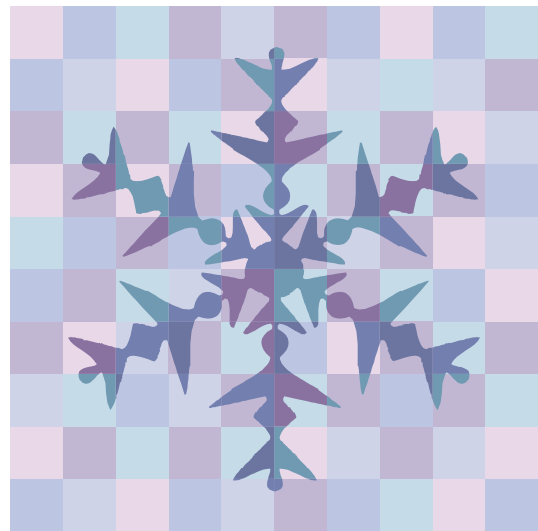




Moseley Community Development Trust

Social Accounts 2005 – 06



Moseley Community Development Trust

Social accounts 2005-06

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Why and How

Why Social Accounting?

This is the first year Social Accounting has been used by Moseley Community Development Trust. It embarked on social accounting as part of a group of social and community enterprises in the West Midlands who wanted to learn more about the process and how it could benefit their organisation. This initiative received support from the Government Office in the West Midlands - Change Up programme.

Previously, the Moseley Community Development Trust Co-ordinator had participated in a social audit panel and realised the contribution that could be made to the business planning process. In addition, the CDT wanted to be able to demonstrate to others the progress it was making towards meeting its charitable objectives. Social accounting and the Development Trusts Association Health Check were considered to be useful tools for measuring the impact and effectiveness of Moseley CDT.

How we did it?

Moseley CDT had limited resources to dedicate towards social accounting. The process was led by the CDT's Co-ordinator with support from three Trustee / Directors. The Co-ordinator and one Trustee attended workshops delivered by the Social Accounting Network (SAN) along with the other social and community enterprises from the West Midlands. The workshops ran over six months and were co-ordinated by the All Saints Action Network in Wolverhampton. All participating sent one or two people to attend each workshop. Whilst there, participants were instructed in the use of the SAN handbook and compared and contrasted each organisation's approach to social accounting. A supportive learning atmosphere was created in these workshops.

These first accounts relate to the period March 2005 to February 2006 and were written by Moseley CDT's Co-ordinator.



SCOPE of the social accounts

It was important for Moseley CDT to make this whole process manageable, since there was limited time and resources this year to commit to it. Moseley CDT also wanted to produce something useful and to avoid a complicated process that would lead to disappointing results. It was agreed that the social accounts should consider the last year's activities (March 05 to Feb 06).

In this "pilot" year Moseley CDT's Co-ordinator has led the social accounting process but has been supported by Trustees at various points on the way. This group considered the scope of the accounts and the Development Trusts Association (DTA) Health Check. After considering how to approach the accounts this year, it was clear that there was already a large body of data related to the delivery of social objectives. So, for this year, it was agreed that reporting on social objectives would form the majority of the social accounts. These objectives are listed in our charitable objectives (see page 6,7) and the ones that make a significant contribution towards improving the social fabric or help build social capital in the neighbourhood.

It was agreed that another key component of the accounts this year would be findings of the Development Trusts Association Health Check. This is a tool to help Development Trusts better understand how they are performing as a Development Trust and highlights areas of their operation that needed attention in the future.

Moseley CDT Trustees agreed that reporting on Economic and Environmental impact made by the organisation this year would be limited to a description of activity whilst highlighting areas that could be explored further in the coming years should resources allow.

Consultation with stakeholders was limited this year as well, the focus was on gathering feedback from key stakeholders and wherever possible to include the thoughts of other stakeholders. The main vehicle for gathering data was simple questionnaires that the Co-

ordinator was able to mail out to the key stakeholders. Other questionnaires were distributed through the CDT's current activities / projects.

The consultation period was limited due to the pressures of other work for the Co-ordinator and having to work to the timescale of the WM social accounting cluster schedule. This has meant the data gathered was a snap shot during the period March and April of 06. This was after the 06-07 business plan for the organisation had been written. The intention was to use the findings from the social accounts to inform the business plan. But, in this pilot year it was important to learn how to produce social accounts and then plan for them in for the coming year, in time for the writing of the 07-08 Business Plan.



About Moseley CDT

The Development Trusts approach

Development Trusts are community enterprises created to bring wealth and improvements to their neighbourhood. They are:

- community owned and led
- able to cultivate enterprise
- able to build assets
- develop community prosperity

Name: Moseley Community Development Trust (Moseley CDT)

Status: Company limited by guarantee (no. 4163271)

Registered Charity (no. 1087949)

Registered office: The Post Office Building, 149-153 Alcester Road, Moseley, Birmingham
B13 8JP. Tel 0121 449 6060

Web site: www.MoseleyCDT.com

Our purpose

To lead the sustainable regeneration of the Moseley neighbourhood.

Our vision

A creative neighbourhood valued and sustained by its diverse community.

Our values

To help guide the approach we take to our work we have identified key values.

- *To be innovative*
- *To be inclusive*

Our charitable objectives

Whilst there is a degree of overlap between all of our objectives, it was felt that those objectives marked with a * made a significant contribution to improving the social fabric of the neighbourhood. Therefore, in these social accounts were considered in more detail were called our social objectives.

1. Employment and Enterprise

1.1 to relieve unemployment in such ways as may be thought fit, including assisting people to find employment, providing employment opportunities, or providing unemployed people with work experience;

1.2 to provide or assist in providing financial assistance, technical assistance or business advice or consultancy in order to provide training and employment opportunities for unemployed people in cases of financial or other charitable need through help:-

- in setting up their own business; or
- to existing businesses;

2. Environment

2.1 to promote the conservation, protection and improvement of the physical and natural environment and access to open space;

3. Voluntary Sector *

3.1 to provide assistance and support to voluntary groups;

4. Health

4.1 to provide or assist in providing facilities, services or assistance to persons who are aged, who have mental or physical disabilities or who are chronically sick;

4.2 to promote good health and the relief of sickness;

5. Regeneration Generally

5.1 to promote for the public benefit sustainable regeneration;

5.2 to develop and encourage, foster and promote physical, economic and social development particularly in those areas which are physically economically or socially deprived and in need of or deserving of support and assistance;

6. Community Development *

6.1 to provide or improve or to assist in providing or improving community, social, recreational and leisure time facilities and in particular for those who need those facilities because of their youth, age, infirmity, disability, poverty. or social and economic circumstances;

- to promote the elimination of social exclusion and discrimination;
- to promote good community relations;
- to promote the celebration of diversity;

7. Education and Training

- to advance education;
- to provide or assist in providing and improving access to training and associated facilities;
- to advance the education of the public by the promotion of arts and culture.

Organisational structure

Moseley Community Development Trust is made up of a Board drawn from local people. There are 13 places on the Board:

- 2 appointed from the Moseley Society
- 2 appointed from the Moseley Forum
- 4 elected from the Community at the annual general meeting
- 5 co-opted for their specialist skills or knowledge

Below the Board there are a sub-groups that help manage different operational areas of the CDT. These include Trustees, staff and volunteers and are currently called:

- Property management – this group considers the day to day maintenance tasks of the building
- Financial and General Purposes – this group considers the Trusts financial performance, core administration matters and other matters that are not addressed elsewhere and affect the performance of the CDT, such as social accounting.
- Personnel and Volunteering – this group concerns itself with the ensuring the CDT has appropriate systems and procedures to ensure staff and volunteers are supported well.
- External Communications – this group was set up in response to the early findings from these social accounts. Initially, they will work with the Moseley Society and Forum to ensure a better understanding of the work of the CDT.
- The Moseley Exchange – this group is focussed on the Moseley Exchange project that is concerned with the refurbishment of the CDT building to support enterprise in the neighbourhood.

The sub groups will be able to take up the findings and recommendations from the social accounts and report back to the main Board. There is always the opportunity to form new sub groups dependent upon the needs and capacity of the Trust.

- *See the organisational diagram.*
- *See appendix for personnel involved in the organisation.*

Moseley Community Development Trust
Overview of the organisation
2005-06

MOSELEY RESIDENTS

MOSELEY SOCIETY AND CENTRAL MOSELEY NEIGHBOURHOOD FORUM

MOSELEY CDT BOARD MEMBERS
13 PLACES – 4 APPOINTED, 4 ELECTED
AND 5 CO-OPTED

SUB COMMITTEES

Finance & General Purposes, Personnel and Volunteering,
Moseley Exchange, External communications and Property

MOSELEY CDT STAFF AND VOLUNTEERS

PROJECTS

**The Post Office
Building**

Room hire and office
accommodation

**Information &
Resource
Centre**

Operated by
volunteers to support
community life in
Moseley

**Moseley Street
Wardens**

Local community
safety project

**Moseley the
creative
village**

An initiative to
support and
promote skilled
local people

**The Moseley
Exchange
project**

The refurbishment
of the Post Office
building to support
and foster
enterprise

**Community
Cohesion**

A project to
increase diversity
in community
project and to build
bridges between
communities

A brief history

In 1979 the Moseley Society was formed to “protect a unique area of Birmingham”. It is a charity and a local amenity society for the area. The Society has fought to improve and conserve the character of the area. As part of its work, the Moseley Society monitors local planning applications and is consulted about most planning applications.

In 1991, most of the small independent grocers, butchers and Tesco, all left Moseley. The City Council responded to requests for help from the Moseley Society with the production of the Moseley Action Plan. An implementation group was created alongside the Action Plan. The group contained a mix of City Council Officers and local residents; it was responsible for environmental improvements to the shopping area, in particular the “Village Green”.

The Group also took on the formation of a local neighbourhood Forum, with support from local residents associations. In 1998 the Moseley Neighbourhood Forum was born, its purpose was to be a consultative body for the City Council in Birmingham.

The Moseley Society has continued to monitor planning applications and become increasingly concerned about the increasing number of non retail uses and licensed premises in the shopping area. In response, local Councillors and the Implementation Group produced a Moseley Village Non-Retails Uses Policy in 1999. But the Society, felt increasingly powerless as major pub chains inflated property prices in the shopping centre and developers bought up the remaining office sites around the area to convert to expensive housing. Another emerging issue that was becoming apparent to the Society was the increasing difficulty young people from the Pakistani community had in finding decent employment.

At the same time, the Moseley Forum was facing problems it found difficult to resolve as a group of volunteers. The Chair of the Moseley Forum (at the time), suggested that to resolve problems faced by Moseley, a Community Development Trust would be an appropriate way forward.

In response to this suggestion a steering group was formed drawn from the Society and Forum committees. Various local experts were invited to participate in the Steering Group, these

included the Director of Moseley and District Churches Housing Association and a senior City Council officer from the economic development department, who lived in Moseley. The group felt that one of the priorities for the Development Trust should be an Information and Resource Centre in one of the empty shops. They felt it could become a meeting point where all of Moseley's residents could meet on equal terms.

In order to start the process of the setting up the Development Trust a feasibility study was commissioned and completed. After which a funding was secured for three years to employ a Development Officer, who started in September 2000 and was originally employed by Moseley and District Churches Housing Association. The Development Officer soon arranged for the Steering Group to become a Board of Directors and Trustees for Moseley Community Development Trust in 2001. In the same year, the search for empty shop began but it proved to be difficult to find premises at a reasonable rate to rent or cost to purchase. Eventually, the Development Trust was able to purchase the old Post Office Building in the centre of Moseley as it's first asset.

Area of operation

Moseley or Moseley Village as it is better known can be found 4km south of Birmingham City Centre. Moseley was once a proud village just outside of Birmingham; located on a hill, away from the smog and within easy reach of to the City Centre. More recently, there has been little investment from central or local government into the infrastructure; there are only a few public facilities in Moseley and the local economy lacks confidence, the shopping area as less than 50% retail units. In Moseley CDT's opinion, the community has become fragmented – there are islands of wealth that neighbour areas featuring in the top 10% of deprivation in the country. There is a need for more cohesion and a greater participation in community activities and a more diverse group of people involved in community life. Moseley has a wide range of community groups all working on different issues; some are linked to faiths and some to areas of interest.

2001 Population Census – Moseley

The information supplied below is based on a super output area created for the Moseley neighbourhood and is extracted from the office for national statistics.

Resident Population	22,932
Number of households	9864

Ethnic groups in Moseley	White 61.7%
	Mixed 3.3%
	Asian or Asian British 28.1%
	Black or Black British 5.5%
	Chinese or other ethnic group 1.4%

Economic activity

Employment and Qualifications	In Moseley	In Birmingham	In England
Economically active persons	63.4%	60.4%	66.9%
Employees working full time	59.9%	59.9%	61.0%
Employees working part time	12.2%	16.5%	17.7%
Self employed	14.0%	9.1%	12.4%
Fully time students (economically active)	4.1%	5.0%	3.9%
Unemployed	9.7%	9.5%	5.0%
Persons aged 16-74 with no qualifications	24.2%	37.1%	28.9%
Persons with long term limiting illness	19.7%	19.7%	17.9%

Indicies of deprivation: north Moseley.

The area known as north Moseley is of particular concern to Moseley Community Development Trust since according to Government statistics parts of it fall in to the category, most deprived 10% in England.

The 2001 census describes the population in north Moseley as follows:

The population	North Moseley	Birmingham
	7753	977,087
White	43%	70%
Mixed	4%	3%
Asian or Asian British (Pakistani	43% 32%	19% 11%)
Black or Black British	8%	6.1%
Chinese or other ethnic group	2%	1%

Economic activity

	North Moseley	Birmingham
Economically active people	40.1%	60.4%
Economically in-active people	30.5 %	39.6%
Persons with long term limiting illness	19.9%	19.7%
Unemployed	6.5%	9.5%

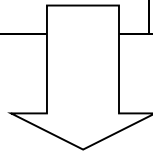
The statistics presented have been drawn from data supplied by the Birmingham City Council and the Office for National Statistics 2001 census analysis.



STAKEHOLDERS ANALYSIS

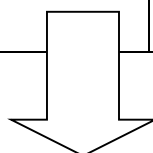
KEY STAKEHOLDERS

Moseley CDT Directors / Trustees	The Society and Forum are the “parents” of Moseley Community Development Trust. The CDT is vehicle for these community groups to address the regeneration of their neighbourhood. They are the biggest stakeholders.
Moseley Society Committee	
Moseley Forum Committee	



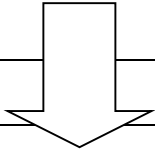
OTHER STAKEHOLDERS

Staff and volunteers	Staff and volunteers are important stakeholders in the organisation.
Moseley & District Churches Housing Association	MDCHA helped to start the CDT and its tenants should be able to benefit from the CDT's activities.
Funders	Sometimes a written report is adequate, on other occasions a more detailed report and discussions are required. In our experience, only a few funders are keen to foster a long term relationship

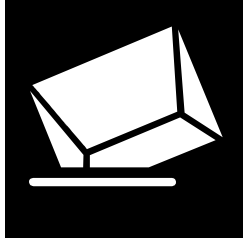


OTHER STAKEHOLDERS

Tenants	These are beneficiaries of services or projects that the CDT is responsible for.
Room hire customers	
Street Wardens supporters, Volunteers, Creative Forum members	
Other local community groups – Inter-faith Group, Moseley Festival, Moseley in Bloom, etc.	
Birmingham City Council	



Development Trusts Association	An umbrella organisation for Development Trusts. Moseley CDT contributes towards the national community enterprise movement.
Voluntary sector groups in Birmingham	Moseley Community Development Trust contributes towards voluntary sector activities within the City.
Suppliers	At present no suppliers are interested in the impact Moseley CDT is making.



Feedback from key stakeholders

Values, Objectives and Activities

Methodology

Questionnaires were used to gather data from key stakeholders and stakeholders.

Key stakeholders are: Moseley Community Development Trust Directors, Moseley Society and Moseley Forum Committee members. They were all asked about our mission, values, objectives and activities. Twenty-four questionnaires we mailed and 10 were returned. All questionnaires were on the same colour paper so it would not be possible to differentiate between key stakeholders. Unfortunately, there was mistake on the key stakeholders questionnaire; they were not able to give an overall responses to objectives 5 to 8 but they were able to comment on the activities relating to these objectives.

Stakeholders for this report were the CDT staff and volunteers. They were all given the same colour questionnaire to help preserve anonymity and promote equality. This group were asked about purpose, values and objectives. They were then asked about working for the CDT and the results for this matter can be found later in the accounts. Four of the five members of staff were given a questionnaire by the CDT Co-ordinator and the Co-ordinator did not complete a questionnaire himself. The Volunteer Co-ordinator circulated questionnaires to volunteers and its not known how many were given out.

All questionnaires were returned to the CDT Co-ordinator; below are the responses received:

Our purpose

"To lead the sustainable regeneration of the Moseley neighbourhood".

Comments received about our purpose were as follows:

- Maybe the words social and economic should be included.
- There should more emphasis on the development of resources or the full integration of the community in a vibrant prosperous locale.
- Replace the word lead with promote.
- Sustainable regeneration is a phrase we think we all understand but it needs to be explained.
- Regeneration suggests a corrective attitude but Development means advancement, enhancement and is better suited to the CDT. Also, the CDT should promote rather than lead.

Values

Key stakeholders and stakeholders were asked to place a X on the following scales to reflect their opinion about how far Moseley Community Development Trust lives up to its stated values. If they had no opinion they gave no answer. Here are their responses:

To be innovative

Key stakeholders responses	Very much					Not at all
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

Stakeholders responses	Very much					Not at all
1						
2						
3						
4						
5						
6						
7						

To be inclusive

Key stakeholders responses	Very much					Not at all
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

Stakeholders responses	Very much					Not at all
1						
2						
3						
4						
5						
6						
7						

Any Comments about Values:

- Despite our efforts we do not give an impression of inclusivity.
- The CDT needs to engage all sections of the Community.
- The CDT is not yet representative of Moseley.

Objectives

Members were asked the following:

Please score each Objective and each specific activity under the objectives on the 1-2-3-4-5 scale according to how you think the organisation has performed during the past year.

3 means OK - neither particularly successful, nor especially unsuccessful; 1 means very unsuccessful; and 5 means very successful and DK means do not know.

1. To promote the conservation, protection and improvement of the physical and natural environment and access to open space; to promote for the public benefit sustainable regeneration.

Key Stakeholders responses					
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

Stakeholders responses					
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

In particular by...

Key Stakeholders responses						
Moseley Street Wardens project						
	1	2	3	4	5	DK
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

Key Stakeholders responses						
In kind support to Moseley in Bloom						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

2. To provide assistance and support to voluntary groups and to promote the elimination of social exclusion and discrimination; to promote good community relations; to promote the celebration of diversity.

Key Stakeholders responses					
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

Stakeholders responses					
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

In particular by...

Key Stakeholders responses						
Community Cohesion project - volunteering						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

Key Stakeholders responses						
A Community venue for many local groups						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

Key Stakeholders responses						
Resource support to the Farmers' Market						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

Key Stakeholders responses						
Capacity support to Moseley Interfaith Group						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

Key Stakeholders responses						
In kind support to Moseley Festival						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

3. To relieve unemployment in such ways as may be thought fit, including assisting people to find employment, providing employment opportunities, or providing unemployed people with work experience;

Key Stakeholders responses					
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

Stakeholders responses					
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

In particular by...

Key Stakeholders responses						
Selly Oak social enterprise and procurement study						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

Key Stakeholders responses						
Room hire business – NHS job club and private enterprises						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

Key Stakeholders responses						
Moseley Arts Stalls						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

4. To provide or assist in providing financial assistance, technical assistance or business advice or consultancy in order to provide training and employment opportunities for unemployed people in cases of financial or other charitable need through help in setting up their own business, or to support existing businesses.

Key Stakeholders responses					
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

Stakeholders responses					
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

In particular by...

Key Stakeholders responses						
Moseley creative forum – guest speakers from training organisations or funding bodies.						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

Key Stakeholders responses						
Development of the Exchange project to support the growth of new business and support ones						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

5. To provide or assist in providing facilities, services or assistance to persons who are aged, who have mental or physical disabilities or who are chronically sick; to promote good health and the relief of sickness;

Key Stakeholders responses					
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

Stakeholders responses					
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

6. to promote for the public benefit sustainable regeneration; to develop and encourage, foster and promote physical, economic and social development particularly in those areas which are physically economically or socially deprived and in need of or deserving of support and assistance;

Stakeholders responses					
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

In particular by...

Key Stakeholders responses						
Co-ordination of the Moseley Regeneration Group						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

7. To provide or improve or to assist in providing or improving community, social, recreational and leisure time facilities and in particular for those who need those facilities because of their youth, age, infirmity, disability, poverty. or social and economic circumstances;

to promote the elimination of social exclusion and discrimination;

to promote good community relations;

to promote the celebration of diversity;

Stakeholders responses					
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

In particular by...

Key Stakeholders responses						
Room hire facilities at the PO Building						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

Key Stakeholders responses						
Volunteering project – supports existing and new community projects to find volunteers						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

8. To advance education;

to provide or assist in providing and improving access to training and associated facilities;

to advance the education of the public by the promotion of arts and culture;

Stakeholders responses					
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

In particular by...

Key Stakeholders responses						
Participation in the extended schools consortium.						
1	1	2	3	4	5	DK
2	1	2	3	4	5	DK
3	1	2	3	4	5	DK
4	1	2	3	4	5	DK
5	1	2	3	4	5	DK
6	1	2	3	4	5	DK
7	1	2	3	4	5	DK
8	1	2	3	4	5	DK
9	1	2	3	4	5	DK
10	1	2	3	4	5	DK

Other Objectives

Are there any other objectives that you think we should be addressing?

1. Increase the pressure for a local railway service
2. More provision for retired residents
3. A public library

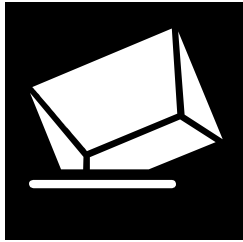
Future priorities – Key Stakeholders

In your opinion, please list what you consider our top three existing Objectives should be, 1 being the most important. Below is summary of the responses:

OBJECTIVE	Mark priority below:	Top three objectives
To promote the conservation, protection and improvement of the physical and natural environment and access to open space; to promote for the public benefit sustainable regeneration.	3,1,2,2,4,1,3	3
To provide assistance and support to voluntary groups and to promote the elimination of social exclusion and discrimination; to promote good community relations; to promote the celebration of diversity.	1,2,3,2,1,1,1,2	1
To relieve unemployment in such ways as may be thought fit, including assisting people to find employment, providing employment opportunities, or providing unemployed people with work experience.	2,5	
To provide or assist in providing financial assistance, technical assistance or business advice or consultancy in order to provide training and employment opportunities for unemployed people in cases of financial or other charitable need through help in setting up their own business, or to support existing businesses.	3,3	
To provide or assist in providing facilities, services or assistance to persons who are aged, who have mental or physical disabilities or who are chronically sick; to promote good health and the relief of sickness.	3,1	
To promote for the public benefit sustainable regeneration; to develop and encourage, foster and promote physical, economic and social development particularly in those areas which are physically economically or socially deprived and in need of or deserving of support and assistance.	1,1, 2,2,3,1	2
To provide or improve or to assist in providing or improving community, social, recreational and leisure time facilities and in particular for those who need those facilities because of their youth, age, infirmity, disability, poverty. or social and economic circumstances.	2,3,3,7,2	
To advance education; to provide or assist in providing and improving access to training and associated facilities; to advance the education of the public by the promotion of arts and culture.	6	

Findings

1. The purpose of the CDT came under some scrutiny by Key Stakeholders. It appears they would like the CDT to promote sustainable regeneration (and that phrase needs to be defined more) rather than lead it.
2. Both Key Stakeholders and Stakeholders did feel that the CDT was being innovative but it could be more inclusive.
3. It would appear that Key Stakeholders consider the CDT is performing better against its objectives than the Stakeholders.
4. The results make it clear that the key stakeholders have little or no awareness about the whole range of the CDT's activities.
5. When they were aware of an activity Key Stakeholders appeared to value it. The Moseley Street Wardens were popular and are appreciated by key stakeholders. The room hire service and Volunteer Co-ordinator were both liked as well.
6. The Key Stakeholders that responded felt that the objective most important for the CDT was: to provide assistance and support to voluntary groups and to promote the elimination of social exclusion and discrimination; to promote good community relations; to promote the celebration of diversity.
7. There is a gap in understanding about the purpose / activities of the CDT and the key-stakeholders. This is matter that needs to be addressed by the Board urgently to avoid the CDT being seen as unconnected to the community and it's parents.
8. The CDT was born out of a need identified by key-stakeholders. It would appear from the high number of "don't know" responses, communication between Key Stakeholders and the CDT is not sufficient.
9. The Board needs to consider how to better inform and engage with Key-Stakeholders and Stakeholders in the future to ensure the CDT receives full community support.



Feedback from stakeholders

Board of Directors / Trustees

Methodology

The Ten questionnaires were given out to Trustees by the Co-ordinator a Board meeting and 5 were returned to him. The questionnaire dealt with the Board members opinions on how the Board itself was performing. All questionnaires were on the same colour paper and anonymous. Below is the questionnaire with individual responses.

About the Purpose of the Board

Please indicate how important each of the following six potential roles of the Committee is. 1 is not important at all; 2 is not really important; 3 means you feel it is neither important nor not important; 4 means you think it is important; and 5 means you feel it is very important; DK means you do not know.

Responsible for day to day management

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

Deciding policy issues and strategic direction

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

Acting as advisors to the organisation

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

Giving support to staff of the organisation

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

Having ultimate legal responsibility for the organisation

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

Having ultimate responsibility for the financial good management of the organisation.

In the following and subsequent questions 1 means you completely disagree; 2 you disagree; 3 you neither agree nor disagree with the statement; 4 you agree with the statement and 5 means you completely agree. DK means you do not know.

The remit of the Committee is clear

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

About the way the Committee works...

I receive enough information about the organisation to fulfil my duties as a Committee member.

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

The papers for meetings are always circulated in good time (at least 7 days before).

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

The minutes of meetings are circulated promptly after the meeting (within 10 days).

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

The meetings are well run.

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

I find it easy to participate in the discussion at meetings.

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

The Committee meets sufficiently often to discharge its duties.

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

About the membership of the Committee...

The membership of the Committee is well balanced as regards:
local and non-local people

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

gender

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

professionals and non-professionals

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

age

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

The size of the Committee is just right.

1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK
1	2	3	4	5	DK

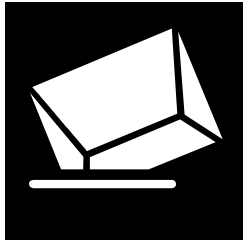
Comments:

- Meeting more often would probably be counter-productive
- We need to look actively at gender and ethnicity within the group
- More young people, more women, more ethnic minority group representation and more business representation.
- No individuals in mind but, we are aware of the need to increase diversity, gender and ethnicity.

Findings

1. This small sample suggests that the Board members are in agreement about the purpose of the Board and feel that it operates well and they have sufficient support to undertake their duties.

2. The Board members are concerned about the current make up of the Board and all agree that more diversity is required.



Feedback from stakeholders

Moseley Community Development Trust staff and volunteers were asked to complete a questionnaire anonymously, 4 staff (4 of 5 staff) and 3 volunteers completed the questionnaire. The questionnaire to staff was distributed by the CDT Co-ordinator and the Volunteers received a questionnaire from the Volunteer Co-ordinator.

Working or volunteering for Moseley Community Development Trust

The number of responses against each answer has been shown here.

1. Your role

Do you find your role interesting?	5 yes	2 partly	0 no
Has your role developed in the last year?	3 yes	1 partly	3 no
Does your job make good use of your skills?	3 yes	2 partly	2 no
Do you feel that your work is valued within the organisation?	3 yes	2 partly	2 no

1. Support

Do you feel part of a supportive team?	2 yes	3 partly	2 no
Do you get honest feedback about your performance from your line manager?	3 yes	3 partly	1 no
Do you understand all of the different roles in the organisation?	3 yes	3 partly	1 no
Do you receive sufficient opportunities for training?	4 yes	1 partly	1 no

2. Pay (for staff)

Do you consider MCDT pays you a fair wage?	3 yes	1 partly	0 no
Do you feel that other employers would pay you more?	0 yes	2 partly	2 no
Are you satisfied with your rate of pay?	3 yes	1 partly	0 no

4. Terms and conditions of employment or volunteering

Are the terms and conditions underpinning your employment reasonable and fair?	4 yes	1 partly	0 no
Do you feel able to contribute to their development?	2 yes	1 partly	2 no
Do you feel secure in your position?	2 yes	2 partly	2 no

3. Your working environment

Are you provided with the facilities to do your job well?	4 yes	1 partly	2 no
Do you work in a safe environment?	4 yes	1 partly	2 no
Do you work in a comfortable environment?	4 yes	2 partly	1 no
Are you free from bullying, harassment and discrimination at work?	5 yes	1 partly	1 no

4. Moseley Community Development Trust

Do you feel able to influence the direction of MCDT?	0 yes	3 partly	4 no
Do you consider morale to be high?	1 yes	3 partly	3 no
Do you feel MCDT is respected for its work?	3 yes	3 partly	1 no

7. Factors that affect your performance

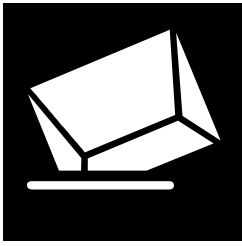
Staff and Volunteers were asked to choose five of the factors listed below and priorities them (1 being the most important and 5 the least).

Factor	Priority	Top five
An opportunity to make a difference	1,1, 2	1
Opportunity to take on a challenging role	3, 4,3	3
Opportunity to gain new skills and knowledge	2,3	2
Pay	5	
Terms and conditions of employment		
Job security	1	5
Comfortable work space		
Safety from discrimination, bullying or harassment		
Opportunities to influence the direction of MCDT's work		
Opportunities to develop or enhance your role	4,2,4	4
Support received from MCDT to carry out your role	5	
Honest feedback and appreciation your work	5	

Findings

Working or volunteering for the CDT

1. Five out of the seven said that they had an interesting role that had developed and was valued within the organisation.
2. Three felt that they were partly supported by the organisation; there was room for more support. Nearly all felt that they received sufficient training opportunities.
3. Three of the four staff felt that received a fair wage and they were satisfied with it. They were not aware of better pay elsewhere.
4. Four of the seven, felt that the terms and conditions of employment or volunteering were fair. Most didn't feel they could contribute towards changing the conditions and only a minority felt secure in their position.
5. Four of the seven respondents were satisfied with their working environment. Although one person has said that they feel bullying or harassment is an issue for them. This matter would need to be addressed further by the Personnel sub group.
6. Four of the seven staff / volunteers did not feel that they could influence the direction of the CDT and overall their morale wasn't high. But, most felt that the CDT was respected for its work.
7. The top three factors affecting the happiness and motivation of employees and volunteers were:
 - an opportunity to make a difference
 - to gain new skills and knowledge
 - an opportunity to take on a challenging role.



Feedback from stakeholders

The Moseley Street Wardens project

Background

The Street Wardens are working to make Moseley a safer and cleaner place to live. They work alongside the Police and City Council Environmental Wardens to report or resolve problems such as:

- Anti-social behaviour
- Fly-tipping
- Graffiti
- Litter
- Street Robbery
- Vehicle crime
- Domestic burglary

Moseley CDT employs two Wardens that are funded through a grant from the City Council. They have been in operation since 2002. The Moseley Street Wardens project came about in response to an array of environmental problems and residents feeling of being neglected by the authorities. At the same time Central Government introduced Neighbourhood and Street Wardens to help communities improve their neighbourhood. In Moseley, it was the CDT that took the initiative to develop a Street Warden scheme, appropriate for the area and in partnership with the City Council and Police.

It has always been difficult to measure exactly the affect the Street Wardens have on crime and environmental problems. But all involved in the partnership agree they make an important contribution and have on many occasions resolved issues themselves. One example was the problem of Street Drinkers and Begging in Moseley. Wardens have taken the lead with the Police in support over the last 2 years to almost eliminate this problem now.

The results of a survey in April 2006

Normally, the Street Wardens undertake an annual "fear of crime" survey in September, involving 100 people, answering questionnaires in the street. For this year's social accounts an interim smaller survey was conducted that involved 37 people. The Street Wardens along with "Warden supporters" – volunteers interviewed residents on a Saturday morning at the Farmers' Market in Moseley.

Results of the survey

BACKGROUND INFORMATION

1. DO YOU LIVE IN MOSELEY CURRENTLY?	
Yes	37
No	

2. DO YOU WORK IN MOSELEY CURRENTLY?	
Yes	9
No	28

3. GENDER	
Male	16
Female	21

4. HOW OLD ARE YOU?	
Under 18	1
18-25	2
26-35	3
36-45	9
46-65	12
Over 65	10

SECTION B: MAIN QUESTIONNAIRE

1. IN YOUR VIEW, WHICH ARE THE MAJOR CAUSES OF CRIME IN MOSELEY TODAY? AND WHICH <u>ONE</u> OF THE CAUSES YOU MENTIONED DO YOU THINK IS THE MAIN CAUSE	
a) Poverty	6
b) Alcohol	20
c) Drugs other than alcohol	23
d) Unemployment	19
e) Breakdown of the family	11
f) Too few resources for young people	22
g) Too few police	25

FEELING SAFE

2. HOW SAFE DO YOU FEEL WALKING ALONE AROUND MOSELEY?	
a) Very safe	11
b) Fairly safe	19
c) A bit unsafe	4
d) Very unsafe	0
e) Never walk alone around Moseley	4

3. ARE THERE ANY PARTICULAR AREAS OF MOSELEY WHERE YOU FEEL UNSAFE OR WOULD FEEL UNSAFE WALKING ALONE?	
a) Yes	18
b) No	

WORRIES ABOUT CRIME

4. HOW WORRIED ARE YOU ABOUT HAVING YOUR HOME BROKEN INTO AND SOMETHING STOLEN?	
a) Very worried	1
b) Fairly worried	13
c) Not very worried	23
d) Not at all worried	0
e) Not applicable	0

5. HOW WORRIED ARE YOU ABOUT BEING MUGGED?	
a) Very worried	0
b) Fairly worried	9
c) Not very worried	24
d) Not at all worried	1

6. HOW WORRIED ARE YOU ABOUT HAVING YOUR CAR OR BIKE STOLEN?	
a) Very worried	3
b) Fairly worried	10
c) Not very worried	15
d) Not at all worried	3
e) Not applicable	6

7. HOW WORRIED ARE YOU ABOUT BEING HARRASSED BY ANYBODY WHILE IN THE STREET OR ANOTHER PUBLIC PLACE IN MOSELEY?	
a) Very worried	2
b) Fairly worried	7
c) Not very worried	22
d) Not at all worried	6
e) Not applicable	

8. HOW WORRIED ARE YOU ABOUT HATE CRIMES SUCH AS RACIST ABUSE WHILE IN THE STREET OR AT HOME IN MOSELEY?	
a) Very worried	1
b) Fairly worried	5
c) Not very worried	21
d) Not at all worried	6
e) Not applicable	4

9. COMPARING MOSELEY CURRENTLY WITH MOSELEY TWO YEARS AGO, WOULD YOU SAY THERE IS MORE OR LESS CRIME?	
a) A lot more crime	0
b) A little more crime	3
c) About the same level of crime	9
d) A little less crime	16
e) A lot less crime	2

10. HOW MUCH OF A PROBLEM ARE PEOPLE BEGGING ON THE STREETS OR IN OTHER PUBLIC PLACES?	
a) Very big problem	1
b) Fairly big problem	5
c) Not a very big problem	27
d) Not a problem at all	3
e) Not applicable	1

11. HOW MUCH OF A PROBLEM IS RUBBISH OR LITTER LYING AROUND?	
a) Very big problem	12
b) Fairly big problem	16
c) Not a very big problem	6
d) Not a problem at all	2
e) Not applicable	1

12. HOW MUCH OF A PROBLEM IS GRAFFITI TO PROPERTY	
a) Very big problem	9
b) Fairly big problem	17
c) Not a very big problem	9
d) Not a problem at all	2

13. HOW MUCH OF A PROBLEM ARE PEOPLE BEING DRUNK AND ROWDY IN PUBLIC PLACES?	
a) Very big problem	3
b) Fairly big problem	9
c) Not a very big problem	21
d) Not a problem at all	4

14. DO YOU THINK MOSELEY STREET WARDENS HAVE MADE A DIFFERENCE?	
a) I feel safer with the Wardens about	20
b) They help keep the neighbourhood clean	25
c) They have helped reduce the nuisance from street drinkers and beggars	25
d) Do you feel there should be more Street Wardens?	16
e) I don't think Wardens have changed anything	1

15. DID YOU KNOW THAT MOSELEY STREET WARDENS ARE MANAGED BY MOSELEY COMMUNITY DEVELOPMENT TRUST?	
a) YES 28	b) NO 9

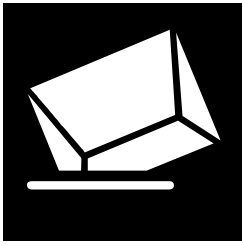
16. HOW MUCH DO YOU KNOW ABOUT MOSELEY COMMUNITY DEVELOPMENT TRUST ACTIVITIES?	
a) I'm not aware of the Trust	5
b) I only know a little about the Trust	11
c) I know about some of the activities of the Trust	12
d) I know a lot about the Trust	9

Street Warden outputs for the last year

Patrol village shopping area	367
TARGET	200
Prevent / advise new street drinkers	17
TARGET	0
Environmental problems resolved	96
TARGET	60
Environmental problems reported	1139
TARGET	200
Support Cleaner Greener community events	1
TARGET	4

Findings

1. The purpose of this survey was to understand resident's perceptions of crime and how safe they feel. Most appear not to be worried too much about crime affecting them but do think there should be more Police Officers. Almost half felt that there was a little less crime than 2 years ago and most considered the problem with street drinkers and begging wasn't a big problem. Residents are concerned about the appearance of their environment; rubbish and graffiti remain a problem for them.
2. This Project does affect the quality of life for local residents and they appear to appreciate the Street Wardens. Most understand that the CDT manages the project but the majority of people interviewed did not know much more about the CDT's other activities. Overall, the impression is that residents value this project.



Feedback from stakeholders

The Community Cohesion project

Background

This project was begun to try to increase the diversity of people involved in community life, particularly from BME groups. For many years now, the same volunteers in Moseley have organised events, groups and venues to sustain community life. These people still are very committed to community life but since they began, the local population has changed and, there isn't a simple mechanism to help new people participate in the established community groups / activities. This issue comes to sharp focus when we consider the participation of the local Pakistani residents in community life; it is very limited and there doesn't appear to be any bridges between the Pakistani community and others, in the opinion of Moseley Community Development Trust. With support from the Big Lottery Fund a Volunteer Co-ordinator was appointed to help community groups find new volunteers and vice-versa. At the same time, existing community projects required new volunteers to sustain them and grow their activities.

Volunteering was to be used as bridge between communities and was to lead to greater cohesion amongst residents. Below are some of the results from the last annual report sent to the Big Lottery Fund. At the time of writing this report there was only five months left for the project to run.

Methodology

A progress report for this project is made annually to the Funders, the Big Lottery Fund. The data included in this report has been used in the social accounts.

Findings

1. During the second year of this project October 2004 - September 2005 (includes March to September for these social accounts).

- The project had contact with 179 new beneficiaries and supported 15 new groups.
- Unfortunately the number of new participants from BME groups has remained low; approximately 15 in the last year.
- Since the project began 61 different groups have been received support or advice.

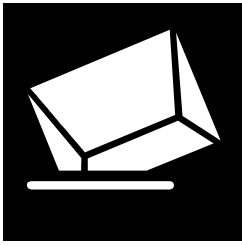
2. The project has played an important role in maintaining an active community in Moseley. The key events in community life such as Moseley Festival, Moseley in Bloom, Moseley Farmers' Market have all used the project for advice and support. These events were well attended in 2005.

3. Also, steps have been taken towards increasing diversity in community life. The project officer had been working with City Council Officers to develop support and volunteers for a Pakistani women's group.

4. The Project Officer has also been able to place a volunteer from the Disability Resource Centre with a local gardening project. In addition as part of the Moseley in Bloom project, she has supported a local group – Headway West Midlands to develop a gardening project, find funding and organise volunteers.

5. On a daily basis the Moseley Information Centre has continued to operate with the help of volunteers. They have been busy in the office dealing with enquires about local events and meetings, helping Street Wardens, helping to book rooms and distribute leaflets.

6. Overall, the project has continued to help sustain community activities, support the development of new ones and begin to involve people who do not normally participate in community activities. The number of enquiries from people with a learning difficulty was a surprise to the project. It appears there is scope to carry out more work with this group of people. Also, The work of the project has helped to make Moseley Community Development Trust better known as a community anchor organisation.



Feedback from stakeholders

Six of our permanent tenants were asked to complete a questionnaire about our office accommodation business, all six returned questionnaires. One private company who was very unlikely to respond was not sent a questionnaire.

Questions for tenants of Moseley Community Development Trust

What type of organisation are tenants?

- 6 Company limited by guarantee
- 6 Registered charities

Briefly, what does your organisation do?

- Playtrain: A training organisation for the use of the Arts in play.
- Birmingham Citizens: A community empowerment organisation.
- Circles: Provides training and support to networks of disabled people.
- Moseley & District Churches Housing Association: A Housing Association outreach project.
- Development Trusts Association: The West Midlands regional office for a national umbrella body.
- CSV Run-a-Muck: A local community composting project

Jobs and employment – the total of the six responding organisations have been shown here.

Question	Tenants response
How many people did you employ 12 months ago?	Play train 4 Citizens 2 Circles 4 DTA 1 Run-a- Muck 4 MDCHA 8
How many people do you have now?	Play train 4 Citizens 2 Circles 4

	DTA 1 Run-a- Muck 6 MDCHA 8 Total now is 25
	Numbers of employees have remained the same for all tenants except one who has increased by two in the last 12 months. Most employee 4 people and the largest numbers of employees is 8
Do you try to recruit people who live locally?	3 YES 1 NO 2 not applicable
Do you expect to increase your numbers of employees in the next year?	3 YES 3 NO
Do you expect to reduce your number of employees in the next year?	0 YES 6 NO
If you use temporary staff, do they live locally?	3 YES 2 NO 1 not applicable

As far as possible please say where your employees live

Location	Total number of tenants employees is 25
Moseley	3
Kings Heath	2
Balsall Heath	0
Birmingham	14
Elsewhere	6

The Post Office Building

How did you hear about the office space at the Post Office Building?

0 Notice Board

3 Word of mouth

0 Web site

0 Birmingham 13 magazine

3 Other, if so, how?

- My employer decided
- through contact with a Board member
- not sure, it was organised before my arrival.

Why did you choose to lease office space here?

A summary of responses:

- It was local and the only option available to us.
- Location and size of office space, the facilities provided and our connection with other organisations based at the Post Office building.
- It was a good location and the access to additional rooms.
- My employer wanted to base the office with a member of the Development Trusts Association.
- A central location, accessible by public transport and in friendly, lively neighbourhood.

How long do you think you will stay here?

2 said "indefinitely"

3 said "at least another year"

0 said "expect to leave within the next 6 months"

1 said "cannot say"

Facilities at the PO Building

Do you agree or disagree with the following statements using the 1 to 5 scale where 5 means you strongly agree and 1 means you strongly disagree. Please circle DK if you have no opinion or are not in a position to comment. Please circle your answer - *an average response has been shown here.*

the rent you pay is reasonable	1	2	3	4	5	DK
The premises are well managed	1	2	3	4	5	DK
Necessary repairs are carried out quickly	1	2	3	4	5	DK
Maintenance work is undertaken regularly	1	2	3	4	5	DK
The common areas are kept clean	1	2	3	4	5	DK
Security is not a problem	1	2	3	4	5	DK

If any of the following support services were made available, which would you make use of? Numbers of response for each service have been shown.

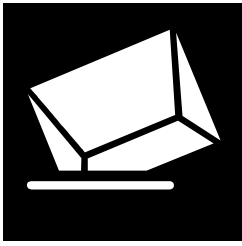
- 1 Secretarial services
- 1 Telephone or other message taking
- 1 IT support services
- 3 Fund raising research
- 3 Translation
- 4 A library of voluntary / charity sector journals
- 1 Other – please describe: better catering service

Do you have any suggestions about how the Post Office building could be better managed or improved?

- Longer opening hours for the building – 24 / 7 access.
- A meeting room for wheelchair users.
- Office cleaning for non-common areas.
- A building newsletter to share news from tenants.
- Lower charges for refreshments.

Findings - for long term tenants

1. All of the CDT's long term tenants are registered charities and the total number of employees between them is 25. Half of the tenants tried to recruit people locally and expected to increase the number of employees in the next twelve months. Nobody expected to reduce their numbers over the next twelve months. Only 3 of the 25 tenants lived in Moseley and 2 lived in nearby Kings Heath. The majority lived in other Birmingham neighbourhoods or outside of the City.
2. Most organisations appear to have discovered the office space by word of mouth. The CDT has been fortunate; it has never had to advertise the availability of office space as demand has always been greater than supply. The location of the CDT's building seems to have been the common factor in attracting tenants. Half of the tenants planned to stay for at least another 12 months and two thought they would stay for a long time.
3. All tenants agreed that the building was being managed well and the facilities provided were good. When tenants were asked about new services or improvements that could be made, the majority thought a voluntary sector library would be helpful to them. In addition, fundraising support and translations were considered to be useful services. Overall, tenants appear to be pleased with the location and facilities provided.
4. This survey has highlighted new services that could be provided to improve the quality of the office accommodation for tenants. These will have to be costed and considered in the Business Plan for the coming year.



Feedback from stakeholders

Feedback from our room hire clients at the Post Office Building

Room hire clients (individuals and groups) were asked to complete a questionnaire after their activities during April 2006; 13 questionnaires were returned and below is a summary of the responses received.

How did you find out about the rooms for hire? – *the most popular response first.*

- Word of mouth
- Good advertising
- Came to another group meeting here

Please show your answer to the following questions by marking options 1 to 5 when, 1 means poor and 5 is excellent.

The most popular score is shown here.

Was the building easy to find?					
1	1	2	3	4	5
2	1	2	3	4	5
3	1	2	3	4	5
4	1	2	3	4	5
5	1	2	3	4	5
6	1	2	3	4	5
7	1	2	3	4	5
8	1	2	3	4	5
9	1	2	3	4	5
10	1	2	3	4	5
11	1	2	3	4	5
12	1	2	3	4	5
13	1	2	3	4	5

Accessible for everyone?					
1	1	2	3	4	5
2	1	2	3	4	5
3	1	2	3	4	5
4	1	2	3	4	5
5	1	2	3	4	5
6	1	2	3	4	5
7	1	2	3	4	5
8	1	2	3	4	5
9	1	2	3	4	5
10	1	2	3	4	5
11	1	2	3	4	5
12	1	2	3	4	5
13	1	2	3	4	5

Was the room clean and tidy					
1	1	2	3	4	5
2	1	2	3	4	5
3	1	2	3	4	5
4	1	2	3	4	5
5	1	2	3	4	5
6	1	2	3	4	5
7	1	2	3	4	5
8	1	2	3	4	5
9	1	2	3	4	5
10	1	2	3	4	5
11	1	2	3	4	5
12	1	2	3	4	5
13	1	2	3	4	5

Suitable for your needs					
1	1	2	3	4	5
2	1	2	3	4	5
3	1	2	3	4	5
4	1	2	3	4	5
5	1	2	3	4	5
6	1	2	3	4	5
7	1	2	3	4	5
8	1	2	3	4	5
9	1	2	3	4	5
10	1	2	3	4	5
11	1	2	3	4	5
12	1	2	3	4	5
13	1	2	3	4	5

Set up as requested					
1	1	2	3	4	5
2	1	2	3	4	5
3	1	2	3	4	5
4	1	2	3	4	5
5	1	2	3	4	5
6	1	2	3	4	5
7	1	2	3	4	5
8	1	2	3	4	5
9	1	2	3	4	5
10	1	2	3	4	5
11	1	2	3	4	5
12	1	2	3	4	5
13	1	2	3	4	5

Accessible for everyone					
1	1	2	3	4	5
2	1	2	3	4	5
3	1	2	3	4	5
4	1	2	3	4	5
5	1	2	3	4	5
6	1	2	3	4	5
7	1	2	3	4	5
8	1	2	3	4	5
9	1	2	3	4	5
10	1	2	3	4	5
11	1	2	3	4	5
12	1	2	3	4	5
13	1	2	3	4	5

Did the CDT carry out all requests					
1	1	2	3	4	5
2	1	2	3	4	5
3	1	2	3	4	5
4	1	2	3	4	5
5	1	2	3	4	5
6	1	2	3	4	5
7	1	2	3	4	5
8	1	2	3	4	5
9	1	2	3	4	5
10	1	2	3	4	5
11	1	2	3	4	5
12	1	2	3	4	5
13	1	2	3	4	5

Provide equipment as requested					
1	1	2	3	4	5
2	1	2	3	4	5
3	1	2	3	4	5
4	1	2	3	4	5
5	1	2	3	4	5
6	1	2	3	4	5
7	1	2	3	4	5
8	1	2	3	4	5
9	1	2	3	4	5
10	1	2	3	4	5
11	1	2	3	4	5
12	1	2	3	4	5
13	1	2	3	4	5

Provide refreshments as requested					
1	1	2	3	4	5
2	1	2	3	4	5
3	1	2	3	4	5
4	1	2	3	4	5
5	1	2	3	4	5
6	1	2	3	4	5
7	1	2	3	4	5
8	1	2	3	4	5
9	1	2	3	4	5
10	1	2	3	4	5
11	1	2	3	4	5
12	1	2	3	4	5
13	1	2	3	4	5

Any other comments

- Only the ground floor is accessible for everybody
- A lift is needed
- The stairs are difficult for meetings on the 2nd floor
- More audio visual equipment would be helpful
- The building could be warmer

About Moseley Community Development Trust

Did you know the purpose of Moseley CDT before you hired a room?

10 of the 13 people asked did not know about the purpose of the CDT.

Did you know that hiring a room at the CDT supports the local economy?

8 of the 13 people asked did not know this.

Do you or your guests use local shops? If so, which ones?

9 of the people asked did use the local shops, such as:

- The Chemists
- Post Office
- Pubs/Cafes

Findings

This was a small sample taken over a short timescale. Therefore, we feel the results can only give us an impression and much more investigation is required with users of the building.

1. Most of the users surveyed appear to find the room hire service to be delivered well and met their expectations.
2. Most users found out about our service by word of mouth. When taking in to account that most are pleased with the service provided, it is a good sign for the CDT that new business is arriving through personal recommendations.
3. The matter of accessibility is a concern to all users. Many commented that a lift was needed and that more needed to be done for elderly people.
4. Most users were unaware of the purpose of the CDT and how the room hire activity supports the local daytime economy. But, it was useful to receive confirmation that users of the building did not only spend money with us but went on to spend money in local shops. The measurement of this activity should be considered in more detail under the economic impact of the social accounts when resources will allow.

DTA Health Check 05-06. Summary of findings and actions

The CDT Co-ordinator, Chairman, Treasurer and one other Trustee considered the DTA Health Check on behalf of the organisation. The above is summary of this groups discussions. The Health Check is a self-assessment tool designed by the Development Trusts Association to support it members. Moseley Community Development Trust felt that is was making good progress towards to reaching all of the standards set in the Health Check. We consider that we have met about half of all Health Check criteria. It is our intention to continue to use this tool to help Moseley Community Development Trust become an effective Development Trust. You can see the whole Health Check results in the Appendix.

ü fully met ? partly met X not met

Governance	Met	ACTION BY /COMMENTS
1. The Trust has a clear and agreed mission, aims and definition of its target beneficiaries.	ü	Review annually
2. The board ensures the Trust meets legal and financial obligations.	ü	Financial &General Purposes group (F&GP) review
3. The board has indemnity insurance, as appropriate.	ü	F&GP group review
4. The organisation plans for the succession of key staff and board members.	?	Personnel and Volunteering Group to consider further
5. Management continuously review performance and plan improvements.	?	F&GP group to consider further
6. The Trust has a business plan including financial forecasts.	ü	F&GP group manages this.
7. The board regularly reviews how effective it is and how it works as a team.	X	Chairman - appoint a Vice chair Questionnaire and an away day to discuss communication

Finance		
1. All income and expenditure is clearly accounted for.	ü	F&GP group reports Audit procedure Consider additional Finance staff
2. There is a system of checks and balances to avoid misuse of funds.	?	F&GP to consider this further plus the annual Audit is in place
3. The Trust has an agreed budget for the year; income and expenditure are regularly reviewed against this.	ü	F&GP to update after business plan finalised
4. The Trust has sufficient resources to deliver the current level of service.	ü	F&GP to monitor
5. The Trust meets requirements for dealing with Inland Revenue, VAT, PAYE and pensions.	ü	F&GP – organise VAT review
6. The Trust has written financial procedures for bookkeeping, expenses, petty cash etc.	?	Current procedures informal F&GP need to progress
7. Financial risk assessment is regularly undertaken (at least annually).	ü	F&GP should present to the Board alongside the Budget and Business plan
8. The Trust undertakes an annual review of financial procedures and processes.	ü	F&GP Group

Human Resources		
1. The Trust meets legal requirements for equal opportunities, health and safety and disability discrimination.	?	Personnel and Volunteering to update with new volunteer this year.
2. Legal requirements regarding individual staff and volunteers are met.	ü	Personnel and Volunteering to update with new volunteer this year. Otherwise OK.
3. Staff and volunteers have clearly defined roles and responsibilities.	ü	JD's issued
4. The Trust takes measures for retaining and training staff.	ü	Training opps always offered
5. The Trust has a clear line management structure.	ü	Combination of Co-ordinator and Trustee

6. The Trust has a policy for managing poor performance.	ü	Supervision meetings
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Economic performance

Moseley Community Development Trust through its operations is making an impact on the daytime economy in Moseley through:

- The employment of local people
- Tenants that employ local people
- Provision of office and retail space in the centre of Moseley
- Provision of room hire services to groups from the public, private and community sector, they all attract visitors to the local shopping area.

Current indicators of economic impact are simplistic and only indicative of Moseley CDT's impact on the area. There is a need to develop tools to that can measure effectively the impact the PO building is having on the daytime economy in Moseley. Moseley CDT began to think about how to measure its economic impact with the University of Central England (UCE), below is a summary (produced by Charlotte Carey from UCE) of the progress made to date.

Issue	Action	Indicator	Method	Indirect benefits
Creating local employability (Internal)	Volunteers gain: Work experience, Increased employability, Increased skills Skills	Number of volunteers moving through to employment (locally) Skills retained locally	Tracking volunteers from leaving. Telephone contact 6/12 month history collected one call.	Value of volunteers recognised
	Expertise and skills they add to organisation	Actual monetary value of volunteers (professional rate)	Volunteer Audit: apply monetary value to value of skills/expertise. E.g if a solicitor volunteers and offers legal advice – what's the real cost of that advice?	
	CDT employees	Number of employees Local multiplier effect	New economics Foundation - LM3	
Creating local employability (External) The local multiplier effect Inward investment Effects on local economy through tenant and activity and room hire	Use of local facilities e.g Post office, shops, cafes By staff, volunteers and tenants	More people employed in shops/cafes Increased staffing and working hours derived.	Survey users to determine use of local facilities. This is measurable over time. Potential to devise a methodology for measuring the impact, for future audit.	Positive impact on daytime economy
	Use of local facilities e.g Post office, shops, cafes	More people employed in shops/cafes Increased staffing and working hours derived.	Survey tenants	As above
	Business benefit from being based at Moseley CDT	Increased funding and employees	As above	Increased local employment

Moseley the Creative Village

This impact of this activity has not been measured. So these accounts will simply record the activities that have been taking place.

Background

Moseley has always been known a place where people who are involved in the Arts have gathered, collaborated and begun new enterprises. Over the last two years Moseley CDT has explored this impression of the neighbourhood to clarify if it was a myth or reality. Early studies demonstrated that it was a reality. Through public meetings, email questionnaires and workshops it became clear that Moseley supported a creative cluster that was being ignored by

statutory agencies involved in regeneration or the growth of the creative industries. Moseley Community Development Trust set about trying to develop infrastructure to support the growth of new creative businesses as well as trying to retain them in the neighbourhood. Over the last year Moseley CDT has been involved in supporting the creative industries under the banner “made in moseley” in the following ways.

Moseley Creative Forum

This is an informal networking event organised to bring together people in the sector. They have the chance to hear from guest speakers, find out about new resources, start new collaborations, showcase work and find inspiration. The event is organised quarterly, it’s small and informal and appreciated by those Arts agencies that attend as well as the local “creatives”.

Moseley Arts stalls

Once a month, alongside the Farmers’ Market, Moseley CDT provides an opportunity for local designer-makers, artists and crafts-people to sell their products. It provides a simple first step for many people who want to test the market without taking on much risk. In the last year around 50 stalls would have been leased by Moseley CDT to creatives.

Moseley “Creatives” Directory.

This is an initiative (supported by the Arts Council England) to help promote Moseley as a creative centre where a large variety of talented people can be found. The Directory will be distributed amongst some residents but will also be used to promote Moseley as a creative village across the UK to potential buyers; to date around 40 entries have been requested.

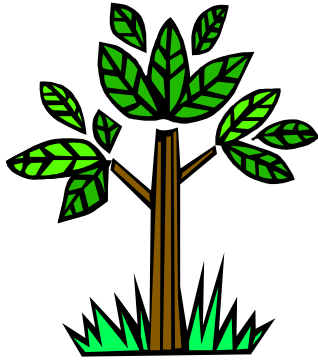
The Moseley Exchange project.

To really foster the growth of new business and support new people to enter the creative industries sector the CDT has been considering how to provide quality space for the many self-employed and home workers in the neighbourhood. Over the last year, the CDT has been able to build on research that clarified the type of creative cluster that exists in Moseley and the range of support it requires. Outline proposals have been developed with Architects and funding secured to employ a part time Development Officer. Moseley CDT anticipates the development of its current building will lead a substantial growth in daytime economic activity in Moseley as well as the birth of new businesses.

Moseley CDT financial performance for 05-06

This is an extract from our annual review document

	2006	2005
INCOME		
Rental Income	42616	39377
Room Hire	24024	14136
Fundraising, Donations & Gifts	2581	2142
Bank Interest Receivable	5712	2243
Grants Receivable	158497	134511
Professional Services	1380	1291
TOTAL INCOME	234810	193700
EXPENDITURE		
Payroll Costs	109011	130200
Building Costs	43632	29786
Office Costs	39926	38691
Audit and Governance Costs	5800	5384
Depreciation	11788	13020
TOTAL EXPENDITURE	210157	217081
Net Surplus/Deficit	24653	-23381



Environmental performance

1. Moseley Community Development Trust has taken small steps towards to making all of its operation “green” this is mainly due to financial constraints upon the organisation. But, we can describe some practices that help reduce our environmental impact.
2. Most staff live nearby and some cycle and walk to and from the Post Office building. Staff are encouraged to use public transport for business meeting as well. Fortunately, the building is well served by public transport and this often used by visitors.
3. Within the operation of the building Moseley CDT does recycle paper, card, glass and aluminium and has purchased cleaning materials that are labelled environmentally friendly whenever possible. In addition, this year secondary glazing was installed in to the some of the offices on the second floor to help reduce heat loss from the building. Within the office recycled and reclaimed paper is used and a water meter is installed to help monitor consumption.
4. MCDT has tried to use gas and electricity as efficiently as possible, consumption is monitored regularly to help understand consumption over the year. Also the Boiler is serviced regularly to ensure it operates efficiently. The PO building contains the old school radiators for heating. The CDT has decided to retain these to save on new resources and they continue to function well.
5. Another measure taken by the organisation to save on energy consumption has been the reduction in the use electric kettles. Instead the CDT supplies hot and water for making drinks via single dispenser unit that does not need to be constantly switched on and off for hot water.

6. Whilst there is not a formal purchasing policy in place yet the organisation does prefer to use local suppliers or those who are working in the social enterprise field.
7. Its main impact on the wider community is through the Moseley Street Wardens project. The Wardens help improve the quality of the environment.
8. It has supported other local initiatives that help improve the environment such as:
 - Moseley in Bloom
 - Run-a-Muck - community composting
 - Moseley Farmers' Market



Summary findings & recommendations

Below are listed the objectives that the CDT has progressed during 2005-06, these are followed with reflections and recommendations for Board members to consider.

Social

Objectives

- *to provide assistance and support to voluntary groups;*
- *to provide or improve or to assist in providing or improving community, social, recreational and leisure time facilities and in particular for those who need those facilities because of their youth, age, infirmity, disability, poverty. or social and economic circumstances;*
- *to promote the elimination of social exclusion and discrimination;*
- *to promote good community relations;*
- *to promote the celebration of diversity;*

Moseley CDT has progressed these objectives through

- The provision of meeting rooms in Moseley
- The Community Cohesion project – volunteering for community life
- Support to the Moseley inter-faith network, Moseley Festival, Moseley in Bloom and Moseley Farmers' Market.

1. Overall, the CDT has been able to make good progress towards meeting these objectives. It has used its building to develop a base for community groups to find resources and support for their activities. Unfortunately, the CDT has not been able to reach all parts of the community it serves. There remains an important task of providing services that are relevant to minority groups and those at the margins of the community. This is in no doubt due to the CDT's capacity and not due

to a lack of motivation to engage with these groups. Within these social accounts it has not been possible to gather feedback from all of the people who have benefited from the CDT's services and facilities and this will have to be improved upon in the next set of accounts.

2. It was interesting to see that the key stakeholders did consider that support for the voluntary sector should be the main priority for the CDT. Also, they commented on the need to be more inclusive. At the same time, CDT Board members were concerned about the lack of diversity amongst the Board members.

3. The matter of greatest concern for the CDT is the lack of awareness of the CDT's activities amongst key stakeholders. Even though the parents of the CDT are the two main stakeholders it would appear the membership of the Moseley Forum and Moseley Society do not know enough about the CDT's objectives, activities or purpose.

Economic

Objectives

- *to provide or assist in providing financial assistance, technical assistance or business advice or consultancy in order to provide training and employment opportunities for unemployed people in cases of financial or other charitable need through help:-*
- *in setting up their own business; or*
- *to existing businesses;*

1. From the preliminary investigations made by Moseley CDT and the discussions with UCE it would appear the CDT's activities are having a positive impact on the daytime economy in Moseley, through its tenants and room hire activities. Unfortunately within this set of accounts it has not been possible to measure that impact only to suggest how it could be investigated in future accounts.

2. The CDT's work around the development of a creative cluster is a medium term initiative to increase economic activity in the neighbourhood. The beneficiaries of the creative forum, arts

stalls, creatives directory and eventually the Exchange project all need to be recorded to help demonstrate another economic impact the CDT is making.

Regeneration Generally

- *to promote for the public benefit sustainable regeneration;*
- *to develop and encourage, foster and promote physical, economic and social development particularly in those areas which are physically economically or socially deprived and in need of or deserving of support and assistance;*

1. Moseley suffers from a perception that there is no need for regeneration activities. But, through the Moseley Regeneration Group (that the CDT co-ordinates) community groups and City Council Officers, have been able to collaborate and or co-ordinated their efforts. The group has been able to raise the profile of the neighbourhood with the City Council and provide a forum for discussion with decision makers and private developers who impact on Moseley's future direction. It has not attracted significant new resources, although it is able introduce concepts involved in sustainable regeneration in this forum.

Environment

Objectives

- *to promote the conservation, protection and improvement of the physical and natural environment and access to open space;*

1. Moseley Street Wardens has been the main vehicle for progressing this object. The responses received indicate that the project is valued and appreciated by residents.


Development Trusts Association Health Check

1. This was a useful exercise for the Trustees of the CDT. It highlighted the good financial progress the CDT was making with regard to generating independent income but also highlighted the need to diversify grant income. Overall, the Trustees felt the CDT was about half way to meeting all of


the criteria listed in the Health Check. This self-assessment tool has helped highlight issues that needed to be considered in the writing of the Business Plan.

Recommendations for the CDT Board


1

 The Board should set a side time to consider this first set of Social Accounts and Auditors report. In addition, a Board member should become responsible for the social accounting cycle within the organisation.


2

 The Board should consider how to find additional resources to sustain the cycle of social accounting reporting. At the same time ensure that accounts are prepared in time to inform the writing of the 2007-08 Business Plan.


3

 The Board should circulate copies of the social accounts and Auditor's report to all key stakeholder groups and invite feedback. A copy should be placed on the CDT web site as well and next year a report should be made at the annual general meeting.

4

 The Personnel Sub group should consider the results of the staff and volunteers questionnaires and seek to resolve any outstanding issues.

5

 It seems Moseley CDT needs to work harder to raise awareness about its purpose and develop new services that affect the minority and disadvantaged people in the neighbourhood. Health was one objective that has not been progressed; this could provide an opportunity for the CDT to reach further in to the community with help from Moseley and District Churches Housing Association maybe. To do this the Board will need to increase its capacity.

6

 The CDT should find additional resource to help map, monitor and measure its economic impact.

7



The profile of the regeneration group needs to be raised with decision makers at the City Council, particularly those in the regeneration and planning departments as well as the Hall Green District Office.

8



Moseley Street Wardens project should be expanded to deliver more services. The Board should consider how to develop stronger working partnerships with statutory bodies and Moseley and District Churches Housing Association.

9



The Board should seek to attain Level 2 of the Development Trusts Association Health Check in the next year.



What do we already do?

Using the SAN template, below is a summary of current activities with regard to recording our progress and achievements.

1. Core foundation information: Do you have...		Comments
A clear, concise mission statement?	ü	Agreed by the Board
Clearly stated and agreed values which underpin the way your organisation works?	ü	Agreed by the Board
Clear objectives which express the social, environmental and economic purpose of your organisation?	ü	Charitable objectives
A way of linking what is done day by day (your activities) to the objectives?	ü	Annual report document
An understanding of all the Stakeholders whom you affect and who can affect you?	ü	See stakeholder list
2. Documentation / Record-keeping: Do you have...		Comments
Accurate and full records of work done or services provided - What? Who? How? Where?	ü	Projects supported by Grants have indicators Included.
Countable information and data - How many? How much? When?	ü	Projects supported by Grants have indicators Included.
Agreed indicators for aspects of your work?	ü	Projects only
Annual performance targets?	ü	Projects and Financial targets
Feedback/evaluation forms from trainees, clients, people you work with, etc.	X	
Detailed employee/volunteer records	ü	
Record of training for: employees/volunteers/directors/ members	ü	None for directors
Regular employee reviews/appraisals	ü	Staff supervision meeting
Employee time-sheets	X	
Anecdotal feedback on quality recorded in writing	ü	Letters of thanks are retained
Minutes of meetings	ü	
Agreements with other stakeholders - partner organisations, funders, etc.	ü	Not with stakeholders but All projects do.
One off project or service evaluations	X	

Internal or external reports to funders or other stakeholders	ü	Funders mainly
3. Stakeholder Consultation		
Do you do regular and systematic consultation <u>using a questionnaire</u> with:		Comment or details
		Details
- Employees	x	To be considered (tbc)
- Volunteers	ü	
- Customers/clients/trainees/beneficiaries	x	tbc
- Board/management committee members	ü	
- Funders	x	
- Partner organisations	x	tbc
- Community groups/community members	ü	tbc
- Wider community/general public	ü	AGM
Other forms of regular and systematic consultation with:		Details
- Employees	ü	Weekly staff meeting
- Volunteers	ü	Via Volunteer Co-ordinator
- Customers/clients/trainees/beneficiaries	X	
- Board/management committee members	ü	Board meetings
- Funders	X	
- Partner organisations	X	
- Community groups/community members	X	
- Wider community/general public	Xü	Done partially through the Street Wardens project and room hire feedback.
4. Use of and compliance with other quality assurance or external standards		
		Comment
Health and safety policy and procedures	ü	Health and Safety Policies reviewed annually
Equal opportunities policy and procedures	ü	Written policy in place
Investors In People	X	
Employment of disabled people (standards)	X	
PQASSO	ü	This was started with support from the local CVS but CDT found it difficult to use and the support faded away. The CDT felt the DTA health check was a more appropriate tool eventually.

Development Trusts Health-check	ü	Completed this year
Key Social & Co-operative Performance Indicators	X	
Social Firms Performance Dashboard	X	
5. Reporting on social, environmental and economic performance		
Publish report on social, environmental and economic performance	ü	Will publish first set of accounts this year. Copy to be placed on web site for download.
Include a section in the annual report	X	tbc
Give a verbal report at the AGM	X	
Circulate a newsletter with details to the community or to stakeholders	X	
Write and publish relevant case-studies	X	
Write internal reports on social, environmental and economic performance	X	
Set annual targets for social, environmental and economic performance	X	
Reports on social, environmental and economic performance to funders or other stakeholders	X	
Other forms of relevant reporting?		
6. Discussion about social, environmental and economic performance		
Regular agenda item at Board/Management Committee meetings	X	tbc
Regular discussion by Management team	ü	
Regular discussion by/with employees/volunteers	X	tbc
Regular discussion/consultation/focus groups with:		Details
- Customers/clients/trainees/other beneficiaries	X	
- Partner organisations	X	tbc
- Community groups	X	
- Funders	X	
- Wider community/general public	X	

The CDT does not feel the entire checklist is relevant to it but it has been able to identify activities that it wants to consider in the future. With regard to compliance with statutory regulations; Moseley Community Development Trust meets its obligations with Companies House and the Charities Commission annually. In addition, the CDT ensures it

follows good practice for the management in the voluntary / community sector, health and safety regulations, employment law, and the implementation of the recent Disability Discrimination Act.

The people involved

The Board members for 05-06

Elected members

Paul Shevlin

Steve Harding - Chairman

David Rutter - Treasurer

Appointed members

Fiona Adams – Moseley Society

Robert Orme - Moseley Society

Austin Barber – Moseley Forum

Joss Kennordrie – Moseley Forum

Co-opted members

Andrew Matheson – resigned in Feb 06

Terry Slater

John Sharpe

Staff

CDT Co-ordinator – Tony Thapar

Centre Manager – Matthew Colleran

Volunteer Co-ordinator – Naomi Hawkins

Moseley Street Warden – Graham Flint

Moseley Street Warden – Kim Monaghan

Contract staff

Cath Ralph – Exchange Development Officer

Building Maintenance - Mick Boylan

Finance Officer - Jonathan Keelan

Saturday Caretaker - Mahmood Ahmed

Cleaning – Marienette Saraiza

Cleaning – Rubia Da Silva

Regular Volunteers

Ted Blagburn – building management and farmers' market

Chris Verrall – building management and farmers' market

Terry Lovell - building management and farmers' market

Sally Billingham – volunteer directory updates

Rosemary Turner – month in moseley

Jonathan Smith – CDT webmaster

DTA Health Check 05-06. Summary of findings and actions

The CDT Co-ordinator, Chairman, Treasurer and one other Trustee considered the DTA Health Check on behalf of the organisation. The above is summary of this groups discussions. The Health Check is a self-assessment tool designed by the Development Trusts Association to support it members. Moseley Community Development Trust felt that is was making good progress towards to reaching all of the standards set in the Health Check. We consider that we have met about half of all Health Check criteria. It is our intention to continue to use this tool to help Moseley Community Development Trust become an effective Development Trust.

ü fully met ? partly met X not met

Governance	Met	ACTION BY /COMMENTS
1. The Trust has a clear and agreed mission, aims and definition of its target beneficiaries.	ü	Review annually
2. The board ensures the Trust meets legal and financial obligations.	ü	Financial & General Purposes group (F&GP) review
3. The board has indemnity insurance, as appropriate.	ü	F&GP group review
4. The organisation plans for the succession of key staff and board members.	?	Personnel and Volunteering Group to consider further
5. Management continuously review performance and plan improvements.	?	F&GP group to consider further
6. The Trust has a business plan including financial forecasts.	ü	F&GP group manages this.
7. The board regularly reviews how effective it is and how it works as a team.	X	Chairman - appoint a Vice chair Questionnaire and an away day to discuss communication
Finance		
1. All income and expenditure is clearly accounted for.	ü	F&GP group reports Audit procedure Consider additional Finance staff
2. There is a system of checks and balances to avoid misuse of funds.	?	F&GP to consider this further plus the annual Audit is in place

3. The Trust has an agreed budget for the year; income and expenditure are regularly reviewed against this.	ü	F&GP to update after business plan finalised
4. The Trust has sufficient resources to deliver the current level of service.	ü	F&GP to monitor
5. The Trust meets requirements for dealing with Inland Revenue, VAT, PAYE and pensions.	ü	F&GP – organise VAT review
6. The Trust has written financial procedures for bookkeeping, expenses, petty cash etc.	?	Current procedures informal F&GP need to progress
7. Financial risk assessment is regularly undertaken (at least annually).	ü	F&GP should present to the Board alongside the Budget and Business plan
8. The Trust undertakes an annual review of financial procedures and processes.	ü	F&GP Group
Human Resources		
1. The Trust meets legal requirements for equal opportunities, health and safety and disability discrimination.	?	Personnel and Volunteering to update with new volunteer this year.
2. Legal requirements regarding individual staff and volunteers are met.	ü	Personnel and Volunteering to update with new volunteer this year. Otherwise OK.
3. Staff and volunteers have clearly defined roles and responsibilities.	ü	JD's issued
4. The Trust takes measures for retaining and training staff.	ü	Training opps always offered
5. The Trust has a clear line management structure.	ü	Combination of Co-ordinator and Trustee
6. The Trust has a policy for managing poor performance.	ü	Supervision meetings

**SECTION 1: ENGAGED IN ECONOMIC, SOCIAL AND ENVIRONMENTAL REGENERATION OF A DEFINED AREA OR COMMUNITY
'LEVEL 1'**

Indicator	Fully Met	Mainly Met	Partly Met	Not Met	Response
1) The objectives of the Trust were defined through community consultation/ mapping exercise/ evidence of need	ü				No further action required by MCDT
2) The objectives and activities of the Trust cover social aims	ü				
3) The objectives and activities of the Trust cover economic aims	ü				
4) The objectives and activities of the Trust cover environmental aims	ü				
5) The memorandum & articles of association or constitution of the Trust defines the boundary of its area of benefit .	ü				

SUMMARY – achieved level 1

**SECTION 1: ENGAGED IN ECONOMIC, SOCIAL AND ENVIRONMENTAL REGENERATION OF A DEFINED AREA OR COMMUNITY
'LEVEL 2'**

Indicator	Fully Met	Mainly Met	Partly Met	Not Met	Response
1) The objectives of the Trust are reviewed every 1-3 years with involvement from the community and other stakeholders			*		Social accounting will require consultation with Moseley Society and Moseley Forum, using questionnaires; both key stakeholders. This should become an annual feature, using the AGM
2) The Trust measures progress and reviews performance through monitoring, delivery of outputs and key statistics			*		Projects progress are measured due to grant aid conditions. Overall performance should begin to be picked up in the social accounts. Resources for social accounts need to be made available.
3) The board and staff are aware of the defined community and actively consult with all of its parts.			*		Suggest discussion at a Board meeting or away day.
4) The range and scope of the activities of the Trust demonstrate coverage of the defined area of benefit .			*		MCDT does not reach all of the area of benefit yet. Also not all of the objectives are being progressed – health, employment / training. New resources need to be found to progress objectives and reach of MCDT.

SUMMARY – Partly met the criteria for level two status – aim to fully meet all criteria in 06-07.

**SECTION 1: ENGAGED IN ECONOMIC, SOCIAL AND ENVIRONMENTAL REGENERATION OF A DEFINED AREA OR COMMUNITY
'LEVEL 3'**

Indicator	Fully Met	Mainly Met	Partly Met	Not Met	Response
1) The objectives of the Trust are broadly shared by its community			*		Need to raise awareness about our objectives – promote the web site and a clearer annual review document. Put social accounts and review on the website.
2) The community is clear about how to influence the direction of the Trust			*		As above
3) There is regular two way communication with the community in a variety of forms			*		Monthly Board meetings – report back from the Forum and Society could become agenda items. Invite MDCHA to join the Board again.
4) Market research is used by the Trust to inform the development of new services			*		Maintain social accounts processes. Continue with room hire feedback forms. Continue with Moseley creative forum meetings.
5) The Trust is clear about its role in making social, economic and environmental changes and can define its part in the whole picture of local delivery			*		Discussion with the Board. Survey partners, stakeholders about our role through social accounting. Continue to manage the regeneration group.
6) The Trust can measure its impact on its area of benefit				*	Continue with social accounting – more resources required though to survey.
7) The Trust has a clear identity that is recognised by its stakeholders .			*		Need to survey more

SUMMARY – Only partly met level 3. More work needed in consultation with stakeholders and the community.

**SECTION 2: INDEPENDENT AND AIMING FOR FINANCIAL SUSTAINABILITY / NOT FOR PRIVATE PROFIT
'LEVEL 1'**

Indicator	Fully Met	Mainly Met	Partly Met	Not Met	Response
1) The Trust plans to generate an operating surplus in each financial year		*			Complete the business plan and a fundraising plan
2) The Trust can demonstrate that any surpluses generated by the Trust and any trading subsidiary are used solely for community/ public benefit	ü				Audit process
3) The finances of the Trust are being pro-actively managed	ü				F&GP
4) The Trust can demonstrate that it is 'needs led' and not funder-driven		*			Complete social accounts
5) The Trust has earned income of up to 10% of running costs	ü				Audit
6) No one funder is contributing more that 50% of running costs			*		Progress fund-raising
7) There is evidence that the Trust is pursuing a financial sustainability plan			*		F&GP to develop a strategy and milestones.
8) There are skills related to financial management in the staff team and board .		*			Finance Officer required for 2 to 3 days/week.

SUMMARY - Mainly met all criteria for level 1, complete all gaps in 06-07 and achieve level 1.

**SECTION 2: INDEPENDENT AND AIMING FOR FINANCIAL SUSTAINABILITY / NOT FOR PRIVATE PROFIT
'LEVEL 2'**

Indicator	Fully Met	Mainly Met	Partly Met	Not Met	Response
1) The Trust has a specific plan to achieve financial sustainability within 5-10 years				*	F&GP to develop a strategy
2) Funding sources are diversified. - no one funder is contributing more than 25% of running costs				*	Fundraising strategy to be developed
3) The Trust can demonstrate that its main sources of income are secured into the future				*	F&GP to consider all income and its security as part of a financial risk assessment annually.
4) The Trust has a policy for accumulating an appropriate level of reserves on its balance sheet		*			F&GP to review reserves policy annually.
5) The Trust has earned income of between 10% and 25% of running costs	ü				Audit and management accounts will help F&GP understand the unrestricted funds and core running costs.
6) The Trust has begun building up an asset base	ü				PO building

SUMMARY – Only partly met level 2 criteria. More resource needed to maintain and progress the Trusts financial future planning and analysis.

**SECTION 2: INDEPENDENT AND AIMING FOR FINANCIAL SUSTAINABILITY / NOT FOR PRIVATE PROFIT
'LEVEL 3'**

Indicator	Fully Met	Mainly Met	Partly Met	Not Met	Response
1) The Trust has earned income of over 25% of running costs	ü				
2) The Trust has secured substantial assets in relation to its turnover (e.g. exceeds value of typical annual Trust turnover , as a minimum).	ü				
3) The Trust is clear about profit or loss on each specific aspect of business		*			TT to complete MCDT Business plan MC to develop a business plan for room hire
4) The Trust is accumulating an appropriate level of reserves on its balance sheet	ü				
5) The business structure and M&A of the Trust optimise financial performance			*		F&GP to review
6) The Trust employs staff with specific responsibility for fundraising / asset development.				*	Need to employ finance officer for more hours

SUMMARY – 50% of the criteria are being met but MCDT needs to complete level 2 first.

**SECTION 3: COMMUNITY BASED, OWNED AND MANAGED
'LEVEL 1'**

Indicator	Fully Met	Mainly Met	Partly Met	Not Met	Response
1) The Trust keeps the community informed of its activities		*			Improve web site and promotional material. Use AGM Translations required.
2) There is a clear point of contact for the Trust	ü				
3) There is a majority community membership of the board	ü				
4) The process of election to the board is transparent		*			Publicise standing orders and elections in advance of the AGM.
5) The board meets at least four times a year with agenda and minutes	ü				
6) The board has mechanisms in place to scrutinise the finances	ü				
7) Individual members of the board understand their role in decision making and the information presented to them	ü				
8) The board ensures that its legal and financial obligations are met	ü				

SUMMARY – On the whole MCDT has achieved level 1, but should complete gaps in 06-07.

**SECTION 3: COMMUNITY BASED, OWNED AND MANAGED
'LEVEL 2'**

Indicator	Fully Met	Mainly Met	Partly Met	Not Met	Response
1) The Trust welcomes input from the community			*		Board membership should reflect community. Otherwise need to use the web site for more interaction. Community can join sub groups as well, need to promote skills required more. Management of expectation is a problem.
2) The Trust acts upon input from the community			*		Not always appropriate to. Welcome suggestions though.
3) The community is directly involved in the election of the board			*		4 community places available at the AGM. 4 are appointed from the Society and Forum. Both involve local people, need more a diverse group though. Board members need to be involved in finding new members.
4) The board sets the vision and the objectives of the organisation		*			With support from staff – need to review annually as part of the social accounts.
5) The board makes all policy decisions		*			More discussion at sub group level, recommendations put to the Board for approval. Discuss with the Board members.

SUMMARY – Making good progress to fully meeting all level 2 criteria – complete in 06-07.

**SECTION 3: COMMUNITY BASED, OWNED AND MANAGED
'LEVEL 3'**

Indicator	Fully Met	Mainly Met	Partly Met	Not Met	Response
1) People in the community know about the Trust			*		Need to survey the community more – social accounting
2) People in the community feel ownership of the Trust				*	Board members should – need to survey them and the community.
3) The Trust proactively seeks to involve new people on the board			*		Board members need to be ambassadors and seek appropriate new people out. Discussion with Board members.
4) The board has prepared for the succession of senior staff				*	Personnel and Volunteering sub group need to draw up proposals with the Co-ordinator
5) The board has prepared for the succession of board members and officers			*		Board members need to review annually skills required and induction for new members.

SUMMARY - Only partly met level 3 criteria. Board members need to take leadership in some of these areas.

**SECTION 4: ACTIVELY INVOLVED IN PARTNERSHIPS BETWEEN THE COMMUNITY, VOLUNTARY, PRIVATE AND PUBLIC SECTORS
'LEVEL 1'**

Indicator	Fully Met	Mainly Met	Partly Met	Not Met	Response
1) The Trust has information about the relevant contacts in local agencies.	ü				
2) Information on services/ activities is exchanged with relevant organisations	ü				
3) The Trust is a member of relevant local networks	ü				

SUMMARY – MCDT has achieved level 1

**SECTION 4: ACTIVELY INVOLVED IN PARTNERSHIPS BETWEEN THE COMMUNITY, VOLUNTARY, PRIVATE AND PUBLIC SECTORS
'LEVEL 2'**

Indicator	Fully Met	Mainly Met	Partly Met	Not Met	Response
1. The Trust works jointly with local agencies on service delivery.		*			MCDT needs better links with the PCT, Schools, Colleges, social care and City Councils planning and regeneration services.
2. Users are referred to and from other local agencies (as appropriate).		*			Links with other voluntary sector groups need to be sustained and improved – via the information centre
3. Events are held in partnership with other organisations (as appropriate).		*			Only on a project by project basis.
4. The board and staff have a clear understanding of the benefits and aims of networking.			*		Need to survey them
5. The Trust both instigates and participates in partnerships.		*			Regeneration Group is a good example. Other social care forums need to be developed.
6. Partners are represented in a variety of ways throughout the Trust (e.g. board , Working Groups).		*			Community partners are represented but not statutory or private sector. Reliant on a few Board members though.

SUMMARY - MCDT is making good progress towards level. More resource is required to foster new partnerships though.

**SECTION 4: ACTIVELY INVOLVED IN PARTNERSHIPS BETWEEN THE COMMUNITY, VOLUNTARY, PRIVATE AND PUBLIC SECTORS
'LEVEL 3'**

Indicator	Fully Met	Mainly Met	Partly Met	Not Met	Response
1. The Trust actively engages with other organisations on a local, regional and national level as appropriate.			*		Co-ordinator regional chair of the DTA.
2. The Trust has an active presence on key strategic planning and partnership bodies, such as local strategic partnerships (LSP's).			*		A couple of Board members are able to participate in these structures.
3. Networking and partnerships are reviewed for effectiveness.			*		Social accounts should include this matter.

SUMMARY – Currently, capacity is limited to achieve level 3. MCDT requires more active volunteers, Board members or staff to become involved in the many groups involved in regeneration work.