to refer anyone who they have concerns about to Bramley Elderly Action so that support can be offered. This tends to happen on an informal basis and so written evidence of this is limited. Bramley Elderly Action’s day-book has one example:

"Re Mr X. Steve called and said he sounded really ill. Review visit required". The actions recorded as a result of this were - a support call, discussion of medication and of the choices regarding contacting his GP or district nurse.

“The more you go, they see the same faces, they just appreciate you”

Member of UpBEAT Homes and Gardens staff: ‘Keeping House’ DVD

Focus group members also reflected that the ongoing relationship with the gardeners was important to them. One member in particular described how important it had been in supporting her to carry on managing when caring for her husband.

Similarly, if members call at the office to pay for gardening services, this is often during drop in sessions, so that they can stay and have a drink and a chat if they choose. This can be a ‘safe’ way for people to socialise more, without necessarily committing to a group or activity.

Summary and Learning Points

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 staff benefits from close working relationships with Bramley Elderly Action staff and there have been particular advantages in that, one member

of staff was previously employed and another volunteered with Bramley Elderly Action. BEA staff have been closely involved in the planning and development of UpBEAt.

These benefits could be maximised by the sharing of specific training and learning opportunities across the two organisations in relevant aspects of ageing, social care and the vision and values of the both BEA and UpBEAt.

There have been examples where older people who have accessed the gardening service have benefitted from becoming members of Bramley Elderly Action, and of UpBEAt staff referring concerns to BEA. It would improve social accounting practice and provide valuable monitoring information for both organisations if there could be more systematic cross-referral procedures and monitoring of outcomes.

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

By:
Activity 1 Advertising vacancies locally.

The seasonal demands of most of the work led to a decision to employ Homes and Gardens staff on a casual basis at this stage, with a view to being able to offer more permanent contracts in future. Adverts were placed in the local free paper 'Bramley Advertiser' as well as with recruitment agencies *see further information* and job centres. The member of staff recruited during this year lives outside West Leeds. Of the Homes and Gardens staff already in post, two live in West Leeds and two elsewhere in the Leeds area. All but one of the members of staff appointed were unemployed or working on a casual basis immediately prior to their employment with UpBEAt.

"With this social enterprise you're working for the community, providing local employment for local people"

Member of UpBEAt Homes and Gardens staff: 'Keeping House' DVD

Activity 2 creating volunteering opportunities.

This activity has not been focussed upon within this accounting period. Recruitment, support and supervision of volunteers requires a big commitment of resources, particularly in the early stages of a volunteer programme. It is a potential source of development for the future, which would probably need to be supported by grant funding to get it properly established.

Activity 3 Accessing appropriate training and support for staff

The range of staff training has been reported on in Objective 1. Responses to the questions in the staff questionnaire on training support are shown below. The ticks indicate the number of people who gave that response. Staff changes and some re-

structuring within UpBEAt during the past year have resulted in a number of changes to staff support systems and some of the comments with regard to training and support perhaps reflect this.

Support	disagree strongly	Disagree	Neither	agree	agree strongly
My manager gives me honest feedback on my support				✓✓	✓
I am part of a supportive team			✓	✓	✓
I receive enough supervision and support from my manager	✓			✓	✓
My support and supervision is recorded and actions and recommendations are monitored and followed up	✓			✓✓	

“Regular contact with my manager. Support given. Contract provides for monthly supervision – much more infrequent but this is ok so long as there is regular contact”

UpBEAt staff member

Training	disagree strongly	Disagree	Neither	agree	agree strongly
I receive the training I need to do my job safely and professionally				✓	✓✓
I have been offered training to develop my skills and my job prospects		✓		✓	✓
I would like to be able to do further training	✓		✓	✓	






“There is training that I would benefit from but as with most small and newish businesses it always seems like we’re too busy for me to do it, plus money is always an issue”.

UpBEAt staff member

Activity 4 Working with local training providers to provide opportunities for trainees.

UpBEAt has worked with local training providers to access training for existing staff, and has explored this method of offering placements during the course of this year. However, it has not been possible to devote the necessary time to the support and supervision needed to take this further at this stage (see extracts from Board meetings in further information)

In contrast to most customers and some other stakeholders, UpBEAt directors were much more cautious about awarding high scores for how well UpBEAt’s has achieved its objectives this year. This is perhaps a reflection of the challenges of developing the business, and of having an overview of the whole operation from a management point of view.

Board members' responses to questions on how well they feel UpBEAt Homes & Gardens has achieved its objectives						D/k
To provide good value, practical services to people living in West Leeds		✓	✓✓✓	✓		
To provide the benefits to older people of knowing that the service is reliable, trustworthy, good value for money		✓	✓✓	✓	✓	
To reinvest any profits to subsidise the service to older people	✓✓✓				✓	✓
To support the service with access to BEA home support advice		✓	✓	✓	✓	✓
To create employment, support & training opportunities & where possible target these opportunities for local people	✓	✓	✓			

“not certain about level of communication between UpBEAT and BEA espec. re home support”

“No income showing to invest into BEA. Needs looking into more clearly. At present not viable”

UpBEAT Board Members

Summary and Learning Points

UpBEAT has shown commitment to providing local employment through advertising vacancies locally and 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 of the staff undertaking an NVQ in Horticulture. The creation of volunteering opportunities is an area for further development in future

7. Other views of Stakeholders

UpBEAT staff

Questionnaires were sent to everyone who had worked for UpBEAT Homes and Gardens during the past year. All three respondents had worked for UpBEAT for between 1 and 3 years. One person said that they had left to set up their own business. In addition to the responses reported elsewhere in this document, staff were also asked how strongly they agreed with some general statements about working for UpBEAT. Their responses are shown in the following tables. The ticks represent the number of people who gave that response

General	disagree strongly	Disagree	Neither	agree	agree strongly
I enjoy the work				✓✓	✓
My job is interesting				✓✓✓	
I have a clear sense of my responsibilities				✓	✓✓
My health & wellbeing at work is taken seriously			✓	✓	✓

Communication	disagree strongly	Disagree	Neither	agree	agree strongly
there is good communication within UpBEAt	✓		✓	✓	
I understand the work of other areas of UpBEAt			✓	✓	✓
My ideas and suggestions are taken seriously				✓	✓
I am involved in decisions which affect my work				✓	✓
I am proud to work for UpBEAt				✓✓	✓
Morale amongst staff at UpBEAt is generally high	✓		✓✓		

“Communication can always be improved. Communication is ok. What it needs as well as communication within UpBEAt is good communication between UpBEAt and BEA”

UpBEAt staff member

Elite staff

The partnership with the Elite Group, has undoubtedly played a major part in UpBEAt’s development and sustainability over the past few years and this has meant that Elite Group staff across the organisation have had contact with UpBEAt Homes and Gardens staff and services.

In view of this, questionnaires were sent to staff in a number of departments: finance, warehouse, maintenance and security. The responses show a good level of awareness of UpBEAt and on the whole some positive opinions of the relationship between the two organisations. The ticks represent the number of people who gave that response

Elite staff responses	yes	no	d/k
I know/recognise UpBEAt Homes & Gardens Staff	✓✓✓✓✓		
I know/recognise other staff from UpBEAt	✓✓✓✓	✓	
I know/recognise Board members from UpBEAt	✓✓	✓✓	✓
I know something about UpBEAt and the work that they do	✓✓✓✓✓		
I know something about the link between UpBEAt and Elite	✓✓✓✓✓		
I know something about the work UpBEAt does elsewhere in Leeds	✓✓✓	✓✓	
I know that profits from UpBEAt go to Bramley Elderly Action	✓✓✓✓		✓
I know something about BEA and the work it does	✓✓✓	✓	✓
Elite has helped to improve the service that UpBEAt Homes & Gardens provides	✓✓✓✓	✓	
UpBEAt has helped to improve the service that Elite provides	✓✓	✓✓✓	
UpBEAt is an efficient organisation to work with	✓✓	✓✓✓	
I would like to see the links between Elite and UpBEAt continue	✓✓✓	✓✓	
I would recommend UpBEAt Homes and Gardens to others	✓✓	✓✓	✓

UpBEAt Board

Last year’s Social Audit report made a number of recommendations about the functioning and structure of the Board – that its composition and modus operandi should be reviewed, that job descriptions for Board members be developed. This was undertaken as part of this social accounting process and from May 2008 onwards, a process of review was undertaken.

The composition of the Board during this accounting period was as follows:

Sheila Mahon – Executive Director (Co-ordinator of BEA until March 2008)

Barrie Smith – Treasurer (also Treasurer of Bramley Elderly Action)

Laura Taggart – Company Secretary

Ted Hanley – Chair (also Director of Bramley Elderly Action)

Sally McHale – Director (also Director of Bramley Elderly Action)

Ed Friel – for Elite

+ in attendance:

Stewart Firth – Elite

Sima Goldsmith – UpBEAt Business Manager

NB: the new Co-ordinator of BEA joined the board in April 2008 and has therefore been involved in the process of review.

A sub-group was set up to consider the structure and composition of the Board. This was reported to the main Board, and followed up over a period of several weeks, leading to recommendations for change in the composition.

A skills audit identified a number of key skills within the Board. These were: business, finance, management, understanding/experience of client group, legal skills, communication and group work skills, PR, vision, development and creativity.

It was also recognised, however, that the Board was dependent upon one particular member for these key skills and it was clear that there was a need to recruit new members.

The additional desirable skills which were identified were:

- `knowing people`, especially at the Local Authority / Social Services level
- practical experience, especially of running a charity shop
- writing funding proposals / bids
- presentation skills.

Since UpBEAt already had access to HR support from Elite, this was not felt to be an immediate need. Consideration was also given to the desirability of separating the role of Minutes Secretary from that of Company Secretary

Whilst it was also felt that that the Board needed someone who lives in the community with experience of building community links, the desirability of having someone from outside the immediate area, such as Bradford or Wakefield, to broaden the base for new work and give a wider perspective was also recognised.

A number of potential on-going sub-groups were proposed, all to report to the full Board on a regular basis. These groups were:

- Social accounting and financial reporting
- Business development
- The shop (future development)
- Consultancy

The intention was that the sub-groups would meet separately, then report back on their areas of interest to the full Board. The full Board would concentrate on dealing with financial matters, including three month forward planning, social accounting and also be a forum for `blue sky` thinking. It was felt that the current pattern of monthly meetings should continue, with the additional sub-group meetings convening whenever necessary.

In order to enable the Board to reflect on their past, present and future roles, all relevant extracts from previous meetings were compiled into one document. This gave a comprehensive picture of the range of issues covered and helped to focus on future needs and decisions to be taken. Sample job descriptions were also sourced from the internet and circulated to all Board members.

They sometimes go on a bit. Everyone takes an active part. Could put a time limit on questions and answers – some go on a long time. There’s a lot of repetition.”

Comment on board meetings from interview with UpBEAt Board member

Subsequent changes to the Board (after this accounting period and therefore beyond the scope of these accounts) have given further urgency to the need to augment it. The process of review and reflection afforded by the social accounting process has helped to inform this.

The questionnaires to Board members asked a range of questions about roles and responsibilities, the functioning and composition of the Board and things which they had found satisfying and frustrating.

Board members were asked how important they felt each of the following roles of the Board had been over the past year (denoted by a tick), compared to how important they felt that role *should* have been over the past year (denoted by a bullet point). A score of 1 = not very important, a score of 5 = very important.

Roles of the Board	1	2	3	4	5	n/a
To be responsible for day to day management	●	✓ ●●●●	✓	✓✓✓	✓ ●	
To decide policy issues and strategic direction			✓✓	●	✓✓✓ ●●●●●	✓
To ensure that UpBEAt works towards its stated mission, vision & values		✓✓ ●	✓	✓✓	✓ ●●●●●	
To act as advisors to the organisation			✓	✓✓✓✓ ●	✓ ●●●●●	
To give support to staff of the organisation		✓ ●	✓	✓✓ ●●●	✓ ●●	✓
Having ultimate legal responsibility for the organisation	✓ ●			✓ ●	✓✓✓ ●●●●	✓
Having ultimate responsibility for the financial management of the organisation		✓	✓	✓✓	✓✓ ●●●●●	
Other: please say what *		✓			●	

* Making money – new business

“responsibilities to be clarified”

“Board meetings dominated by financial issues and staffing. Very little opportunity for overview, strategic planning, vision!”

“Spent too much time with social audit issues, structure of Board etc and not enough time on business activities to support elderly in Bramley”

UpBEAt Board Members - questionnaires

“The Board should have an intermittent involvement in the running of the business.”

“The Board should meet monthly to review / monitor performance.”

“The full Board should not be involved in the day-to-day running of UpBEAt. The Board should be dealing with policy and strategy

Comments from interviews with UpBEAt Board members

Board members were also asked to give a score of 1 – 5 for how far they agreed with the following statements on the way the Board functions. 1 = disagree strongly, 2 = disagree, 3 = neither agree nor disagree, 4 = agree and 5 = agree strongly

The way the Board and Board meetings function	1	2	3	4	5	d/k
I receive enough information to fulfil my duties as a Board member			✓	✓✓✓✓	✓	
Papers for meetings are always circulated in good time		✓✓	✓✓	✓✓		
Minutes are circulated promptly after meetings	✓	✓✓	✓✓	✓		
The meetings are well run			✓✓✓	✓✓	✓	
The agenda covers all relevant topics			✓✓	✓✓✓	✓	
The meetings are well structured - agenda items are given the appropriate priority & time for discussion		✓	✓✓✓	✓	✓	
I find it easy to participate in the discussion at meetings		✓	✓	✓✓	✓	
The Board meets often enough to perform its duties				✓✓	✓✓✓✓	
There is clarity of roles within the Board and an appropriate distribution of roles & tasks		✓	✓	✓✓✓	✓	

“Actions not necessarily followed up on (at once or in a timely fashion)”

“Board meetings/discussions often dominated by forceful personalities. True views of Board not always expressed in full meeting”

Comments from UpBEAt Board questionnaires

Board members were asked how strongly they agreed with a number of statements about the membership.

The membership of the board has the right balance of	1	2	3	4	5	d/k
business skills & experience				✓✓✓	✓✓✓	
local skills & experience			✓	✓✓	✓✓	✓
men & women			✓	✓✓	✓✓	
ages			✓✓	✓	✓✓✓✓	
people with disabilities/sensory impairment			✓✓	✓✓	✓	
people from BME communities	✓✓	✓	✓			✓
paid staff & volunteers		✓	✓✓	✓✓		✓
the size of the board is just right	✓		✓	✓	✓	✓✓

“need another category eg knowledge/understanding of social accounting!”

“New members would be most acceptable, bringing new ideas, vision & forward thinking”
UpBEAt Board Members – comments from questionnaires

“There is a good mix on the present Board – representatives from business, the local council, members of BEA.”

“ We need directors who have additional management skills. Possibly we may have to pay them. e.g. someone taking early retirement. People miss running a business”.

“The overall number of members is fine – keep it small rather than large so that decisions can be made”.

“We need a structure of Board plus sub-groups plus reporting back procedures”.
UpBEAt Board Members – comments from interviews

Interviews with individual Board members:

Interviews were held with three members of the Board to explore some of the issues raised in questionnaires. Some of these comments have been reported in relevant sections of the report and a further flavour of the comments made is reported here.

A disadvantage of producing these social accounts almost a year retrospectively has made it difficult for people to focus specifically on the period 2007/08 and some members expressed frustrations arising from more recent developments. A more detailed report of these interviews has been given separately to the Board.

“ Management is a tough process”.

“We’re not where I think we should be. We haven’t taken opportunities when we could. The gardening could have been different – e.g. the voucher scheme”.

“We need to look at simpler ways of making money”.
Comments from interviews with UpBEAt Board members

8. Environmental Impact

The service provided by UpBEAt improves the homes and gardens of individual older people and also contributes to the improvement of neighbourhoods by keeping gardens tidy, removing rubbish, reducing older people's vulnerability to vandalism and fly tipping (by making homes and gardens look cared for).

Several of the neighbourhoods in Bramley are among the 10% most deprived in the country, with poor environmental quality being one of the specific indices of deprivation contributing to this rating. Many of the properties in these neighbourhoods have large gardens, with boundary hedges, which are difficult for people to maintain as they get older. Providing a service which enables older people to keep their gardens tidy has a number of environmental impacts:

- It improves the appearance of the area in general, increasing local pride
- It contributes to crime reduction through making older, potentially vulnerable people's homes less easily targeted
- It can mean that older people are able to stay in their homes for longer, reducing the number of void properties on estates. This reduces vandalism and maintains the viability of neighbourhoods.

At the same time, as some of the comments earlier in this report show, older people in these areas on limited incomes may find it difficult to meet the cost of paying for the service. This is especially so as larger gardens take more time and therefore cost more to maintain. This creates a challenge for UpBEAt; to be able to provide the service at a rate which is both affordable for the customer and cost-effective for UpBEAt, and also in relation to BEA its role in supporting and campaigning for older people's interests.

UpBEAt currently uses Bramley Elderly Action's Environmental policy which mainly covers office-based operations, for example:

- using recycled products, and keeping to a minimum use of resources such as stationery, printing materials, electricity and gas.
- recycling as much office waste as possible
- where possible, using products with least environmental impact
- circulating as much information as possible by e-mail and discouraging unnecessary printing out of e-mails.

The gardening service generates a great deal of green waste and UpBEAt has considered a number of options for dealing with this:

- composting in people's gardens. Most people want to have their garden waste taken away; the amount of time it would take to chop or shred waste in order to compost is not practical because the cost would have to be passed on to the customer

- bagging waste for collection by the council. Again, this would be costly in terms of time. Not all the customers would be able to organise this service for themselves, which would then increase the cost to UpBEAT and there is a limit on the number of collections which the council make per year. Using rubbish sacks is also not environmentally friendly.
- setting up a composting system. UpBEAT looked into composting garden waste at Elite's premises but legislation on the importing of waste means that this would be a major and impractical undertaking.

Currently, therefore, green waste is taken to council recycling sites. There may be other options in future if brown bins are introduced in the area. Environmental impact is further reduced by:

- transporting waste in re-usable sacks or loading directly onto a trailer
- organising jobs as close as possible together and keeping trips to a minimum in order to be time and fuel efficient
- using diesel vehicles to minimise fuel consumption
- re-using materials where possible when carrying out landscaping tasks (see examples earlier in this document)

Waste from decorating tasks is left with customers for disposal

9. Economic Impacts

a) Direct positive or negative impacts on older people:

Table 21 shows that the majority of customers feel that UpBEAT provides a value for money service, which would suggest that the Homes and Gardens service has a positive economic impact on them.

Other companies often charge very high prices for work such as cutting hedges, reflecting the high costs incurred in terms of time and waste management.

Older people are often taken advantage of by less scrupulous trades people, who see an untidy garden and anticipate that an older person will be unable to do the work for themselves and will be prepared to pay a high price for the work.

“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

This can have wider economic impacts on older people:

- If someone does not know what would be a fair price for the work they might pay more than they should in order to get the work done

- In a number of cases, trades people have taken payment in advance for work and then left without completing the task or without removing waste, with the result that the older person has to pay even more money to get the job finished
- There can sometimes be longer-term financial abuse because bogus trades people develop a relationship with the older person and offer to carry out other work at inflated prices. They come to be regarded as trustworthy and end up paying high prices for other jobs.

Whilst the responses in the questionnaires show that, overall, customers feel that the service provided by UpBEAT is value for money, a number of comments show that some older people found the cost too high or were not happy to pay double the rate for two workers, as they didn't feel that the job would necessarily be done in half the time. UpBEAT may need to explore other ways of providing a service which fits within older people's budgets and matches their perceptions of value for money in future.

b) Indirect economic impacts:

- The practical services which UpBEAT Homes and Gardens provides enable older people to stay in their homes for longer. Where people are tenants of social housing providers this helps to maintain tenancies and to promote stability in communities.
- Employment of people who were previously unemployed reduces demand on the benefits system and increases spending in the local economy.
- Homes and Gardens staff refer older people on to Bramley Elderly Action, enabling them to benefit from the work which BEA does to prevent social isolation, increase awareness of benefits and maintain independence in the community. The resulting improvements in health and independence reduce the costs to health and adult (social) services.
- Although it is not within the scope of these accounts to collect specific information relating to the number of customers who are extremely frail or have dementia or other mental health issues, it is likely that there are a number of customers who would find it hard to access regular gardening services because they require a higher level of support. Examples of this support are example, regular telephone contact, reminding people when gardeners are calling, helping to pack things away and move furniture before decorating, flexible arrangements regarding payment, which take into account older people's restricted mobility, making specific arrangements to contact carers. By providing a service which understands the needs of frail older people, UpBEAT contributes to keeping these people safe and independent in their homes for longer.

These benefits are not without costs to the organisation, however, and UpBEAT's most recent annual accounts show that the Homes and Gardens area of operation has not yet made any profits to re-invest or to subsidise a gardening service for older people. The Board acknowledged that it would take time to build the business from the outset. A number of factors have affected UpBEAT Homes and Gardens capacity over the year, and the economic impacts as a consequence:

- **Changes in supervisory staff.** The challenge of developing three areas of operation has placed high demands on staff at all levels. During the year the Board felt it necessary to make changes at a supervisory level, to have one manager for the Homes and Gardens and Gadgets and Parties areas of operations, and also taking on casual staff to cover the work load in Homes and Gardens. This change over inevitably resulted in reduced capacity for a while.
- **Poor weather for several weeks over the summer.** The gardening work is obviously very dependent upon the weather and long spells of bad weather reduced the number of gardens that could be done, whilst wages still had to be paid. UpBEAt is in the fortunate position of being able to cover some of the cost of this because staff can be re-deployed at Elite Group's warehouses for some of this time.
- **Balancing work** which is charged at a commercial rate with work for BEA members and other older people. There can often be higher costs in terms of estimates, sourcing and purchasing materials and the need for additional staff for heavy work such as paving and fencing. This has been a learning process for UpBEAt, particularly balancing demand for staff with different skills, working across a wide geographical area, the need for tools, equipment and transport

c) Benefits created through employment:

UpBEAt has provided beneficial economic impacts to the staff who have been employed over the year. This has included one full time and one part time member of staff for the whole of this accounting period, one full time and one part time member of staff for part of this accounting period and one casual member of staff for part of this accounting period

10. Compliance

- UpBEAt's HR policies are compliant with relevant employment legislation and UpBEAt currently works within Bramley Elderly Action's Equal Opportunity statement and Confidentiality, Adult Protection and Health and Safety Policies. Staff have received additional health and safety training through their work at Elite Forwarders. Staff are fully insured and UpBEAt has public liability insurance.
- Vehicles are insured and there is documentary evidence of this. Staff have received training in use of equipment in previous years but there is no system of documenting updating of training, reading instructions on new pieces of equipment or of regular maintenance of equipment.
- The responses to the questionnaires shows that on the whole customers felt that any queries or complaints were dealt with to their satisfaction. Comments from the focus group also show that a number of older people feel confident that the link with Bramley Elderly Action means that the service is trustworthy. However, UpBEAt does not give out written information on customers' rights or about complaints procedures and it is recommended that a system for this is set up
- UpBEAt is compliant with regulations on waste management. Further details of this will be supplied

- The preparation of these social accounts will enable UpBEAT to ensure compliance with the requirements of the CIC Regulator to report on performance with regard to our social aims.

11. Financial Information

UpBEAT's financial accounts for 2007-2008 are available as a separate document

12. Main issues, achievements, conclusions & recommendations

The information from the questionnaires to customers and the focus groups on the whole shows a high level of satisfaction with UpBEAT Homes and Gardens and that, from the customers' point of view, UpBEAT is achieving its social aims. Comments from the UpBEAT Board and staff and some of the comments from BEA staff highlight some frustrations and concerns, mainly with operational issues. The positive comments from the majority of people who actually receive the services 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.

1. Improved systems for tracking referrals between UpBEAT and BEA, in order to have more information about the benefits which the relationship between the two has for older people. This should include:
 - a. Data about referrals between UpBEAT and BEA
 - b. Data about exchanges of information about individuals
 - c. Data about enquiries/complaints which come via BEA staff
2. Regular formal supervision of UpBEAT staff and documentation of training needs and training provision
3. Joint training, including induction training with BEA staff so that UpBEAT's understanding of the needs of older people is updated and reinforced on a regular basis and so that all staff have a better understanding of each other's roles, responsibilities and constraints.
4. Systems for documenting
 - a. Training in and understanding of safe use of equipment, for example signing to say that instructions have been read
 - b. Maintenance of equipment

5. Customer feedback forms to be given out when work is undertaken, with clear information being given to customers about compliments/complaints procedure. Customers would then have the opportunity to pass back comments about the service *when* they receive the service and that information can be more immediately acted upon by UpBEAT.
6. Improved communication systems which take into account the needs of older people:
 - a. Response times to telephone messages (even if this is just acknowledgement of the messages)
 - b. Clear, written explanations of charging systems, complaints procedures and the options available to customers
 - c. Detailed estimates which are agreed and signed by customers
 - d. More focus groups to give older people the opportunity to discuss and contribute their opinions
 - e. Ways of feeding back to customers when their opinions have resulted in change
7. There is an urgent need to devise and agree upon a list of performance indicators for each aspect of the work of UpBEAT. These performance indicators will serve to sharpen the thinking and decision-making around the work of UpBEAT and should be given the same status and time at Board meetings as is accorded to the financial reporting.
8. Social accounting reporting should happen on a regular, on-going basis and not be confined to the annual Social Audit report. If a robust system of reporting were in place, many of the problems of time lag which we have encountered in the compilation of this report would be automatically resolved.
9. The process of collating and feeding back discussions on specific issues held in previous Board meetings proved to be a very useful and productive strategy. Its value and success is dependent on a narrative style of minute taking, which records the ebb and flow of a discussion rather than just the decisions made or action points to be followed up.

The social accounting process has also highlighted a number of potential business opportunities which UpBEAT might consider:

- a. Home support services which recognise and address the needs of:
 - i. BME elders
 - ii. People aged over 80
 - iii. Older men and women

This would need further research and the development of different marketing strategies, but UpBEAT is in an ideal position to provide quality services to a very specific market and to benefit from potential grants and partnerships around this.

- b. Increased volunteering opportunities and opportunities to offer placements and training.

This is an area which would need a big investment in time and skills and would be dependent upon suitable funding and partnership opportunities, possibly through the Local Enterprise Growth Initiative or other regeneration programmes.

13. Strengths and weaknesses of the Social Accounting process:

Strengths:

The social accounting process provides:

1. An opportunity to produce a very detailed and thorough account of the business and to gather significant data on the non-financial areas of operation. These elements can easily be pushed to one side, given the pressures of running a business.
2. A format and structure for reviewing the business and for future planning
3. A means of identifying strengths, achievements and areas for future development
4. A process of reviewing and checking against the original aims and objectives of the business
5. A significant method of reporting about the business to stakeholders.
6. A significant method for the business, as entity, to *learn*.
7. Complementary information to accompany the traditional financial audit.

Weaknesses:

1. The organisation would benefit from more immediate feedback of the issues raised, rather than waiting for the annual social accounts to be published
2. There were practical problems in collecting data and feedback on a period that could be 18 months or more in the past.
3. The process is time-consuming and onerous, particularly for a small organisation with many demands on staff time and resources.
4. Recruitment of members to serve on the panel proved problematic as it demands commitment of time and skills
5. There are difficulties around reporting different areas of operation from year to year. Some of the issues identified in one year will undoubtedly have a generic significance and relevance; others will be specific to that part of the business. There needs to be a commitment to following up recommendations from that area of operation at the same time as reporting on a different area in the following year.
6. The focus groups and questionnaires to customers did throw up some specific complaints. The blanket offer of confidentiality made it difficult to respond to these.
7. It was sometimes difficult to maintain the neutral researcher stance when some respondents expected the questioner to act as a conduit of information and opinion to the company / the Board.

Recommendations to overcome these issues:

- i) Ongoing monitoring through customer feedback forms and cross-referencing between UpBEAt and BEA
- ii) A database which would improve communication and follow-up of customers
- iii) Simplified questionnaires

14. Plans for the next social accounting cycle

The original plan was to cover one area of operation per year in the social accounting cycle, which means that the next round of accounting should cover the consultancy service offered by UpBEAt. This is a much smaller area of operation of UpBEAt, although currently the most financially lucrative. At the same time, many of the recommendations from this set of social accounts do highlight the need for ongoing monitoring, which is good practice, not only for future social accounts, but also for the business itself.

The grant from The Big Lottery Awards For All has meant that a much more in depth process of social accounting could be undertaken this year which would not be practical in future. Putting the recommendations in section 12 into place and using ongoing monitoring through customer satisfaction forms and systems of logging complaints would make the process much simpler in future.

A recommendation would be that social accounting, as a means of quality assurance, is embedded into the ongoing work of UpBEAt Homes and Gardens in the coming year and a shorter report, focussing on the areas which have been highlighted for improvement is produced next year.

Not only would this help to embed some of the principles and requirements of a Social Enterprise, but it would also serve to provide positive encouragement to the staff and Board members, endorsing their effort and vision as they work to establish practical, workable and profitable operational systems.

15. Dialogue and Disclosure

This report will be made available to all stakeholders either as a full hard-copy report, an electronic document or a summary document in hard copy or electronically. Board members and UpBEAt staff will each receive a printed copy. Bramley Elderly Action, Elite Forwarders, the Keeping House Board and the Regulator of CICs will also receive a printed copy.

The electronic version of the document will publicised and either be available to download or available electronically by request through:

- The Keeping House website
- Leeds Older People's Forum website

- The Infostore website
- The Social Accounting Network

The summary document will be distributed to Bramley Elderly Action members through Bramley Elderly Action's newsletter. Wherever possible, the summary document will also be made available to those customers from outside the BEA area who responded to the questionnaire.

Full information from the questionnaires, broken down into responses from each of the work areas is available for the social accounting panel and UpBEAt Board as an Excel document

Information which was gathered during the social accounting process, which relates to UpBEAt in general, but is not relevant to these accounts will be summarised and passed on to UpBEAt Board members.



UpBEAT Customer Survey. Please Help – you may win £25!

Our records show that in the past year you have had a **GARDENING JOB** done by UpBEAT Homes and Gardens Service. We would like to ask your opinion of the service you received. This survey will be used as part of an annual report and will help UpBEAT to monitor the work that they do, plan changes and make improvements. We would be very grateful if you could complete this survey and return it to us in the envelope provided. Your comments are anonymous, so you can be honest with us!



We're using a flowerpot scoring system for some of our questions - giving us lots of flowerpots will help us to see that you're happy with the work we did. Giving us less means we've got some improvements to make.

As a thank you for taking the time to help us, if you put the envelope that you received this letter in, in with your reply (so that we have your name and address, separate from this form) we will enter it into a draw for a £25 voucher. **Please return this form to us by 31st July.** We are happy to deal with enquiries about this form, but can only do so by post. You can use the envelope enclosed and if you send your telephone number, someone will call you back as soon as possible.

1. How did you hear about UpBEAT Homes and Gardens service?






(please tick one of the boxes)

- a) Through Bramley Elderly Action
- b) Through another Neighbourhood Network Group
- c) From a friend/relative
- d) Through Leeds City Council/Keeping House
- e) The local housing office
- f) Other (please say what)






2. When you first enquired about this service, was this by :

- | | | | |
|------------------|--------------------------|--------------------------|--------------------------|
| returning a form | <input type="checkbox"/> | telephoning UpBEAT | <input type="checkbox"/> |
| telephoning BEA | <input type="checkbox"/> | Someone enquiring for me | <input type="checkbox"/> |
| some other way | (please say how below) | | |

3. Thinking about how we dealt with your first enquiry, please give us a score, with 5 as the highest score, for how satisfied you were that:

	1 	2 	3 	4 	5 
a) Your enquiry was dealt with promptly					
b) Staff were polite and courteous					
c) Ansaphone messages were returned within reasonable time					
d) Written information (including estimates) was clear and accurate					
e) Information given over the telephone was clear and accurate					
f) The service was trustworthy and reliable					
g) Staff understood what I wanted					

4. Thinking now about the work we carried out for you, please give us a score, with 5 as the highest score, for how satisfied you were that:

	1 	2 	3 	4 	5 
a) The work was carried out within a reasonable period of time					
b) Staff were polite and courteous					
c) Staff had the knowledge and skills to carry out the work					
d) The work was carried out safely and my home was left tidy					
e) the service was trustworthy & reliable					
f) the service was value for money					
g) any queries about the work were dealt with to your satisfaction					

5. Did you have any complaints about the service you received?

Yes (go to question 6) No (go to q 7)

6. Was your complaint made to:

- a) the member of staff who carried out the work
- b) the upbeat office
- c) I did not pass my complaint on (please say why below)

7. Do you feel that your complaint was dealt with to your satisfaction?

Yes No

Please feel free to add any comments you would like to about this

8. If you have had similar work done by other trades people, could you tell us if UpBEAt's service was:

Worse About the same Better

Can you say why you feel this?

9. Would you use UpBEAt again?

Yes no

10. Would you be happy to recommend UpBEAt to others?

Yes no

11. Is there anything you would like to add about the service you received, or how we could improve it?

12. UpBEAt's values are:






VISION (being forward thinking)

INTEGRITY (being honest & trustworthy)

RESPECT (showing that we value everyone)

VITALITY (having energy and enthusiasm)

Please give us a score out of 5 for how well you feel the service you received from us reflects these values:

	1 	2 	3 	4 	5 
Vision					
Integrity					
Respect					
Vitality					

You do not have to answer the following questions, but it will be helpful to us to know:

a) Your age:

- Under 60
- 60 – 69
- 70 – 79
- 80+

b) are you: female male

c) Do you feel you have a disability? Yes no

d) How would you describe your ethnic origin? (eg British, Irish, Indian)

.....

Thank you. Don't forget to include the envelope this survey came in (or a slip of paper with your name and address on) to be entered into the prize draw

UpBEAt Social Enterprises cic. 331 Town Street, Bramley LS13 3JX

Extracts from UpBEAt Board Minutes relevant to Social Accounts

RE: OBJECTIVE 1, ACTIVITIES 2 & 3 (ADVERTISING THE SERVICE ACROSS WEST LEEDS, ESTABLISHING NETWORKS)

Jun 07:

- *A mail-out of posters and flyers has been done to several Neighbourhood Network organisations that Jason has made contact with. A response has been received from Pudsey, inviting us to talk with them, which Andy will be doing in a joint session with Sima, who will be promoting the Living Aids services.*

RE: OBJECTIVE 3, ACTIVITY 1: (COMMERCIAL CONTRACTS)

April 07:

- Re Elite & Connect contracts. AP reported that Connect had requested further information after receiving original tender. AP had sent this off and would be following it up. (Connect still considering running everything in-house.)

May 07:

- We have won the contract with Connect + the contract has been costed at a higher figure, to be staffed at supervisory level

Jun 07:

- A second meeting was held with Martyn Broadest from Connect Housing and subsequently follow-up work has been done to put more detail around the proposed contract with UpBEAt and as a result, revised costs and a job description have been provided. We are just currently waiting for Martyn to respond to the new information so that the initiative can be progressed.

Sep 07:

- *Connect* Connect have been advised that new case law has been established which indicates that if we employ someone just to work on their contract then they become liable for employment issues such as redundancy payments or any grievance claims (this would be the same for UpBEAt if Connect were to employ the staff). On consideration, the only money that upBEAt would make out of such a contract anyway would be management fees and in view of this it has been decided not to continue pursuing this contract. It was noted that this has been a very costly learning experience.

:

- Gardening: Trying to get more business contracts / identifying local businesses which have grounds that need maintenance. Sima has met with Leeds Ahead + attending networking event in January. Pushing their corporate social responsibility! Andy making links with PCT, ALOMs, LCC. Also BARCA + Sima to contact Farnell.

Jan 08:

- Sima feels that there is a lot of potential for building the gardening but this would need time to develop through making contacts with large businesses

OBJECTIVE 4, ACTIVITY 4 (CREATE EMPLOYMENT AND TRAINING OPPORTUNITIES)

April 07:

- BEST supported work placements. Can't progress this until accommodation for UpBEAt resolved. BEST needs to do H&S assessment (likely to be current BEA premises) Have had generally positive meetings so far.

May 07:

- BEST. Jason and Sima have met with a young man from BEST. Proposed to give him one week's trial to see if he can overcome his nervousness. SM pointed out that BEA was very experienced in giving support to staff

July 07:

- More casual workers to be taken on and if necessary from an agency. Brian to be used as much as possible for decorating.

Minutes from extra meeting to plan strategy for managing work:

- Additional casual staff: UpBEAt currently uses one person on casual staffing basis and the number of staff we have for casual staffing purposes needs to be increased to ensure that we maximise the earning potential in the height of the season and also deliver better customer service standards.
- Sheila had passed on details of a person that was interested in casual staff work with UpBEAt and Andy had spoken with the person to progress towards setting a date for starting work, dependent on suitability. (Since the meeting, a start date of 1 August as been agreed for xxxx, although Jason will bring him in sooner if required.)
- At the meeting it was also discussed that using employment agency staff would be an appropriate method of ensuring that we meet customer standards, providing that any agency staff should always work alongside UpBEAt staff. As a result, Andy would start to look into this.

Additional Information: evidence from BEA workers' reports on referrals to UpBEAt

Kathy Tasker (July 2007)

Home Support Visits x7 Housing Support Visits x2 Assessment Visits x2
Home Support x8 Housing Support x14 Advocacy x2 Client Support x4
Odd jobs/repairs x5 Drop-in x6 **Ref: Upbeat x6** Ref: Social Svs x1
Ref: Care & Repair x1 Meetings: Staff x2

Kathy Tasker (November 2007)

Home Support Visit x 1 Housing Support Visit x 2 Assessment Visit x 1
Winter Visits x 51 Home Support x 4 Housing Support x 12
Client Support x 8 Advocacy x 1 Odd jobs/repairs x 6 Drop-in x 8
Referral to Social Services x 1 **Referral to Upbeat x 1**
Referral to Fire Service for safety check x 1

Kathy Tasker (March 2008)

Assessment visits 2, Review Visits 1, Home Support visits 4,
Housing support visits 2, Drop in 6,
Home Support 2, Housing Support 6, Client Support 12, Odd Jobs/Repairs 3.
Ref Health Through Warmth 1, **Ref UpBEAt 1**, Staff Meeting 1,