



Social Reporting for CT

Social Reporting for Community Transport Organisations

**A DIY Kit for Reporting on your
Social, Economic and Environmental Performance and
Impact**



SAN and CTA UK would like to acknowledge the assistance of all those who contributed to the social audit clusters in Ireland, Scotland and England during 2006-9.

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This Kit has been prepared for use by Community Transport (CT) organisations. The approach is based on a trial social accounting process during 2006-9 with the committees, staff, volunteers, transport operators and service users of community transport organisations in the Republic of Ireland, Northern Ireland, Scotland and England. The kit can be used to assist CT organisations in preparing a report on their social, economic or environmental performance and impact, as training material or as an information booklet.

The content of this Kit includes

- a brief outline of social accounting
- the process (and templates to assist)
- sample surveys for stakeholder consultation
- key aspects reporting form
- verification check list.

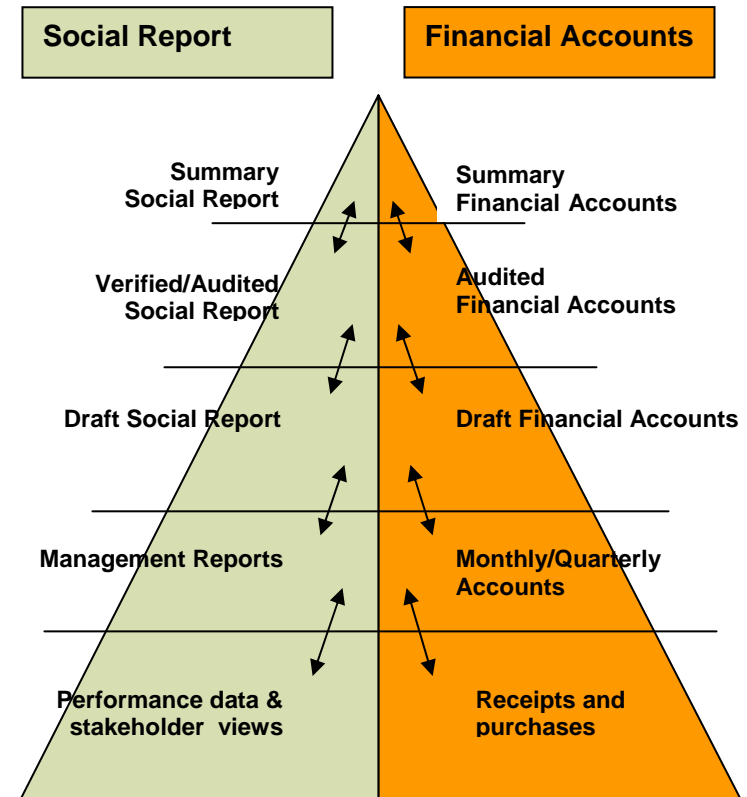
Social Reporting

Social Reporting is a flexible framework that enables your organisation...

- to review what it is doing and why
- to report on its performance and the benefits for your community
- to provide the information essential for planning future action and improving performance.

Through this process you will understand the impact your organisation has on all the people you work with. At the same time you will be able to build in accountability by engaging with your organisation's key stakeholders. The main benefits to your organisation are you will be able to **prove** the value of your organisation and **improve** its performance.

You will be familiar with the process under which Financial Accounts bring together information on the financial performance of your organisation, which is presented to an independent auditor for verification. Similarly, Social Accounts bring together information on the social, economic and environmental impact of your organisation and can be presented to an independent audit panel for verification. Together, these sets of account form a pyramid of evidence that may be fed back to interested parties in the form of Summary Reports.



Source: adapted from Social Accounting & Audit, The Manual (John Pearce & Alan Kay, 2005)

Verification

The Social Audit Network recommends that social reports are verified by an independent panel – usually a ‘social audit panel’, to ensure that the social report is comprehensive and transparent. As with financial accounting, some smaller organisations may feel that a lighter touch is more relevant to their organisation. Accordingly this social reporting kit contains a verification checklist for self-completion. The Checklist may then stand alone, or be verified by an independent third party. The Social Audit Network can provide further options for verification and/or a list of trained social auditors (www.socialauditnetwork.org.uk) .

Three Steps to Social Reporting & Verification

Step 1: Planning

- Agree the organisational objectives that will form the framework for the social report
- Identify the key stakeholders
- Agree the indicators for performance/impact and collect and collate data
- Identify an appropriate verification process

Step 2: Consultation

- Plan and conduct consultation with stakeholders, including Board members and staff, passengers, service providers (local operators and volunteer drivers), community groups and local agencies

Step 3: Report & Verification

- Prepare a Social Report
- Undertake the agreed verification process (if appropriate appoint a social auditor & panel members)
- Share (widely) the findings of the verified Social Report

Step One — Planning

The Social Reporting Plan will create a framework for the social report that reflects the values and objectives of the Community Transport organisation and the views of its stakeholders.

The following should be discussed by the Board/Management Committee:

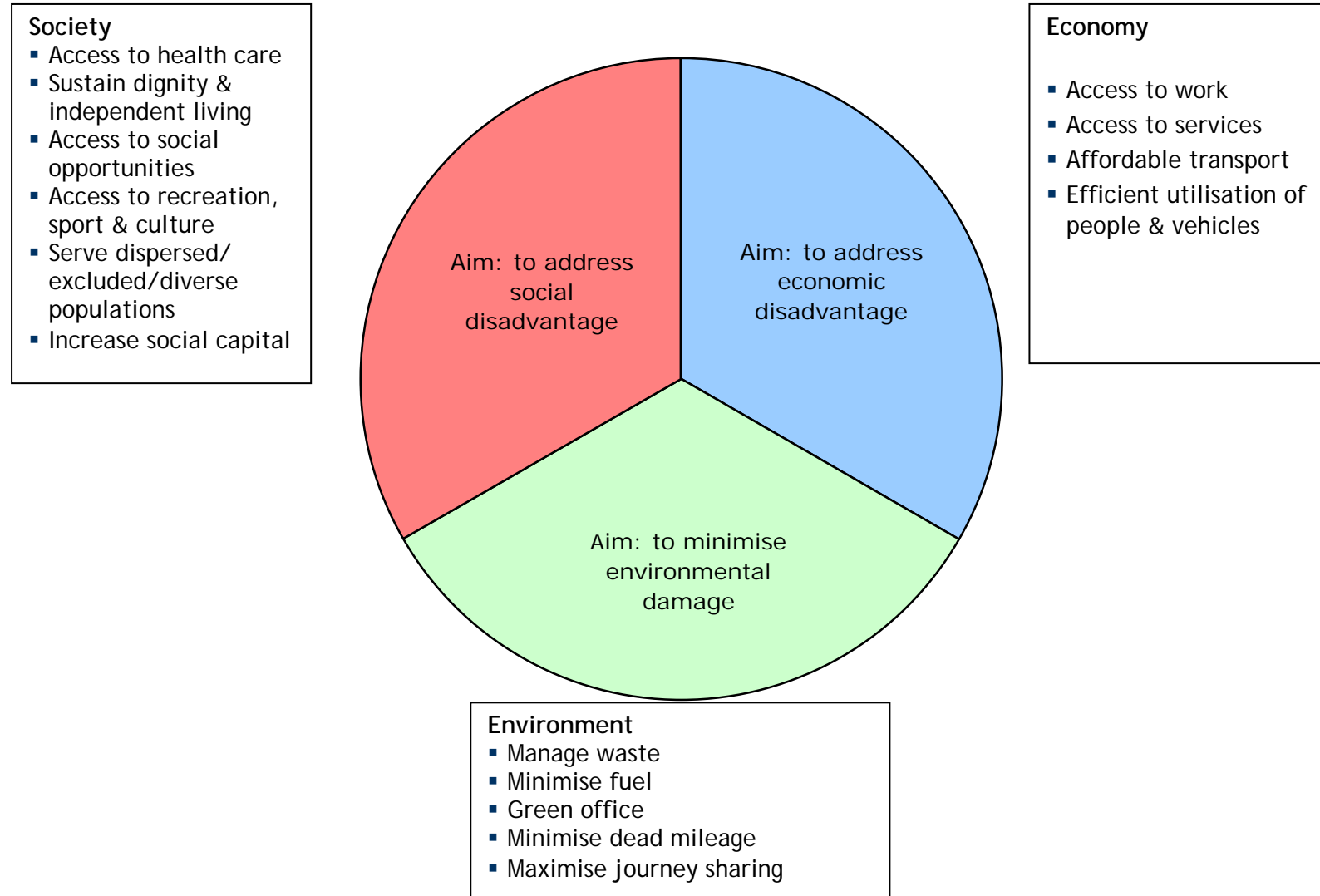
1. Identify the values, aims (mission) and objectives of the organisation (see page 7 for examples)
2. Prioritise the objectives
3. Identify the strategies (activities) for meeting each of the organisation's objectives
4. Identify key stakeholders (see page 8 for examples)

The following tasks may assist:

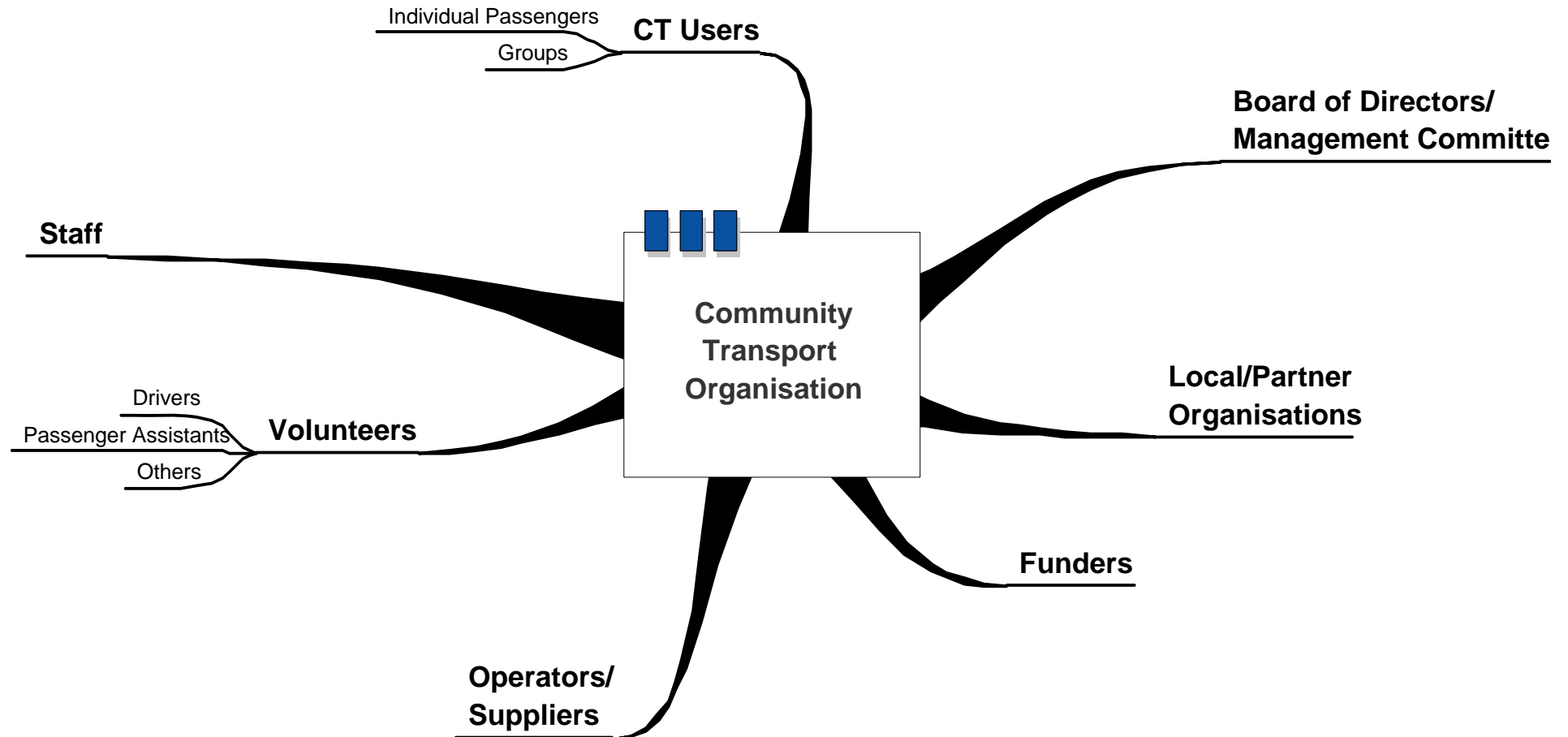
- Review the aims and objectives set out in the organisation's business plan, operational plan and constitution or funding proposals
- Identify everything that you do (strategies/activities) and cluster into objectives
- Undertake a SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats)
- Undertake a Stakeholder mapping exercise to identify key Stakeholders.

This work may benefit sometimes by being facilitated by an independent person.

Aims & Objectives: Typical aims and objectives of Community Transport organisations might include:



Stakeholders: A mindmap can be a useful way of identifying key stakeholder groups for Community Transport organisations and are likely to include those shown below. Additional groups or subgroups can be added to reflect your organisation.



Performance Data And Indicators

Social reporting links your performance to your aims and objectives. Performance **data** such as the number of trips taking passengers to health appointments are a direct way of measuring how far your organisation achieves its objective of providing 'access to healthcare'. However, objectives such as 'supporting independent living' or 'providing accessible and affordable transport' are more difficult. For these more difficult to measure areas, it is common to use '**indicators**' that are not a direct measure, but do indicate change and what people think or feel.

Data is a direct measure and comes from a range of sources including:

Data Sources	Example
<ul style="list-style-type: none"> ▪ Organisational records 	Number of trips; number of passengers with a disability
<ul style="list-style-type: none"> ▪ Survey information 	Number of passengers who rely exclusively on CT for access health appointments; Number of passengers who are 'not satisfied/satisfied/very satisfied with the service'
<ul style="list-style-type: none"> ▪ Other organisations 	Number of referrals by other organisations

Indicators are indirect measures that tell you whether you are making progress toward achieving your aims and objectives. An indicator may be made up of a number of data items, such as averages/rolling averages that indicate performance over time. All indicators should be:

Indicator Requirements	Example
<ul style="list-style-type: none"> ▪ Meaningful & Significant 	An indicator must tell you something about what you are trying to achieve. E.g. If you are aiming to 'increase accessibility' the number of new services accessed by CT passengers would be both meaningful and significant.
<ul style="list-style-type: none"> ▪ Measurable 	An indicator must be able to show change, through numbers or level of satisfaction. E.g. If you are aiming to provide 'affordable transport', survey questions that offer standard responses such as

1 Social Reporting - Planning

	'too high/OK/too low' are measurable, compared with asking open questions such as 'what do you think of the fares?'
▪ Easy to understand	If an indicator is too complex it may be ignored, or misunderstood.
▪ Comparable	You can only compare 'like with like'. E.g. If you are aiming to compare the range of services accessed by CT passengers with national statistics for bus users you need to monitor the same categories of services.

Social reporting may not require you to collect information over and above the information you already gather. First look at the data that you already use to check or report on the progress of your Community Transport organisation. Use the *What Do We Already Do?* checklist at Appendix 1 to identify the information you may already be gathering.

Typically, organisations collect information on vehicles, trips and passengers that tell them a lot about how much work they are doing or how efficient they are. Check that the definition that you use for each measure is widely understood and recognised. To avoid confusion about terms like 'journey', 'trip' or 'operating costs', set out the definitions that you use within your survey questionnaires and reports.

An indicator tree can be a useful way of planning how you intend to measure progress against your aims and objectives. Overleaf is an example that demonstrates how one organisational objective is linked to indicators and data. You should complete an indicator tree for each organisational objective. You will find a template at Appendix 2.

When you have completed your indicator tree, you can check back against the *'What Do We Already Do?'* form to see if you will need to start collecting any new or different information.

Mission/Aim	Objective	Indicator	Data Required	Sources
To address social disadvantage	Improved access to services	Average number of trips per passenger	Number of passengers who travelled with CTO	Internal booking records
		Average number of trips per service, per passenger	Journey destinations/purpose	Compare with national/regional statistics for average trips by bus
		% passengers who have no other means of accessing services	Number of passengers who have/have no alternative means of transport	Stakeholder survey
		% of passengers who have a disability	Number of passengers with/without disability	Internal records
		Accessibility of CT	Passenger views	Stakeholder survey
		% transport requests met	Number of transport requests received	Internal records
			Number of trips completed	

Step Two – Stakeholder Consultation

A vital part of the social audit process is engaging stakeholders in the process. This ensures that you have a clear understanding of the impact your organisation has on the individuals and organisations affected by your work and strengthens your accountability.

The main stakeholder groups on which community transport operators have an impact are:

- Community transport passengers/users
- Staff (paid and unpaid)
- Volunteer drivers/other volunteers
- Community groups and local agencies
- Operators/Suppliers
- Board of Directors/Management Committee members
- Funders and contractors of the service

Surveys are not the only way to engage stakeholders. However they are particularly useful in providing information about individual views and experiences. Some sample survey forms are given in Appendices 3-8. These surveys can be modified to meet your own objectives and data requirements. Ideas about other ways of gathering information are also covered in the sections below.

Survey of Staff

This provides the Board/Management Committee with an idea of the staff's perspective regarding the service. The survey form can be completed anonymously to provide the staff with a sense of ease when completing the form. However, it can also be useful to cover certain aspects of the survey as a group discussion, which can be recorded on a flip-chart at the time or in the form of meeting notes.

A sample survey for staff, whether paid or unpaid, is in Appendix 3.

Survey of Passengers/Service Users

Passenger views on their transport needs and preferences, or on their experience of your services can be obtained through on-bus questionnaires/interviews, by telephone survey or in a forum or discussion group. You may wish to establish a panel of service users who are willing to contribute their views on a regular basis or establish a system of follow-up phone calls to a percentage of clients. Views are generally recorded anonymously, although you may wish to offer the opportunity to follow up any specific complaints that are made during interviews.

Questions for a survey of individual passengers are given in Appendix 4a and a version for group users in 4b.

Survey of Community Groups and Local Agencies

Key personnel in other local community organisations and agencies, including funders and contractors, will have views in regard to the performance of your organisation in meeting its own objectives and those of others.

The impact that community transport has on the ability of other local organisations and agencies to carry out their own activities may be a crucial aspect to this survey, and questions about value for money may be directed at funders and contractors.

This can be carried out as a telephone or postal/email survey.

A sample survey for community groups and agencies is contained in Appendix 5

Survey of Volunteer Drivers

A satisfaction survey for volunteer drivers is a useful way of recording their views on the standard of service delivered and their relationship with the community transport organisation.

This survey can be carried out as part of a discussion group meeting, but is more suited to an individual interview, either face to face or by telephone.

Sample questions for this survey are contained in Appendix 6.

Survey of Operators and Suppliers

A satisfaction survey can be used to record the views of operators and suppliers under contract to the community transport organisation.

Sample questions for this survey are given in Appendix 7.

Board/Management Committee

Members of the Board will have views on the performance of the organisation that should be included in the social report that brings together the various performance data with the results of surveys and discussion groups.

A set of evaluation questions for Board/Management Committee members is given in Appendix 8.

Step 3 – Report & Verification

The Board/Management Committee should review the social accounts as they develop, bringing together a final report that summarises all the information that has been gathered over the year.

A Social Report should include the following sections:**Vision, Mission, Organisational Objectives and Values**

State these clearly, explaining their origins and how they will be met.

Stakeholder Analysis:

Include a stakeholder map or list and identify which stakeholder groups have been consulted and why.

Methodology:

Explain how you consulted, collected and processed information, including numbers and viewpoints; assumptions; who responded to consultations, how representative they are of those who were consulted.

Scope and Omissions:

Assuming that you cannot cover everything, explain why some objectives or stakeholders have formed the focus of your report and why others have not been covered at this time.

Report:

Focus on the organisation's performance, Objective by Objective and on the impact of that performance. Describe your achievements, backed up with numbers and viewpoints, covering social, economic and environmental impact. Use historical data, targets, benchmarks or other standards to compare your performance across time or against others.

Date: Clearly define the period covered by the report.

Previous Social Reports: Remember to report on the follow-up to issues and actions raised previously.

3 Social Reporting Process - Report & Verification

You should also include a completed **Key Aspects Checklist** (Appendix 9). The checklist covers the organisation's approach to human resources; its good governance; its "asset lock"; its financial sustainability; its environmental policy and practice; and its local financial and economic impact as an organisation.

Social Reports are intended to help organisations review their own performance, but can also aid reporting to funders or to the wider world. Audit or external verification of social reports can be valuable in providing an independent assessment of whether social reports provide a reasonable and reliable report. The Social Audit Network recognises that not all organisations will seek external verification and provide a **Social Audit Checklist** (Appendix 10) for self-verification.

Independent verification can be offered by recognised Social Auditors at three levels (audited self-verification, standard audit and standard plus), determined by the organisation's resources, size and complexity. For further information contact SAN at info@socialauditnetwork.org.uk

Appendices

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- Appendix 2 Template for Indicator Tree
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What Do We Already Do?

The purpose of this checklist is to help you establish what you already have that will contribute towards your social reporting. The good news is that no organisation starts with a blank sheet and all are already gathering information that will be relevant to their social accounts.

Please complete this form as accurately as possible. Tick if you are keeping records or collecting data that contributes to social accounting. Add information about where the information is kept in the 'source' column. This can then provide a useful summary of evidence/materials for your social accounts. Each section also has space for Comments where you can record strengths/weaknesses of your information systems or points you want to check later.

Sometimes it is a good idea for several people in the same organisation to complete the form independently and then compare results! The checklist is based on one developed by the **Social Audit Network** but has been tailored to meet the particular needs of CT groups.

Please remember that this checklist form is for your own benefit – you are “auditing” what you already do so that you can see where the gaps are which must be filled by your social reporting plan.

1. Core foundation information: Do you have...	Tick	Comment/ Source (e.g. document name or other reference)
A clear, concise mission statement?		
Clear objectives which express the social, environmental and economic purpose of your organisation?		
A way of linking what is done day by day (your activities) to the objectives?		
Clearly stated and agreed values which underpin the way your organisation works?		
A map of all the Stakeholders whom you affect and who can affect you?		
Any comments that might be useful for your social accounting?		
2. Record-keeping: Do you have...	Tick	Comment/ Source (eg document or other reference)
Records of all community transport movements? - total mileage/vehicle - mileage/trip - other.....		
Records of all community transport users? - personal requirements - number of trips/passenger - mileage/passenger		
Feedback sheets/evaluation forms from customers and user groups? And others you work with?.		
Detailed employee/volunteer records? Evidence that criminal record checks have been conducted?		
Record of training for: employees/volunteers/management committee Members?		
Regular employee and volunteer reviews/appraisals?		
Employee and volunteer time-sheets?		

Agreed indicators for aspects of your work?		
Annual performance targets?		
Is anecdotal feedback from customers, users and partners recorded in writing?		
Minutes of meetings?		
Any one off project or service evaluations which have been carried out?		
Reports to funders or other stakeholders?		
Any other records that might be useful for your social accounting?		
3. Stakeholder Consultation	Tick	Comment/ Source (eg document or other reference)
<i>A key part of social accounting is to consult with stakeholders. Do you undertake regular and systematic consultation with:</i>		<i>Explain how (NA if not applicable)</i>
– Employees		
– Volunteers		
– Individual customers		
– User groups and organisations		
– Suppliers of goods and services		
– Sub-contractors		
– Board or management committee members		
– Funders		
– Partner organisations		
– Potential customers or user groups		
– Wider community/general public		
Any other consultations/comments that might be useful for your social accounting?		
4. Use of and compliance with quality assurance or external standards	Tick	Comment/ Source (eg document or other reference)
<i>Many organisations already have to comply with various regulations or standards – use this section to check those which relate to your organisation</i>		
Health and safety policy and procedures		
Equal opportunities policy and procedures		
Operators' licence		
Vehicle license (describe e.g. S.19)....		
Vehicle certification (describe e.g. MoT, maintenance records)		
Driver certification (describe.. e.g. license, training records)		

Any other standards/comments that might be useful for your social accounting?		
5. Reporting on social, environmental and economic performance and impact: do you.....	Tick	Comment/ Source (eg document or other reference)
Publish a report on your organisation's impact on people, the environment and the local economy?		
Include a section in the annual report?		
Give a verbal report at the AGM?		
Circulate a newsletter with details to the community or to stakeholders?		
Write and publish relevant case-studies?		
Set annual targets for social, environmental and local economic performance?		
Send reports on social, environmental and economic performance to funders or other stakeholders?		
Any comments that might be useful for your social accounting?		
6. Discussion about social, environmental and economic performance	Tick	Comment/ Source (eg document or other reference)
<i>It is good practice to continually review the impact your work is having on people, the environment and the local economy: what do you do....?</i>		
Regular agenda item at Board/Management Committee meetings		
Regular discussion by the Management team		
Regular discussion by/with employees/volunteers		
<i>Regular discussion/consultation/focus groups with:</i>		<i>Details</i>
– Customers and user groups		
– Partner organisations		
– Funders		
– Wider community/general public		
Any comments that might be useful for your social accounting?		
Any other relevant examples of how you explore, assess or report social, environmental and economic performance? (Please continue on a separate sheet if needed...)		

Template for Indicator Tree

Aim/Objective (what you are hoping to achieve)	Stakeholders (who's involved)	Activity (what you do)	Outcome/Indicator (evidence of achievement)	Data Required	Source

C T Staff Survey

[This is a model questionnaire which should be tailored as needed to suit the requirements of your organisation. This survey may be completed on an individual basis or in conjunction with colleagues in a group meeting. It can be used for all staff whether paid or volunteer]

We would like you to answer a few questions regarding the operations of our Community Transport organisation. Your honesty will be appreciated. Your answers will be treated confidentially.

1. How do you find the physical work environment of the CT Premises?

- Poor OK Excellent

Are there any improvements you would like to suggest?

2. Do you get satisfaction and enjoyment from your work?

- None Some Very much

What would you suggest could improve your satisfaction and enjoyment?

3. Do you think your work tasks are well defined?

- Not at all OK Have clear purpose & meaning

What changes would you suggest to improve your job description?

4. What training have you received in order to perform your job?

Please list...

Do you think that the above training has been

- Not enough Just enough More than enough

What other training would you like to receive?

5. Are you satisfied with the terms and conditions of your employment?

- Not at all OK Very satisfied

What changes, if any, would you like to see?

6. Do you feel part of a supportive team?

Not at all Partly Very much

How could our team work be improved?

7. Do you feel encouraged to participate in influencing our direction and purpose?

Not at all Partly Very much

What would encourage you more? And what changes in direction and policy – if any – would you suggest?

8. Do you feel communication between staff and management is generally good?

Poor OK Very good

How can we improve communication?

9. Do you feel our Community Transport organisation has clear social and environmental objectives?

Unclear Clear Very Clear

Do you have any suggestions or comments to make about the objectives?

10. Community Transport exists to benefit the community. What do you think are the most important benefits we achieve?**11. Do you have any other comments about our CT organisation and the way it works?**

Thank you very much for taking part in this survey. Your opinions will help us improve what we do and how we do it.

Survey of Individual CT Users

This survey can be delivered by telephone or face to face – for example by sitting on the bus and asking customers if they will answer a few questions. Organisations should tweak the content and style of the questions to suit the service you provide, how you conduct the survey and how often. Most questions are relevant to both car and bus services, but not all will be relevant to all organisations and situations.

Note: Direct quotes can be used in marketing and therefore should be recorded in writing exactly as they have been spoken.

Start by introducing yourself and your purpose in asking questions. Be prepared to tell people what you will do with the information (i.e. whether the information will be used to improve the service to that individual or for the service as a whole) and how it will be used (i.e. whether the person's name and personal information will be kept or used in any way).

1. Which of our community transport services do you use?

*[Insert prompt list of **all** your different routes and services for individual passengers]*

-
-
-
-
-
-
-

2. For which of the following purposes do you use community transport?

Please tick all appropriate boxes...

- Leisure and entertainment
- Visiting friends and family
- Health care appointments
- Getting to work
- Going shopping
- Banking or other financial service
- Others (please specify)

3. What other forms of transport do you use in addition to community transport?

Please tick all appropriate boxes.....

- Public transport
- Taxis
- Lifts from friends and family
- Own transport
- None- community transport is the only transport I use
- Other (please specify)

4. When you use community transport how would you rate the service?

- Very poor Quite poor Average Good Very good

5. Were staff helpful when you rang in to book your journey?

- Very unhelpful Quite unhelpful OK Helpful Very helpful

6. Do you experience any difficulty obtaining tickets for your journeys?

Yes No

If yes, in what way is it difficult

7. a) Do the day(s) of the week suit you?

Yes No

If no, what day would suit you better?

7. b) Do the time(s) of the journey suit you?

Yes No

If no, what time would suit you better

8. Are the vehicles physically suitable to your needs?

Yes No

If no, please explain the problem

9. Are the vehicles clean enough?

Never Sometimes Always

If there is a cleanliness problem, what is it

10. Do the fares of the journeys seem appropriate?

Too high OK Too low

11. Is the driver courteous on the journey?

Never Usually Always

12. Are members of the office staff courteous and helpful?

Never Usually Always

13. Do you have sufficient information regarding the services [CT] offers?

Yes No

14. Do you have a Timetable?

Yes No

If yes, from where did you get it?..

[You could insert a prompt list here if the likely sources are well known]

15. Do you have any suggestions about how we could better publicise the community transport services

16. Did you experience any difficulty obtaining your CT Membership?

Yes No

If yes, in what way was it difficult?

17. Do you have any suggestions about how we can improve our community transport services?

18. Would you like to make any suggestions about new routes we might introduce?

19. We would like to understand the value our community transport service has on individuals. Can you explain how it helps you? (If prompting is required, steer the passenger to stories regarding mobility, independence, social participation, access to services, etc.)

20. We would also like to know if you think community transport has any effect on local trade and other businesses, or if it has any other impact in the community – what do you think?

21. Finally, Are there other regular journeys you would make if [CT] provided the service?

To:
Day of the Week:
Time of Day:

Thank you very much. If we can ever be of any further assistance to you, please be sure to ring the office on

Survey of Group CT Users

This survey can be delivered by phone or by post/email or face to face – or it might be useful to get some of the group users to come to a workshop.

Organisations should tweak the content and style of the questions to suit your own specific needs. Not all questions will be relevant to all organisations.

Note: Direct quotes can be used in marketing and therefore should be recorded in writing exactly as they have been spoken.

1. Which of our community transport services for groups do you use?

[Insert prompt list of all the services you offer groups]

- hire of bus with driver
- self-drive hire
-
-
-
-
-

2. For which of the following purposes do you use community transport?

Please tick all appropriate boxes...

- Leisure and entertainment
- Outdoor activities
- Getting to school
- Getting to training courses
- Going shopping
- Accessing healthcare
- Others (please specify)

3. What other forms of transport do you use in addition to community transport?

Please tick all appropriate boxes.....

- Public transport
- Taxis
- Private transport
- Other (please specify)

4. When you use community transport how would you rate the service?

- Very poor Quite poor Average Good Very good

5. Were the CT staff helpful when you rang in to make your booking?

- Very unhelpful Quite unhelpful
 OK Helpful Very helpful

6. Do you experience any difficulty in making bookings?

- Yes No

If yes, in what way is it difficult

7. Do you ever have problems with availability of transport?

Yes No

If Yes, how often?

8. Are the buses physically suitable to your needs?

Yes No

If no, please explain the problem

9. Are the buses always in a satisfactorily clean state?

Never Sometimes Always

If there is a cleanliness problem, what is it?

10. Do the hire costs seem appropriate?

Too high OK Too low

11. Is the driver courteous on the journey?

Never Usually Always NA

12. Are members of the office staff courteous and helpful?

Never Usually Always

13. Do you have sufficient information regarding the services CT offers?

Yes No

14. Which of the following best describes your group/organisation?

- school
- other educational establishment
- sports group
- youth club
- church based body
- OAP group
- adult social club
- private party
- other(please describe)

15. Do you have any suggestions about how we could better publicise the community transport services?

16. Did you experience any difficulty obtaining your CT Membership?

Yes No

If yes, in what way was it difficult?

17. Do you have any suggestions about how we can improve our community transport services?

18. Would you like to make any suggestions about new services we might introduce?

19. We would like to understand the value our community transport service has for our users. Can you explain how it helps you? (If prompting is required, steer the reply to stories regarding mobility, independence, social participation, access to services, etc.)

20. We would also like to know if you think community transport has any effect on local trade and other businesses, or if it has any other impact in the community – what do you think?

Thank you very much. If we can ever be of any further assistance to you, please be sure to ring the office on

Sample Questions for Local Organisations, Partner Agencies, Funders and Contractors

[These are a series of questions which can be asked either face to face, by telephone or by email. You should select those questions which are relevant to your purpose according to which stakeholders you are intending to consult.]

About Marketing Materials

Do you have information regarding the services our organisation offers?

Yes No

If yes, how did you receive this information?

- Received by post/email
- Accessed from website
- Seen in local shop
- Read in Church Notes
- Read in local paper
- Other

About Membership

Are you a member of our organisation?

Yes No

Did you experience any difficulty obtaining your Membership?

Yes No

If yes, in what way was it difficult?

About the Impact of Using CT

If you are a user of CT we would like to understand how CT impacts upon your organisation's ability to deliver services to its members / service users. Please tell us of both positive and negative impacts:

About Impact On Local Trade And Business

We would also like to understand what impact CT has on local trade, business and access to employment – please tell us what you think:

About Value for Money

As a funding body contributing to our organisation, do you consider that you are getting good value for money?

very good good OK poor very poor

Please expand on your rating....

About Service Effectiveness

As an agency contracting our organisation to provide services how effective and efficient do you consider us to be?

very effective effective OK ineffective very ineffective

Please expand on your rating.....

Are there other services you think our organisation may be able to or should provide?

Finally, How can our organisation improve?




Thank you very much for your time.

Survey of Volunteer Drivers

This is a quick survey form designed for volunteer drivers who either use their own car or drive CT vehicles. The survey could be completed by drivers individually or it could form the basis of a discussion at a group meeting.

Start by introducing yourself and your purpose in asking questions. Be prepared to tell volunteers what you will do with the information (i.e. whether the information will be used to inform management's relationship with the individual volunteer, or to guide improvements to the service as a whole) and how it will be used (i.e. whether the answers they give will be treated anonymously).

For each item, please tell us how satisfied you are by ticking the relevant

How satisfied are you with...?		<input type="radio"/>		<input type="radio"/>	
Your relationship with the CT Office	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The way you are treated as a volunteer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reimbursement of expenses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Operation of the services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promotion of the services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The booking system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The fare collection system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training you have received	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your relationship with passengers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Monitoring and record keeping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Do you have any suggestions for additional routes or other services CT might provide?

We would also like to understand what impact CT has on its users and also on local trade, business and access to employment – please tell us what you think:




Many thanks for your help!

Survey of Operators/Suppliers

This is a quick survey form designed for suppliers of goods and services and sub-contracted transport operators. This could be completed by people individually or over the phone, or it could form the basis of a discussion at a group meeting.

Start by introducing yourself and your purpose in asking questions. Be prepared to tell volunteers what you will do with the information (i.e. whether the information will be used to inform management's relationship with the individual volunteer, or to guide improvements to the service as a whole) and how it will be used (i.e. whether the answers they give will be treated anonymously).

For each item, please tell us how satisfied you are by ticking the relevant

How satisfied are you with....?		<input type="radio"/>		<input type="radio"/>	
The tendering process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contract conditions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your relationship with CT Office	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The operation of the services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promotion of the services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your relationship with passengers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The booking system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The fare collection system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Any training CT has arranged	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Monitoring and record keeping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The payment you receive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Many thanks for your help!

Discussion Questions for the Board / Management Committee members when considering the findings of the social report

What worked well?

What opportunities arose and how have we utilised them?

What barriers arose and how were they addressed?

What lessons have we learnt?

What would we do differently?

How can we improve participation from outside the organisation? (users, funders, community groups etc.)

How can we build on these lessons in the future?

Key Aspects Checklist for Social Accounts

In each of the sections below there is space to write in additional information – or, where appropriate, additional material should be attached. *Where a particular item is not relevant to your organisation please tick the **NA** (not applicable) column.*

The **Date/Details/Comments** column should be used to elaborate where necessary on the **Y/N/NA** response. [For example against Annual General Meeting might be written “*held on 30 October 2008; 21 attended*” or against Equal Opportunities might be written “*adopted August 2003, copy attached - due to be reviewed*”.]

1 Human Resources

		Number			Date/Details/Comment
		Y	N	NA	
1.1	Number of employees: Full-time Part-time Occasional Volunteer				
1.2	Number of members				
1.3	Policies and Procedures in place:				
	a. employee contracts : paid staff volunteer staff				
	b. employee job descriptions: paid staff volunteer staff				
	c. staff appraisals: paid staff volunteer staff				
	d. grievance procedures				
	e. disciplinary procedures				
	f. equal opportunities				
	g. other, such as family friendly policy				

1.4	Investors in People				
1.5	Consultations:				<i>[It is expected that organisations will from time to time consult their workers as part of the social accounting process both about the Key Aspects and about performance and impact in respect of the Organisational Objectives. Please attach blank questionnaires used in respect of Key Aspects + summaries of findings as appropriate]</i>
	a. with paid employees				
	b. with volunteers				
	c. other				
Additional information					

2 Good Governance and Accountability

		Y	N	NA	Date/Details/Comment
2.1	Legal form of organisation: Constitution (tick appropriate):				
	Sole trader <input type="checkbox"/>				
	Association <input type="checkbox"/>				
	Partnership <input type="checkbox"/>				
	Company limited by shares <input type="checkbox"/>				
	Company limited by guarantee <input type="checkbox"/>				
	Industrial and Provident Society <input type="checkbox"/>				
	Credit Union <input type="checkbox"/>				
	Community Interest Company <input type="checkbox"/>				
	Workers Co-operative <input type="checkbox"/>				
	Charitable status <input type="checkbox"/>				
	Housing Association <input type="checkbox"/>				
	Other				
	What?.....				

2.2	Appropriate annual return filed				<i>[please state to which regulatory body and date of filing]</i>
2.3	Annual General Meeting held				<i>[please state date and attendance]</i>
2.4	Regular Board/Management Committee meetings				<i>[please state number of meetings in year]</i>
2.5	Annual Report published				
2.6	Membership increased/decreased				<i>[delete as appropriate and give numbers]</i>
2.7	Social Accounts prepared				
2.8	Social Accounts verified by Social Audit Panel				
2.9	Social Accounts reported to Stakeholders				<i>[explain how]</i>
2.10	Consultations:				<i>[please attach blank questionnaires used + summaries of consultations undertaken]</i>
	a. with members of the organisation				
	b. with members of the Board or Management Committee				
	c. with Advisory Body members (if appropriate)				
2.11	Other quality systems used				<i>[please list if any]</i>
Additional information					

3 Asset Lock and Use of Surplus

		Y	N	NA	Date/Details/Comment
3.1	Asset Lock in constitution				<i>[please give paragraph reference]</i>
3.2	Use of surplus:				<i>[please tick all relevant in current year]</i>
	a. no surplus made				
	b. to reserves or re-investment				
	c. to charitable purposes				
	d. to employee bonuses				
	e. to directors' emoluments				
	f. to other				<i>[please explain]</i>
Additional information					

4 Financial Sustainability

		Y	N	NA	Date/Details/Comment
4.1	Annual Accounts prepared and filed				<i>[please state with which regulatory body filed]</i>
4.2	Balance sheet strengthened/weakened				<i>[please delete as appropriate]</i>
4.3	Profit/loss for year				<i>[please delete as appropriate and give figure]</i>

Additional information *[please attach a summary of latest audited accounts]*

5 Environmental Sustainability

		Y	N	NA	Date/Details/Comment
5.1	Environmental policy in place				<i>[please attach]</i>
5.2	Reports on environmental practices available:				<i>[please attach reports if available]</i>
	a. energy use: heat and light				
	b. energy use: transport				
	c. consumption of materials				
	d. re-use of materials				
	e. recycling of materials				
	f. waste disposal				
5.3	Carbon footprint calculated				<i>[please attach]</i>
5.4	Other				<i>[please list and attach as appropriate]</i>
Additional information <i>[Organisations may elect to prepare a brief separate report outlining their Environmental Policies and Practices, or may refer to specific, recognized environmental standards they have adopted. Alternatively they may submit a completed Green Office checklist (file CD 40 in the 2005 SA Manual CD Rom)]</i>					

6 Local Financial and Economic Impacts in the Community

		Y	N	NA	Date/Details/Comment
6.1	Purchasing policies defined				<i>[please attach]</i>
6.2	Report on effect of purchasing policies available				<i>[please attach]</i>
6.3	Local multiplier effect of organisation calculated				<i>[please attach]</i>
6.4	Savings to public purse calculated				<i>[please attach as appropriate]</i>
6.5	Value of volunteer contribution				<i>[please attach as appropriate]</i>
6.6	Total inward investment attracted				<i>[please attach as appropriate]</i>
6.7	Cash and in-kind contributions to the community				<i>[please attach as appropriate]</i>
6.8	Other financial and economic impact calculations:				<i>[please describe and/or attach summary reports as appropriate]</i>
Additional information <i>[please refer to CD file 42 in the 2005 SA Manual CD rom]</i>					

Verification Checklist

[To be used to assess the social report against the Key principles of the Social Audit Network. This can be a self-verification exercise or it can form the basis of an independent audit by a Social Audit Panel - see www.socialauditnetwork.org.uk for more details]

1	Clarify purpose	☺	☹	⊗	Comments
1.1	Are the Values of the organisation clearly stated?				
1.2	Are all Organisational Objectives, with their associated Activities, clearly stated?				
1.3	Do the social accounts demonstrate how what the organisation does results in achieving the desired performance and impact as expressed in the Mission?				
2	Define scope	☺	☹	⊗	Comments
2.1	Has the organisation prioritised its Organisational Objectives for the purpose of these social accounts?				
2.2	Is the scope of what these social accounts report on clearly explained?				
2.3	Are the reasons for all omissions clearly explained?				
2.4	Do the social accounts explain when the organisation will report on any objectives not included in the scope?				

2.5	Do the social accounts explain when the organisation will consult with key stakeholders not consulted?				
2.6	What guidance would the Social Audit Panel give regarding the Scope for future social accounts?				
3	Stakeholder engagement	☺	☹	⊗	Comments
3.1	Has a stakeholder analysis been undertaken and reported?				
3.2	Have any important stakeholder groups been omitted from that analysis (map)?				
3.3	Is the basis on which stakeholders were selected for consultation clearly explained?				
3.4	Can the stakeholders selected for consultation be considered to be reasonably representative?				
3.5	Have stakeholders been consulted: a) about how the organisation lives up to its stated Values? b) about the relevance to them of the organisation's Objectives and Activities? c) about the relative priority of Objectives? d) about how well the organisation has performed in respect of the stated Objectives				

	e) about what impacts the organisation has achieved in respect of the Objectives reported in the social accounts?				
3.6	Have the methods used to consult stakeholders been effective?				
3.7	What guidance would the Social Audit Panel give regarding which stakeholders should be consulted in the next social accounting cycle?				
3.8	What guidance would the Social Audit Panel give regarding appropriate methods of consultation in the future?				
4	Determine materiality	☺	☹	☹	Comments
4.1	Do the social accounts use evidence which can be considered to be satisfactorily relevant (material)?				
4.2	Do the social accounts report on the social, environmental and economic aspects, as appropriate, in relation to all Organisational Objectives covered by these social accounts?				
4.3	Are the sources of quantitative information used fully described and explained?				

4.4	Are the methods used for consulting stakeholders fully explained (including sample sizes, response rates etc)?				
4.5	Is there reasonable balance given in the social accounts to the reports on different Organisational Objectives and the views of different stakeholders?				
4.6	Is there reasonable balance in the social accounts between the views of the different stakeholders consulted?				
4.7	Is the data used in the social accounts adequately up to date?				
4.8	Are any methods used and assumptions made for calculating the financialisation of impact clearly explained?				
4.9	Do the social accounts include a satisfactory Compliance section?				
5	Make comparisons	☺	☹	⊗	Comments
5.1	Do the social accounts report year on year targets and related performance?				
5.2	Does the organisation make comparisons of its performance and impact using appropriate benchmarks and external standards?				

6	Be transparent	😊	😐	😞	Comments
6.1	Are the social accounts organised in an understandable format?				
6.2	Will the full social accounts (including the notes of the Social Audit Panel meeting and the Social Audit Statement) be made accessible to stakeholders?				
6.3	Are there satisfactory plans to publish and disseminate the social accounts (or a summary) to stakeholders?				
6.4	Will stakeholders be involved in discussing or feeding back on the issues which arise from the social accounting process?				
7	Verify accounts	😊	😐	😞	Comment
7.1	Has a sample of data been satisfactorily examined/traced to source?				Please list: a. b. c. d. e.
7.2	Were the social accounting records fully available and accessible to the Panel?				
7.3	Are adequate social accounting systems (qualitative and quantitative) in place?				

8	Embed the process	😊	😐	😞	Comment
8.1	Do the social accounts report on the follow-up of issues raised in an earlier social audit?				
8.2	Are social accounts prepared (intended to be prepared) on a regular basis?				
8.3	Is the understanding of social accounting embedded in the organisation?				
8.4	Is the practice of social accounting embedded in the organisation?				
9	Financialisation of social impacts	😊	😐	😞	Comment <i>[note: this section for organisations which have used SROI calculations]</i>
9.1	Are the financial indicators used considered reasonable?				
9.2	Are the assumptions which underpin the financial calculations clearly explained?				
9.3	Are any sensitivity analyses used considered to be sufficiently balanced?				

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