

European Social Fund - Community Initiative
Equal 2004 Action 2

Development Partnership Agreement

Development Partnership's Action 1 Dossier Number
(please enter)

04E162ESO

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The Crystal Mark is Plain English Campaign's seal of approval. It means this document is as clear as it can be for its intended audience.

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Section 1: Lead Partner and Development Partnership Details

1.1 Operational Programme Number **2000 GB 05 0 PC 001**

1.2 Name of Development Partnership (DP)

1.3 Contact details of the lead partner or DP Ltd

Please note that the organisation or DP named below must be legally constituted (please see Section 2.4).

Name

Full address

Town

County

Postcode

Website

Main contact	<input type="text" value="Kate Annison"/>	Deputy contact	<input type="text" value="Karen Holdsworth-Canon"/>
Position	<input type="text" value="Economic Inclusion Policy Manager"/>	Position	<input type="text" value="Social Inclusion Policy Manager"/>
Phone number	<input type="text" value="01483 500 797"/>	Phone number	<input type="text" value="01483 500 789"/>
Fax number	<input type="text" value="01483 484 247"/>	Fax number	<input type="text" value="01483 484 247"/>
Email	<input type="text" value="kateannison@seeda.co.uk"/>	Email	<input type="text" value="karenholdsworthcanon@seeda.co.uk"/>

1.4 What type of organisation are you?
Please specify if 'Other'.

1.5 Size of organisation: please tick to show the total number of people regularly working in the organisation.

Staff – up to 10 Staff – between 51 and 250
Staff – between 11 and 50 Staff – more than 250

1.6 Bank account details for making payments

Please confirm the lead partner or DP Ltd will be prepared to set up a separate bank account or

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unique cost centre for the **Equal** DP (please tick).

Section 1: Lead Partner and Development Partnership Details

1.7 Priorities for Equal support *(Please tick one only.)*

Employability	Theme A	<input type="checkbox"/>	Entrepreneurship	Theme C	<input type="checkbox"/>
	Theme B	<input type="checkbox"/>		Theme D	<input checked="" type="checkbox"/>
Adaptability	Theme E	<input type="checkbox"/>	Equal opportunities	Theme G <i>(not funded in GB)</i>	
	Theme F	<input type="checkbox"/>		Theme H	<input type="checkbox"/>
Asylum seekers	Theme I <i>(including Northern Ireland)</i>	<input type="checkbox"/>			

1.8a Geographical focus *(Please tick one only.)*

UK wide (see below) GB National (see below) Wales England only

UK wide must include partners in Northern Ireland, Scotland and Wales.

GB National must include partners in Scotland or Wales or both.

1.8b For 'England only' DPs *(Please tick one only.)*

Multi-regional Regional Local or sub-regional

1.9a Which countries and Government Office regions are to be covered by your DP activities?

(Please tick all that apply.)

Wales Scotland Northern Ireland
(Theme I only)

East Midlands North East South West

East of England North West West Midlands

London South East Yorkshire & the Humber

1.9b Is your DP mainly active in rural or urban areas or in both? *(Please tick one only.)*

Mainly rural Mainly urban Other – both urban and rural

1.10 For bids submitted under Themes A and B only:

Will your DP target wards in the most deprived areas as defined in Annex A of the DPA Guidance. Yes No

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Section 1: Lead Partner and Development Partnership Details

1.11a Does your DP focus on a particular sector?

Yes

No

1.11b If 'Yes', please identify:

1.11c If 'Yes', please select one from the following list to best describe the sector.

Agriculture (primary sector)

Services (tertiary sector)

Industrial (secondary sector)

Specific discrimination or inequality problems

1.12 Start date for Action 2

1st July 2005

1.13 End date for Action 2

30th June 2007

Section 2: Are you eligible?

To be eligible within **Equal** your DP must be legally constituted (DP Ltd) or led by a legally-constituted organisation. Please see DPA Guidance for further details.

2.1 Are you applying as a lead partner or as DP Ltd? lead partner

2.2 If you have ticked 'DP Ltd' in Section 2.1, please confirm that all the partner organisations in your DP listed in Annex 1 are members of DP Ltd.

2.3 If you have ticked 'DP Ltd' in Section 2.1, please confirm that you have enclosed the Memorandum and Articles of Association, and the certificate of incorporation of DP Ltd.

2.4 Is your lead partner or DP Ltd legally constituted (does it have a legal document such as an agreement or Memorandum of Association)? Yes No

Please enter the legal status of your lead partner or DP Ltd	Government Agency
--	-------------------

2.5 Does your DP have a written equal opportunities policy? Yes No

Further details of your policy are required at Section 7.1.

2.6 Will DP activities be restricted to a particular racial group? Yes No

If 'Yes', please give details in the box below of how DP activities are in line with the Race Relations Act 1976, and provide a declaration to this effect (see Annex B of DPA Guidance).

2.7 Will DP activities be restricted to a single sex? Yes No

If 'Yes', please give details in the box below of how DP activities are in line with the Sex Discrimination Act 1975, and provide a declaration to this effect (see Annex C of DPA Guidance).

2.8 Please describe how you will publicise that the European Social Fund (ESF) is involved in your DP throughout Action 2, and how target groups and policy makers will know that ESF is part-funding your activities.

Throughout Action 2 of the Cultural Shift SE Partnership ESF support will be actively publicised in the following ways:

- By placing the ESF logo on all printed and published materials including, studies evaluation reports, reports documenting the project and project outcomes
- On the websites of all partners involved
- In press and other media releases including radio/local TV items
- By reference to ESF support in all recruitment and induction processes via advertisements, application forms and other relevant documents

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2.8 Please describe how you will publicise that the European Social Fund (ESF) is involved in your DP throughout Action 2, and how target groups and policy makers will know that ESF is part-funding your activities.

- Through inclusion of acknowledgement of ESF support in the dissemination and marketing strategies and promotion material of all partners
- By wide dissemination of the project evaluation to key decision and policy makers in the private, voluntary and statutory sectors
- At local and international level events, workshops, and other partnership events

Section 3: Summary**3.1 Please provide a 500-word summary of your DPA. (500 words)** Please refer to the DPA Guidance for what the summary should include.

The Cultural Shift partnership has two strategic aims:

- To model inclusive employment models delivered through independent social enterprises.
- To create new protocols for entrepreneurial partnerships between mainstream public sector providers and social enterprises in the South East.

In 2003, RDA research identified partnership with mainstream service providers as the a key factor in developing a sustainable market for social enterprise solutions, creating sustainable social enterprises that offer inclusive employment to the most excluded.

The South East England Development Agency leads the Cultural Shift Partnership on behalf the South East Regional Social Enterprise Steering Group and three demonstration agencies, Portsmouth City Council, Portsmouth Housing Association and HMP Standford Hill. The European Institute of Social Services will provide management and co-ordination support to SEEDA.

The Partnership will achieve its objectives through activities operating in 5 programme areas: Demonstration, Networking, Research, Resourcing and Influencing.

The partnership will work with Uk, Polish and Italian teams to demonstrate the processes and inputs to effective cross sector engagement and facilitation of social enterprise. The demonstration partners will participate in an action research programme focusing on incubation and partnership development as they seek to set up three social enterprises operating in partnership between the public, private and VCS sectors.

At the regional level, practitioners will engage in the broad research process through networking programmes which will offer an opportunity to engage in cross sector dialogue around key issues facing deliverers of inclusive enterprise and employment.

The partnership is a key delivery element of the wider South East Social Enterprise strategy implementation process, linking in to other emerging resources and capacity building programmes. Outputs from the programme will be fed into the regional policy framework and lobbying process into central government. The outputs from the development partnership will include:

- Key business and policy practice guides
- Case studies
- Academic research
- networking forums
- Policy recommendations

Innovation will be achieved through the partnership across the three mechanisms outlined in the EQUAL Innovation Good Practice Guide.

The focus of the DP will be providing innovation models for inclusive employment practice through social enterprise to the most excluded groups of the region through drawing on international practice. Excluded groups will be empowered through participation in the learning process, access to employment opportunities, and dissemination of models throughout regional policy.

The Cultural Shift will seek to empower beneficiaries in:

- Confidence building
- Knowledge
- Skills development
- Supportive relationships
- Control of decisions
- Providing resources for help/information to meet individual needs
- Involvement in developing models of intervention to ensure that they are accessible and relevant to their needs.

The DP target groups are:

3.1 Please provide a 500-word summary of your DPA. (500 words) Please refer to the DPA Guidance for what the summary should include.

- Refugees
- Ex-offenders
- People addicted to drugs and alcohol
- Those with disabilities (physical and learning)
- People disadvantaged through education
- People disadvantaged by geographical location
- People with care responsibilities

These groups are recognised by the social exclusion unit as hard to integrate through traditional employment measures, and as facing multiple barriers to employment.

3.2 Please provide a 100-word executive summary of your DPA. (100 words) Please refer to the DPA Guidance for what the summary should include.

Cultural Shift South East represents collaboration between:

- SEEDA (Lead partner)
- the South East Regional Social Enterprise Steering Group
- The European Institute of Social Services
- The Skoll Foundation at Said Business School Oxford
- Portsmouth City Council
- Portsmouth Housing Association
- HMP Stamford Hill

The DP will stimulate debate, facilitating a process of cultural change across the all sectors..

It will set up 3 enterprise teams to demonstrate how to 'incubate' sustainable social enterprise in these sectors.

This will improve the understanding of the fine balance of managing social responsibility within a business framework.

Section 4: Rationale

4.1 Labour market rationale

Please describe the rationale for your DP in terms of labour market disadvantage. (300 words)

In June 2004 the National Labour Market Survey showed that the SE had 163,000 people registered as unemployed, the second highest absolute number next to London.

Within this figure exists higher proportions of exclusionary factors amongst the regions unemployed, including:

- disability claimants
- of long-term unemployment in the 16-24 year old and over 50 year old categories
- carers
- unemployment in areas of multiple deprivation
- of unemployment in some ethnic groups

Research, (SEEDA 2003), identified 'partnerships with mainstream service providers as a key factor in creating sustainable social enterprises that offer inclusive employment to the most excluded', and, 'partnership approaches to social enterprise delivery were limited by regulatory and cultural barriers between the public, private and voluntary and community sectors'.

Research undertaken by Kotter and Heskitt (1990s) illustrated how shared values and unwritten rules can profoundly enhance economic success, or conversely lead to failure to adapt to changing markets and environments.

The DP has two strategic aims:

- To model inclusive employment models delivered through independent social enterprises.
- To create new protocols for entrepreneurial partnerships between mainstream public sector providers and social enterprises in the South East.

The DP will achieve these objectives by working through a transnational, multi-partner based action research process of participative design and development. The DP enterprises will be working effectively with mainstream agencies to create policy tools and models that will be mainstreamed into regional policy.

The DP will stimulate a process of cultural change across voluntary, private, and statutory sectors. This cultural change intends to improve the understanding of the fine balance of managing social responsibility within a business framework. It will identify where cultural barriers exist; through policy, systems, and the actions of key gatekeepers within organisations. It will map out methods to overcome these barriers.

4.2 Target groups and barriers

Please describe the target groups your DP will help in Action 2 and the specific barriers they face. (300 words)

The Cultural Shift partnership exists to create opportunity for efficient and equitable service delivery and employment to all groups facing discrimination in the region. The partnership however has a specific remit to address those suffering from multiple exclusion which prevents participation in the labour market, including;

- Refugees
- Ex-offenders
- People addicted to drugs and alcohol
- Those with disabilities (physical and learning)
- People disadvantaged through education
- People disadvantaged by geographical location
- People with care responsibilities

These groups are recognised by the social exclusion unit as hard to integrate through traditional employment measures and will be addressed on two levels:

Strategic – through the development of service models and partnership practice that will mainstream measures for all excluded groups into policy development.

4.2 Target groups and barriers

Please describe the target groups your DP will help in Action 2 and the specific barriers they face. (300 words)

Local and specific – through the direct provision of employment and volunteering opportunities to excluded groups through the set up and operation of 3 enterprise teams.

These groups currently experience the following barriers that the partnership will aim to overcome:

- Employer discrimination due to criminal convictions, racism, gender, age
- Lack of in-work educational and physical support to those suffering with learning and physical disabilities
- Lack of self esteem, motivation and self control
- Lack of social and basic skills
- Lack of financial and physical support for those with limitations due to carer responsibilities
- Benefit based restrictions to workforce entry
- Lack of cultural awareness
- Lack of emotional support and employer understanding for those overcoming addiction or mental health problems
- Exclusion from the labour market due to remote access to affordable transport.

The partnership will work proactively in Action 2 to ensure that employment conditions take into account the above barriers.

Section 5: Partnership analysis**5.1 Partnership features**

Please describe the main features of the partners involved in your DP, covering both the lead partner or DP Ltd named in Section 1.3 and the other domestic partners named in Annex 1.

Partners	Name of organisation	Experience, skills, expertise and resources	Interests and expectations	Barriers and issues	Main role(s) in the DP
Lead partner	South East England Development Agency	SEEDA is responsible for the economic development and regeneration of the SE, having strong links to the economic development strategy for London and the SE Engagement with business and employers around issues of: <ul style="list-style-type: none"> ▪ Diversity and Equality ▪ Workforce development ▪ Retention and recruitment of excluded groups in the labour market Promotion of enterprise and self employment in deprived areas and communities of interest	Stimulating new markets for social enterprise within the region. Expectations are that through understanding the public private and VCS will learn the value of social enterprise and inclusive employment	Values and systemic organisational barriers to effective partnerships limiting the understanding of the role and potential of social enterprise.	Lead partner, co-ordinator of the main programme, financial and output monitoring.
Partner 1	Portsmouth City Council	PCC is a local authority engaged in a range of regeneration and economic development programmes across the sub region.	Interest in establishing democratic control mechanisms of programmes exiting from government	The need for support to public sector facilitators of partnerships and greater capacity building of the community to lead new models of employment	Demonstration partner, co-ordinating participation of the economic development and regeneration enterprise team.

Please quote in all correspondence

Partners	Name of organisation	Experience, skills, expertise and resources	Interests and expectations	Barriers and issues	Main role(s) in the DP
			control	and service provision.	
Partner 2	Portsmouth Housing Association	PHA has an excellent track record of undertaking housing plus initiatives that empower residents of social housing to engage in economic activity.	Interest in the ability of a social provider to create mechanisms that generate both social and economic return, enabling services to local communities and communities of interest to become more sustainable in the long term.	Legal and regulatory barriers to operating across the charity / social enterprise/ private realm whilst using social enterprise as a mechanism to offer local residents to access high quality employment	Demonstration partner, co-ordinating participation of the IT support services enterprise team.
Partner 3	HMP Stanford Hill	HMP Stanford Hill is an Open Prison with vast experience of developing training and offender re-integration programmes	The development of an enterprise training and development programme that can be self-sustaining and a means of internal learning and eventually lead to a greater ability of ex-offenders to integrate effectively into employment on release.	Creating sustainable programmes of learning that have long term impact on the life chances of ex-offenders to successfully re-integrate into the employment market.	Demonstration partner, co-ordinating the horticulture enterprise team, working with offenders.
Partner 4	Skoll Centre for Social Entrepreneurship at Oxford Business School	The Skoll Centre is a specialist research institution, part of Oxford University Business School. The foundation specialises in social entrepreneurship	The role of partnership in the emerging government driven agendas of social enterprise development and facilitation	Identifying the soft elements of power, values, and systemic barriers, which hinder the effective transfer from informal to formal enterprise partnership structures.	Research lead

Please quote in all correspondence

Partners	Name of organisation	Experience, skills, expertise and resources	Interests and expectations	Barriers and issues	Main role(s) in the DP
Partner 5	RAISE	Regional Action and Involvement South East is the regional VCS infrastructure body for the South East, it has expertise in the specific barriers to VCS participation in enterprise partnerships	Deconstructing the power and value based barriers to effective partnership working and contracting within cross sector contexts	Barriers of understanding about the long term policy implications for the VCS if they fully embrace social enterprise. Also establishing the role and potential for social enterprise to assist the VCs to deliver its own objectives around inclusion and equity.	Steering group function. Mainstreaming and dissemination partner, participation in research and operation of innovation and networking opportunities.
Partner 6	Business Link	Business Link is the government supported business support agency for SMEs in the UK. It has a regional infrastructure offering business support brokerage across all counties of the South East.	Adapting the mainstream support functions of business link to represent the specific business support needs of the emerging social enterprise market	Cultural barriers within the traditional business support networks that may or may not hinder the effective support of new partnership structures as they approach formal incorporation into enterprise structures.	Steering group function. Mainstreaming and dissemination, participation in the research process, support in the development of incubation models for wider roll out.
Partner 7	Partner joining delayed				
Partner 8	The Development Trusts Association	The DTA represent the Development Trust model of social enterprise throughout the region and are experts in the development of asset based models of social enterprise.	Interest in expanding the social enterprise market in the region in order to develop a greater level of social equity and sustainability of services across the region.	Cultural barriers to partnership working and contracting with other sectors due to a lack of understanding of the role and potential of social enterprise solutions. Also the expansion of the asset based model for partnerships transitioning from previous government support	Steering group function. Advisory support to the networking and recommendation implementation stages of the programme.

Please quote in all correspondence

Partners	Name of organisation	Experience, skills, expertise and resources	Interests and expectations	Barriers and issues	Main role(s) in the DP
Partner 9	Partner joining delayed				
Partner 10	Partner joining delayed				
Partner 11	Oxford Swindon and Gloucester Co-op	OSGC are one of the largest social enterprises in the South East. They have direct experience of the management issues faced by social enterprises as well as tackling the key issues related to spinning off new enterprises.	Increasing opportunities and support for social, in particular co-operative, enterprise in the region	Cultural and systemic barriers to partnership evolution	Steering Group Role Business Advise and network participation
Partner 12	Partner organisation folded and removed August 05				
Partner 13	South East Regional Assembly	SEERA provides an accountability structure for all aspects of development and planning in the South east, it has a role as an advocate and influencer of policy across a wider realm of development and planning issues.	Building social, environmental and economic stability into the regions economy	The role of cross sector partnerships.	Steering Group Role Mainstreaming and dissemination and policy influence.
Partner 14	Unltd	Unltd are an independent organisation that look to support social entrepreneurs from a range of disadvantaged backgrounds. They have in depth knowledge of the determinants of entrepreneurship	Opening up social enterprise markets, increasing demand and giving greater opportunity for entrepreneurs from a diverse range of backgrounds to participate in socially entrepreneurial	Limitations on market development related to understanding and inherent organisational barriers in all three sectors.	Steering group function Advisory support for the entrepreneurship networking role of the development partnership.

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Partners	Name of organisation	Experience, skills, expertise and resources	Interests and expectations	Barriers and issues	Main role(s) in the DP
			activity.		
Partner 15	The NHF Social Enterprise Development Group (Lead by Amicus Housing Association)	The NHF social enterprise development group is an informal partnership of 40 RSLs led by Amicus Housing and the National Housing Federation.	They have a key interest in the role and potential of the social enterprise model in order to enable customer focussed activities throughout affordable housing and the neighbourhoods of the South East	Lack of understanding of the market, role and potential of social enterprise to deliver inclusive employment options that address the housing plus and sustainable communities agendas	Steering group function Learning network participation and demonstration.
Partner 16	European Institute of Social Services	EISS has considerable experience of management of EQUAL projects in Round 1 and of previous Employment Initiatives, and has a good network of transnational contacts. EISS has managed and co-ordinated a wide variety of transnational, European and national projects funded by ESF and other funding streams.			

Please describe all of your partners, numbering each one as appropriate. Press *Tab* in the last cell of the table to add a row for an additional partner.

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Section 5: Partnership analysis

5.2 Is the lead partner or DP Ltd named in Section 1.3, or are any of the domestic partners named in Annex 1, partners in another Equal-funded DP? Yes No

5.3 If you answered 'Yes' to 5.2 above, please enter the organisation's name and the name of the DP.

Organisation	DP name	Dossier Number (if known)
EISS	TATE	04E102ESO
EISS	ACE2	04E076ESO
EISS	Equal Brighton & Hove	04E204ESO
EISS	EXODUS	04E119ESO
SEEDA	EXODUS	04E119ESO
SEEDA	Equal Brighton & Hove	04E204ESO

Section 5: Partnership analysis**5.4 Stakeholder involvement**

Please explain how your DP will involve the target groups, policy makers, employers, voluntary and community-sector organisations and other stakeholders in the designing and delivering of its Action 2 work plan. (300 words)

South East England Development Agency – is responsible for the overall management of the DP, supported by the European Institute of Social Services.

The European Institute of Social Services (EISS) will provide management and co-ordination support to the lead applicant, SEEDA.

Portsmouth City Council will set up two community based social enterprises in areas of deprivation in Portsmouth. The 'social aim' of the enterprise concept is to develop a sustainable mechanism of regeneration delivery and to move services into direct ownership by the community itself.

HMP Standford Hill (The Glass House project), will establish a Horticulture social enterprise that will provide a mechanism for education and training in enterprise skills that is self supporting. The key social aim of the enterprise will be to assist in the reintegration of offenders into the community, through running a social enterprise that provides good quality services for the community.

Portsmouth Housing Association (The Harbourside ICT) will establish affordable ICT solutions for the voluntary and community sector in South East Hampshire in parallel with an intermediate labour market model for excluded groups, training them in ICT support. Harbourside will look beyond the role of partnership in the set up stages and will consider the Cultural issues in relation to the growth and operation of social enterprise models that are drawing in inputs from all three sectors.

All partners and beneficiaries have an equal say in strategic decision-making processes, reporting through the Management Board, made up of one representative from each partner organisation, and will take an active part in management of the DP, monitoring, evaluation, and transnational activities.

Beneficiaries will be supported to attend and contribute to management board and other meetings.

All partners have been involved in developing A2:

- strategy and work plan
- decision making structure
- Equal opportunities policy and E.O. workplan
- Evaluation & Research briefs

5.5 Resource management

Please explain how your DP will guide, manage and provide resources to effectively deliver its Action 2 work plan. (300 words)

SEEDA will chair Board meetings, to decide issues by consensus, or vote when necessary. The Management Board will communicate regularly with partners to ensure good communication and to promote the benefits of partnership working. Beneficiaries will be supported to attend and contribute to management board and other meetings.

All partners have been involved in developing A2:

- strategy and work plan
- decision making structure
- Equal opportunities policy and E.O. workplan
- Evaluation & Research briefs

Empowerment, evaluation, research, transnational, and equal opportunities working groups will be developed to discuss progress, deal with problems, and to advise the management board.

Cultural Shift partners will sign partnership agreements with the lead partner outlining their roles and responsibilities. These agreements will include specific reference to each partner's contribution to the overall Action 2 Workplan.

Section 5: Partnership analysis**5.6 ESF administration****Please describe how your DP will administer ESF across the partnership. (300 words)**

The South East England Development Agency (SEEDA) has overall financial and administrative responsibility for the DP, including administration of ESF.

With support from the European Institute of Social Services, SEEDA will:

- implement a system of financial monitoring in line with ESF requirements
- submit regular financial claims and progress reports to the EQUAL Support Unit.
- implement a system of monitoring beneficiary and policy outcomes in line with ESF requirements
- notify the EQUAL Support Unit of any significant changes to expenditure or project delivery
- ensure that all partners in the DP meet ESF publicity requirements
- implement an evaluation strategy in line with section 12 of this DPA
- implement a dissemination and mainstreaming strategy in line with section 11 of this DPA.
- implement an Equal Opportunities strategy in line with section 7 of this DPA.
- audit the financial reports of all partners.
- ensure that only work that is additional to existing activity is included in financial and activity reports.

Delivery partners will be responsible for their own financial management systems and local implementation of monitoring, evaluation, dissemination and mainstreaming and Equal Opportunities strategies. This will be monitored by SEEDA and EISS.

All partners will provide EISS with information in an appropriate format, and on time, to enable it to prepare regular claims and progress reports for submission by SEEDA to the EQUAL support unit. EISS will support partners in this activity through creating easy-to-use monitoring tools, and providing advice and training on their use.

Section 6: Strategic objectives, outputs and work plan

Your replies in Sections 6 to 13 of the DPA should build on the information you provided in your Action 1 Application Form. They should also reflect, and where appropriate, refer specifically to outcomes from consultation with members of your DP, your target groups, TNG members, policy makers, employers and so on during Action 1. You should also describe what you learned from previous relevant action within your chosen theme, territory or sector.

6.1 Overall aim

Please summarise the overall aim of your DP, making it clear how it fits within the Equal theme you have chosen. (300 words)

At programme level the Partnership has two strategic aims, to;

- model inclusive employment models delivered through independent social enterprises.
- create new protocols for entrepreneurial partnerships between the public, private, voluntary and community sectors,

to be delivered through the following activities:

- Defining macro level regulatory and cultural barriers across the Public, Private and VCS sectors.
- Baseline research – setting the specific entrepreneurial context and sector potential within each pilot service delivery area.
- Pilot action research and enterprise incubation processes with 9 partners, locally and transnationally.
- Partnership model development and issue specific sector guides and protocols on issues such as board structures, executive skills requirements, procurement, asset transfer, endowment funding from grant programmes etc.
- Stage 2 roll out of the partnership model to learning communities. – opportunities to roll out the enterprise partnership model.
- Development of a changemakers social entre and intrapreneurship network.

These activities will contribute to a research process, which will aim to answer two key questions:

- What are the key elements of successful socially entrepreneurial partnerships between the public, private and VCS sectors?
- What barriers to entrepreneurial public service/ public good delivery relationships exist between the public sector and social enterprise?

The research will take place on two levels:

- Sectoral research and review of the roles and potential of each sector at the macro level
- Action research within 9 entrepreneurial partnerships with social aims. These will consist of 3 in the UK who will be assisted through an intensive process of start-up and incubation and be compared to the DP transnational partners, who will be developing similar intensive models of incubation. The aim is to test whether the differing cultural approach and perception of social enterprise in all three countries has a significant effect on their quality and sustainability

Section 6: Strategic objectives, outputs and work plan

6.2 Strategic objectives

Please state the strategic objectives of your DP, making sure they relate to the overall aim in Section 6.1 and that each objective is Specific, Measurable, Achievable, Realistic and Timebound (SMART).

Objective No	
1	To draw on European experience to model inclusive social enterprise incubation and employment models in 3 UK enterprise teams over a 2-year period.
2	To create at least 4 specific guidance protocols on key regulatory issues affecting the success of cross sector partnerships in the South East.
3	To increase the understanding of the role and potential of social enterprise models to deliver inclusive enterprise in at least 3 growth market areas of the region by 2007.
4	To complete an academic analysis on the cultural and organisational barriers to social enterprise development in partnership with the public sector within the south east, by the end of 2007.
5	To encourage the engagement of all sectors in socially entrepreneurial activity in the region through offering at least 8 specific opportunities for cross sector dialogue and networking throughout the course of the programme.
6	To provide cohesion and connection to the wider social enterprise capacity building initiatives in the region through a joined up approach of delivery through the strategic direction of all activities by the South East Regional Social Enterprise partnership.
7	To stimulate start up of new social enterprise in growth markets of the region through working with market focused learning networks and leading them through a process of partnership development arising through the course of the programmes development
8	To empower individuals within 3 enterprise teams from excluded target groups to develop and drive employment and enterprise vehicles that are beneficial to a local community or community of interest

Please state all of your DP's objectives, numbering each one as appropriate. Press *tab* in the last cell of the table to add a new row.

Section 6: Strategic objectives, outputs and work plan**6.3 Action 2 work plan**

Please provide a work plan for Action 2, describing the activities that will help your DP to achieve each strategic objective in Section 6.2.

Objective No:	1		
Activities	Description of activity	Partners responsible	Timeframe
Activity 1	Undertake baseline Research into different models of incubation and inclusive employment across the EU	SEEDA and Skoll	Ongoing to the end of action 2
Activity 2	Identification of 3 enterprises undertaking different methodologies of incubation within Italy and 3 in Poland, definition of joint working evaluation methodology	SEEDA, Skoll and the 3 rd Angle Partners	Completion by end of October 2005
Activity 3	Implementation in the UK of a defined programme of intensive incubation support over the two years of the programme for the 3 enterprise teams	SEEDA, PHA, PCC, HMP Stanford Hill	Ongoing from July 05
Activity 4	Business Incubation and advisors international exchange to compare initiatives	SEEDA, Business Link, DTA, RAISE, SFSE	
Activity 5	Development of guide to incubation from 3 country experiences	SEEDA, Business Link	Completed for dissemination by May 07
Activity 6	Roll out of incubation experience to key business support and facilitation agencies	All partners	May – December 2007

Objective No:	2		
Activities	Description of activity	Partners responsible	Timeframe
Activity 1	Semi structured focus groups with broad range of partnerships considering exit and development from government grant funding base to identify prioritised areas for research	Skoll	Complete by end of July 2005
Activity 2	Agreement of 4 initial protocol guides and baseline review of current procedural experiences from national policy to local implementation levels	Skoll	Completed by October 2005

Objective No:	2		
Activities	Description of activity	Partners responsible	Timeframe
Activity 3	Ongoing research and protocol development phase for first 4 areas	Skoll	1 st round drafts ready for dissemination and testing May 2006
Activity 4	Identification of second tranche of possible guidance notes to be determined from on going action research process with 3 enterprise teams	Skoll and Steering Group	May-June 2006
Activity 5	Second round of protocol guidance developed and 1 st round market tested for usefulness	Skoll	All protocol guides completed by May 2007

Objective No:	3		
Activities	Description of activity	Partners responsible	Timeframe
Activity 1	Development of background market analysis to at least 3 growth markets for social enterprise	SEEDA and Regional Social Enterprise Steering Group Members	End of March 2006
Activity 2	Formalise 3 market based working groups to consider the issues arising from the enterprise teams and research working throughout the south east, i.e. Housing, Economic Development and Regeneration, Environmental	SEEDA, 3 demonstration teams and the members of the regional social enterprise steering group	End of March 2006
Activity 3	Develop recommendations for working groups about the role and potential for the use of inclusive employment practice through social enterprise within their own market area.	SEEDA, demonstration teams and members of the regional social enterprise steering group	June 2006
Activity 4	Assist market development groups to consider the use of resources within their own market areas to stimulate social enterprise through the use of the practical guidance being development in relation to partnership and incubation practice under objectives, 1, 3 and 4		

Objective No:	3		
Activities	Description of activity	Partners responsible	Timeframe
Activity 5	Provide market development groups with opportunities to consider and compare the use of social enterprise within their markets in Italy and Poland through a study tour	SEEDA, market development groups, 3 rd Angle partnership	
Activity 6	Take market development groups (learning networks) through a process of stimulating start up-through the use of the incubation and partnership models and the targeting of local resource to set up enterprises in areas of market need	SEEDA, steering group members	From July 06

Objective No:	4		
Activities	Description of activity	Partners responsible	Timeframe
Activity 1	Literature review into organisational and partnership culture	Skoll	Completed by December 05
Activity 2	Development of case study proforma for ongoing reporting	Skoll	July – ongoing throughout action 2
Activity 3	Implementation of a schedule of interviews with high level policy makers and practioners	Skoll	Starting July 2005- end of programme
Activity 4	Monthly reporting on specific enterprise team progress on partnership delivery	Skoll	Monthly from July 05
Activity 5	Development of academic paper into the cultural and organisational barriers to effective transition from informal cross sector partnerships to social enterprise models	Skoll	Completed by June 2007
Activity 6	Dissemination of UK and transnational cultural barriers report	Skoll	June – December 2007

Objective No:	5		
Activities	Description of activity	Partners responsible	Timeframe
Activity 1	Identify entrepreneurs currently operating within the region within the public, private and voluntary and community sectors	SEEDA, Regional Steering Group and Regional Social Entrepreneurs network	July – October 2005

Objective No:	5		
Activities	Description of activity	Partners responsible	Timeframe
Activity 2	Engage volunteer facilitators from private management consultancy organisations to lead facilitation groups	SEEDA	July - October
Activity 3	Develop programme of cross sector engagement around key markets for the delivery of public goods. Issues for discussion will be identified through the market based learning networks and will be used as an aid to development of social enterprise solutions to key issues	SEEDA, regional social enterprise steering group	By end of December 05
Activity 4	Run at least one, cross sector innovation meeting every 2 months	SEEDA, regional social enterprise steering group	From January 06

Objective No:	6		
Activities	Description of activity	Partners responsible	Timeframe
Activity 1	Ensure that the programme activities of Cultural Shift South East dovetail with the wider implementation programme for social enterprise in the region through operating a joint management structure with other programme deliverers	SEEDA, social enterprise steering group members	From July 05
Activity 2	Ensure that the branding of Cultural Shift South East is coherent with the wider branding of the steering groups activities	SEEDA	From July 05
Activity 3	Undertake at least 2 regional events with the wider partnership over the lifetime of the programme	All steering group meetings	April 06 and April 07
Activity 4	Ensure that the regional website is consistent with the Cultural Shift South East Style	SEEDA	By September 05

Objective No:	7		
Activities	Description of activity	Partners responsible	Timeframe
Activity 1	Provide all enterprise teams with equal opportunities training	SEEDA	July 05
Activity 2	Provide all enterprise teams with a pre-start skills assessment	SEEDA	July 05

Objective No:	7		
Activities	Description of activity	Partners responsible	Timeframe
Activity 3	Provide all enterprise teams with a dedicated fund for target groups to access in order to improve individual skills in a broad range of areas	SEEDA	Ongoing
Activity 4	Provide all enterprise teams with governance training, enabling them to understand the power and management process involved in developing and running an enterprise	SEEDA and demonstration partners	July - December 05
Activity 5	Support all enterprise teams to develop an inclusive employment practice and ethical framework for operation that encompasses all forms of discrimination in the workplace	SEEDA	Completed by March 06
Activity 6	Define empowerment as a key measure of evaluation of the development of each enterprise team, creating a baseline of individual empowerment at the outset of the programme and a continuous assessment of progress of each individual	SEEDA, Skoll, Evaluation partners from the 3 rd Angle	Framework developed for evaluation by October 05
Activity 7	Develop a guide to empowerment through social enterprise as part of the final protocol series for social enterprise practitioners so that lessons can be disseminated beyond the local level	SEEDA, Skoll	By June 07
Activity 8	Provide individual participants from target groups within each enterprise team to participate in cross cultural exchange with one of the other partner countries	SEEDA, all demonstration partners	

Please describe the activities for all of your DP's strategic objectives.

Press *Tab* in the last cell of a table to add a row for an additional activity relating to the same objective and number the additional activities.

Click the **1** toolbar button to add an additional table for activities relating to a different objective and number the additional tables and activities.

Section 6: Strategic objectives, outputs and work plan**6.4 Outputs**

Please state the type and number of outputs you expect, indicating which strategic objectives (listed in Section 6.2), leading principles or other aspects of your DP they will be from. Please also provide a description of each output.

Type of output	Expected numbers	Objectives, leading principles or other aspects of the DP	Description of the output
New or improved promotional methodologies (individuals and employers)	1	objectives 3, 5 mainstreaming transnationality Innovation	Development of a promotional methodology to stimulate marco level market development in new markets for social enterprise
New empowerment or capacity-building methodologies (individuals and organisations)	2	Objective 3, 4, 7 empowerment Innovation	One academic report into successful partnership inputs. One methodology about the ethical framework development process for enterprise teams
New equal opportunity or positive-action measures (individuals and employers)	3	Objective 7	3 case studies of empowerment implementation through social enterprise at the local level
New information and guidance services	1	Objectives 1-7 mainstreaming	Website with connection to all regional cross sector social enterprise support
New learning, training, materials and toolkits	4	Objective 2 Empowerment Mainstreaming Innovation Transnationality	At least 4 protocols to overcome key systemic barriers to social enterprise support and facilitation
New learning or training programmes and curricula	1	Objective 1 Mainstreaming	Guide to incubation processes from the European Union for business advisors and support agencies
New qualifications			
New quality-assurance methodologies: standard setting, accrediting and auditing			
New databases	1	Objective 3,5,6	Data base of entrepreneurs from across the public, private and voluntary and community sectors.
New IT, ICT and multimedia applications			
New networks created	3	Objective 3, 5, 7	At least 3 market specific

Please quote in all correspondence

Type of output		Expected numbers	Objectives, leading principles or other aspects of the DP	Description of the output
			Mainstreaming	cross sector networks to champion enterprise created.
New studies, policy and research reports		1	Objective 4 Mainstreaming Innovation Transnationality	1 Academic research report into the key determinates of cross sectors partnership based development of social enterprise from a transnational context
Jobs	<i>Created</i>	9	Objective 1 Empowerment	3 jobs created for excluded target groups within each enterprise team
	<i>Protected</i>			
New business start-ups		3	Objective 1 Empowerment	3 enterprises established through the support of enterprise teams
New business support materials and approaches		1	Objective 1 mainstreaming	Development of a guide to incubation from the transnational context
New approaches to work-life balance				
Other (please specify here):				

Section 6: Strategic objectives, outputs and work plan**6.5 Added value**

Please explain how ESF support will add value and what additional activities will be funded as a result of ESF support. (300 words)

The work of the Cultural Shift DP will add value on a number of levels:

- The enterprises will be robust businesses able to operate outside of government support in the provision of services and inclusive employment, thus providing sustainable local employment.
- The transnational relationships developed through the design, set up and evaluation stages will develop the understanding of international markets and enable the identification of business growth and diversification strategies, to enable the sustainability of the enterprises in question and the whole market for social enterprise growth in the region.
- The models developed will enable more efficient service design, empowering public sector employees, social entrepreneurs, and excluded communities to find sustainable mechanisms to break down exclusionary barriers.

The activities of the Cultural Shift DP go beyond those that could otherwise be carried out including:

- Baseline research – setting the specific entrepreneurial context and sector potential within each pilot service delivery area.
- Enterprise Development – pilot action research and enterprise incubation processes with local and transnational partnerships.
- Partnership model development and specific sector guides and protocols on issues such as board structures, executive skills requirements, procurement, asset transfer, endowment funding from grant programmes etc.
- Roll out of the partnership model to learning communities (networks of local and regional stakeholders)
- Development of a changemakers social entre and intrapreneurship network.

These activities will contribute to a research process, which will aim to answer two key questions:

- What are the key elements of successful socially entrepreneurial partnerships between the public, private and VCS sectors?
- What barriers to entrepreneurial public service/ public goods delivery relationships exist between the public sector and social enterprise?

Without the ESF support, the work would have lacked impetus, drive, or direction, thus, would not have been developed, under existing resources.

6.6 Assumptions, risks and flexibilities

Please describe the assumptions, risks and flexibilities that you have taken into account when developing your DP's Action 2 work plan. (300 words)

The South East has many issues to face in the development and stimulation of social enterprise. There is a risk that fractured support structures limit the start-up and sustainability of social enterprises operating in the South East.

The Cultural Shift programme has been designed with the clear understanding of the current barriers to start-up and sustainability in the region. The assumption is that the DP will be in a position to address a more intangible barrier that, if overcome, will enable the greater use of the social enterprise model. The barrier relates to the relationships between the public, private and voluntary and community sectors and their respective roles on the operation, facilitation, and support for social enterprises.

The Cultural Shift partnership operates on two basic assumptions:

there is a problematic divergence in value systems, specifically relating to the interpretation of and appropriate use of both 'social good' and 'enterprise culture' exists not only within organisations but also between these sectors as a whole.

If working effectively, social enterprise and entrepreneurship will benefit from partnership working with the public, private and VCS sectors. Each sector has something significant to bring to the sustainable delivery of public goods and services through social enterprise.

Using resources available to the DP across the partnership, it will identify where cultural barriers exist, through policy, systems, and the actions of key gatekeepers within organisations, and will map out methods to overcome these barriers. The evaluation framework of monitoring and review of the work of the partnership will allow the DP the flexibility to address associated risks within the partnership as it develops.

Section 7: Leading principle - equal opportunities**7.1 Summary of equal opportunities**

Please provide a summary of your DP's approach to equal opportunities, indicating the main aspects of your DP's Equal Opportunities Policy attached at Annex 4. (400 words)

Each Social Enterprise within the Partnership, in consultation with target groups, has developed their own EO Policies and Implementation Plans following reviews of existing Partners EO Policies and best practice.

Social Enterprise Partners are required to consider and incorporate the EO Policy into, design, development, implementation, monitoring, evaluation, dissemination activities.

SEEDA has developed an overarching EO Policy based on its own policy, including measures to tackle gender, sexual orientation, disability, race, age, marital status, religion, colour, ethnic and national origin discrimination.

SEEDA will ensure the effective implementation of the EO Implementation Plan and have direct monitoring support from its equalities and diversity policy development lead that will provide an audit of equalities processes and procedures.

It will co-ordinate the activities of the Partnership from a strategic level, each Enterprise Board having responsibility for the oversight of management and monitoring within its own activities, reporting to the Partnership at bi-monthly innovation meetings on progress and monitoring of Diversity and Empowerment. To assist this, each local Enterprise Team will identify an Equalities & Diversity Champion having responsibility for driving the EO agenda within that Enterprise Team.

The EO strategy will be amended, and developed, in the light of continuous review and assessment.

The DP has adopted the Equality Standard for Local Government, as adapted for Equal, and aims to achieve Level 5 of this standard by end of Action 2.

Each Social Enterprise's EO Policy will apply equally to all members of that Social Enterprise to be promoted at:

- recruitment stage
- partnership development days
- focus group meetings
- Enterprise Board meetings
- other project activities.

Regular EO reports will be provided to the DP Management Board and appropriate action recommended.

The DP's Equalities Adviser will provide updates on existing and forthcoming anti-discrimination legislation where required, and equal opportunities best practice, and assist in the monitoring and review of the DP's Equality strategy.

Barriers experienced by the Project's target beneficiaries will be overcome:

1. Strategically - by the development of sustainable and flexible enterprise models and practice, that will mainstream measures for all excluded groups into policy development developed by the Project, which will have the ability to respond to changing markets and economic conditions.
2. Locally – through the direct provision of employment and volunteering opportunities to excluded groups through the 3 Local Enterprise teams.
Employment conditions will consider identified barriers in the enterprise design and delivery stages.

Section 7: Leading principle - equal opportunities**7.2 Implementation strategy for equal opportunities**

Please provide an implementation strategy for equal opportunities, demonstrating how your DP will put the Equal Opportunities Policy (attached at Annex 4) into practice.

Objectives, leading principles or other aspects of the DP	Current position	Results required or targets set	Timeframe	Key indicators and source documentation
Objective 1	Being developed	To ensure that each new Enterprise team establishes a comprehensive and relevant equal opportunities strategy	1.7.05 – 31.12.05	Equal Opportunities Policy, Codes of Practice, monitoring procedures and evaluation reports.
Objective 2	Being developed	To ensure that all protocols include a commitment to equality and diversity issues	1.7.05 – 30.6.07	Protocols include equality and diversity requirements. Procurement contracts include equal opportunity clauses Equality Impact Assessments
Objective 3	Being developed	To empower individuals within 3 enterprise teams from excluded target groups to develop and drive employment and enterprise vehicles that are beneficial to a local community or community of interest	1.7.05 – 30.6.07	
1. EO. Management				
1.1 DP Management Group	Established and holding regular meetings.	Regular Reports on progress of EO Strategy and review/evaluation of EO Policy & Implementation		Documentation of meetings and action plans EO Working Group minutes
1.2 Equal Opportunities Working Group	EO Group to be formed - made up of Cultural Shift Partners and Beneficiaries/representatives	Numbers and diversity of beneficiaries involved - targets met (targets to be set by EO Group at first meeting).		Meeting minutes, Beneficiary feedback, on-going monitoring/evaluation EO survey

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	from disadvantaged groups			
1.3 Compliance of Partnership with current equality legislation and EO best practice	All EO Policy and Strategy documentation has been drafted to comply with current legislation and best practice.	Positive influence of CRE, EOC and DRC on management of partnership Regular reports to Management Board by EO Group on legislative and best practice developments	Ongoing Action 2	Minutes and management reports Equality Standard Audit Self Assessment by Partners EO Survey
2. Design of CULTURAL SHIFT Policy				
2.1 All Partners will have EO Policies in place	To be established by EO Group at beginning of Action 2	Achievement of EO policies in place / confirmation evidenced in hard copy	By September 2005	Monitoring/evaluation EO survey
3. Promotion of Policy				
3.1 Engagement of diverse disadvantaged groups	Initial Baseline to be established of staff and beneficiaries at beginning of Action 2	Engagement of beneficiaries in monitoring and evaluation Diversity of languages used where appropriate Provision of applications which enable disadvantaged groups to engage e.g audio, large print	Initial Baseline By July 2005 Ongoing monitoring of progress during Action 2	Monitoring involvement On-going evaluation EO Working Group feedback
3.2 Promotion of Partnership to potential Beneficiaries from ethnic communities	To be developed during Action 2 by EO Group	Partnership promotional material in commonly spoken ethnic languages Use of interpreters where appropriate Increase in beneficiary engagement/membership of these groups within Cultural	Ongoing Action 2	EO Working Group feedback/minutes Monitoring EO survey

		Shift Achievements in target numbers		
3.3 Positive images of ethnic minority and other disadvantaged groups in project publicity/promotional material	To be established by EO Group in Action 2	Reflected in Beneficiary membership of DP Evidenced in range of promotional material/DP web-site Use of positive examples of achievement by participants of minority background Inclusion of positive pictures and pieces in all relevant material	Ongoing Action 2	EO Working Group reviews, Beneficiary feedback, DP monitoring independent evaluation against aims File of publicity/promotional material
3.4 Involvement of disadvantaged people with multiplicity of needs in management/evaluation of the Partnership	Initial Baseline to be established at beginning of Action 2	Evidenced proportionate/balanced representation in management/evaluation processes (Specific Targets to be set once initial baseline established) Incorporate designs of measures that enable involvement of these groups: e.g Large Print/Ensure physical access at meetings/ Use of interpreters. Ensure balanced representation of gender/minority groups/ethnic minority groups Ensure specific training e.g	By July 2005	Monitoring Beneficiary Feedback EO Group Reviews EO survey

		meeting facilitation		
3.5 Over representation of disadvantaged groups	To be established by EO Group in Action 2	Active encouragement through promotion and recruitment Evidenced/Perceived by Staff and Beneficiaries	Ongoing Action 2	EO Working Group feedback - Monitoring and Evaluation against set targets/objectives
4. Implementation of EO Policy				
4.1 Communication of EO Policy to all staff & Beneficiaries	EO Policy and Implementation Plan currently being reviewed by DP Management Board	Specific training events/workshops including all partners and employers to attend EO training event Relevant literature/information posted on Partnership web-site Printed/taped copies where appropriate Verbal account of content Evidenced by attendance at training events of all Partnership members In place as integral element of induction processes	Ongoing Action 2	Monitoring of training/induction EO Working Group feedback Evaluation EO survey Raised awareness amongst Partners/Staff and Beneficiaries of EO Policy
4.2 Partners to ensure additional support to disadvantaged beneficiaries re EO Policy implementation and monitoring	Current position to be ascertained by Partners in Equality Standard Self-Assessment at beginning of Action 2	As above	Ongoing development – Action 2	Records of Partners Self-Assessments EO Group Meetings Management Board Meetings
4.5 Consultations with Beneficiaries about individual needs;	To commence in Action 2	Consultations to be integral to assessment and induction processes	Ongoing Action 2	EO Working Group feedback to Management Group Monitoring and evaluation against

usability and accessibility to services		Provision of specific activities/meetings		aims and objectives Beneficiary feedback satisfaction exercises
4.7 Provision of services ensuring full participation of people with disabilities	EO Group to review on commencement of Action 2	<p>All Partners to be familiar with and implement the DRC's Guide to Venue Accessibility and other relevant guidance as disseminated by the EO Group.</p> <p>All provision complies with multi-needs of those involved in the Partnership</p> <p>High level of individual satisfaction</p> <p>Partnership to ensure equal access to meetings/venues/use of visual and audio aids</p> <p>Needs of people identified through assessment and induction processes</p>	Ongoing Action 2	<p>EO Working Group standing agenda item</p> <p>Records of dissemination by EO Group of best practice</p> <p>Beneficiary feedback</p> <p>Monitoring and evaluation of Partnership</p>
5. Monitoring/Targets				
5.1 Ensure accessibility and usability of services for diverse communities of interest.	Ongoing aim of DP Management Board and Partners will be required to commit to objective for Action 2 delivery	<p>Diverse communities of interest represented. Specific references to disadvantaged groups in all Partnership policy/decision communications</p> <p>Apply policy of positive selection for involvement for disadvantaged groups</p>	Ongoing reviews Action 2	<p>Monitoring/evaluation</p> <p>EO Working Group feedback</p> <p>EO survey</p>

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<p>5.2 Provision by Partners of regular monitoring information</p>	<p>To commence in Action 2</p>	<p>Up to date data base/monitoring systems Consistent use of common purpose monitoring tools throughout Establishment of Equal Opps Working Group</p>	<p>Ongoing Action 2</p>	<p>Monitoring/evaluation reports/reviews Management Group minutes</p>
<p>5.3 Adherence to EQUALITY STANDARD FOR LOCAL GOVT</p>	<p>To be developed during Action 2</p>	<p>All Partners to achieve minimum Level 2 and to aim to progress to Level 5 throughout partnership Regular briefing to partners, reviews and application of EQUALITY STANDARD on Review of Partner Organisation EO Policies</p>	<p>Ongoing Action 2</p>	<p>EO Working Group reviews Records of Partners initial self-assessments Monitoring and evaluation exercises Management Meeting Minutes</p>
<p>5.4 Measurement of access and achievements of disadvantaged groups</p>		<p>Perceived or identified achievements against expectations Barriers identified and resolved Monitor out-comes against targets Assessment processes/reviews Highlight and resolve barriers when identified</p>		<p>EO Group Meeting Minutes/Reports to Management Board Beneficiary Feedback – EO Survey Evaluation</p>
<p>6. Recruitment</p>				
<p>6.1 Ensure compliance</p>	<p>To be reviewed by EO Group at</p>	<p>Evidenced in practice</p>	<p>Ongoing Action 2</p>	<p>Monitoring</p>

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with current Legislation and in line with best practice	beginning of Action 2	All Partners to have awareness/information Training/workshop in-put to all concerned during project life		EO Group Meeting Minutes Evaluation report EO survey
6.2 Active encouragement of disadvantaged group involvement in management	To be reviewed by EO Group	Positive encouragement through advertising/preparation through training - on-going individual support - appropriate measures e.g visual/audio aids balance of gender	Ongoing Action 2	Evidenced in practice Beneficiary + staff feedback Monitoring Evaluation report EO survey
6.3 Monitoring of pay levels/ opportunities for promotion and professional development of staff	To be established by EO Group in Action 2	Partners to implement within own organisation and Partnership as a whole to review regularly + internal monitoring/staff supervision		Expressed/perceived satisfaction Evidenced in practice demonstrated by internal monitoring EO Group Meeting Minutes Monitoring Evaluation EO section
7. Complaints				
7.1 Project Complaint & Grievance procedure	To be drafted by commencement of Action 2	To be approved by Management Board for commencement of Action 2 To be communicated to all Partners, Staff and Beneficiaries in relevant formats Highlighted in job descriptions/referral/ application forms/staff notices/training courses	Ongoing Action 2	Evidenced in action EO Group Meeting Review Monitoring reviews Evaluation - EO section

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7.2 Procedure design	To be commenced	<p>Procedure agreed and adopted by commencement Action 2</p> <p>Procedure publicised as core working document - integral part of induction/post assessment process</p> <p>All Partners will contribute to design and adoption of key policy document</p>	<p>Agreement of procedure and adoption by commencement Action 2</p> <p>Ongoing Action 2</p>	<p>EO monitoring reviews</p> <p>Evaluation</p>
8. Policy Impact				
8.1 Communication of lessons learnt	Ongoing	<p>Specific references to disadvantaged groups in all policy-relevant communications</p> <p>All messages to policy-makers to include specific references to the needs and achievement of disadvantaged groups</p>	Ongoing Action 2 and Action 3	<p>Home Office Equality Impact Assessments</p> <p>Policy reports</p> <p>Evaluation</p>
9. Evaluation				
9.1 Partnership evaluation	Ongoing Action 2	<p>Section of evaluation report on equal opportunity impact</p> <p>Evaluation to include specific evaluation of the equal opportunity impact of the partnership</p>	End of Action 2	Evaluation report

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Please provide the information for all of your DP's strategic objectives in Section 6.2, as well as any other leading principles or aspects of your DP. Number each one as appropriate. Press *Tab* in the last cell of the table to add a row for an additional objective, leading principle or other aspect.

7.3 You should include a copy of your DP's Equal Opportunities Policy at Annex 4.

Please confirm that your Equal Opportunities Policy is included at Annex 4 (please type an X in the box).

X

Section 8: Leading principle - innovation**8.1 Summary of innovation**

Please summarise the main ways in which your DP is innovative, referring to your Equal theme and the leading principles of Equal. (400 words)

The work of Cultural Shift is innovative in process, context and goal orientation

Process Oriented Innovations.

The core aim of the partnership is to achieve process innovations in how public service agencies engage and support social enterprise. The major innovation of the partnership will be to establish a model of multi stakeholder participative support and design of inclusive employment, through social enterprise models.

Working with excluded groups and transnational partners, the DP will develop new approaches to the application of inclusive employment models within specific service areas.

Goal Oriented Innovations

The DP will work with national, regional and local stakeholders to create specific protocols on key themes including, asset transfer (for local and regional agencies) procurement practice, state aid legislation, community and service user engagement, supply chain brokerage etc. Wherever possible these tools will be sector specific, giving them guidance on what is possible, legal and advisable.

The use of these regulatory and cultural protocols will open up new possibilities for inclusive employment opportunities by widening the market possibilities for social enterprises. Training in the use of products will be offered to key stakeholders. Stakeholders will be monitored to measure the rate of implementation and subsequent outcomes. Innovation will be sustained through ongoing review and amendment of the tools to ensure they continue to provide appropriate support.

Context Oriented Innovations

The DP will begin to evolve a regional policy framework for the development of social enterprise in partnership with mainstream service providers. The partnership will also begin to widen the regional market for social enterprise products and services, branching out into transnational partnership approaches and emerging international markets.

Section 8: Leading principle - innovation**8.2 Innovation in detail**

Please describe the main innovations of your DP in more detail, indicating the type and level of innovation, and which strategic objectives, leading principles or other aspects of your DP they relate to.

Innovation	Description of innovation	Type of innovation (process, goal or context)	Level of innovation (European, national, regional or local)	Objectives, leading principles or other aspects of the DP
Innovation 1	Establishment of a model of multi stakeholder participative support and design of inclusive employment, through social enterprise models.	Process	Regional/national	Empowerment/Equal Opps
Innovation 2	Development of new approaches to the application of inclusive employment models within specific service areas.	Process	Regional/national/transnational	Equal Opps/Empowerment
Innovation 3	Creation of protocol on key theme: asset transfer	Goal	National/regional/local	
Innovation 4	Creation of protocol on key theme: Procurement practice	Goal	National/regional/local	
Innovation 5	Creation of protocol on key theme: state aid legislation	Goal	National/regional/local	
Innovation 6	Evolvement of a regional policy framework for the development of social enterprise in partnership with mainstream service providers.	Context	Regional	Mainstreaming
Innovation 7	Widen the regional market for social enterprise products and services, branching out into transnational partnership	Context	Regional/transnational	

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	approaches and emerging international market			
Innovation 8	Development of academic research into the transitionally development of social enterprise from existing partnership based relationships with the public and private sectors.	Context	Regional/ National / International	Empowerment/ mainstreaming

Please repeat the information for **all** of your DP's innovations, numbering each one as appropriate. Press Tab in the last cell of the table to add a row for an additional innovation.

Section 8: Leading principle - innovation**8.3 Support for innovation**

Please support your claims for each innovation in Section 8.2 by describing the current baseline position, underpinning evidence and key audiences.

Innovations (from Section 8.2)	Current position	Evidence	Audience
Innovation 1	Multi stakeholder models do exist within the social enterprise realm (largely arising from the co-operative movement) However there is little if no guidance for overcoming the issues of the power imbalance that arises where social enterprise is being developed from a partnership of cross sector agencies (often with a historical past of grant funding between two or more partners) Also the key issues of building in an ethical framework of participation, especially for community business often takes place on an ad hoc basis rather than being a defined stage of business planning and development for partnerships transitioning from informal and unstructured relationships to formal and transactional relationships	Evidence can be seen in the way that many social enterprises originating from partnership structures that have delivered grant programmes in the past often face considerable conflict in the development stages as the power relationship changes. This often manifests itself in struggles to release assets, lack of clarity about decision making powers in governance structures and a replication of grant based monitoring and reporting requirements that are inappropriate for an entrepreneurial setting.	The guidance coming out of this innovation will be targeted at the middle management level of the public sector and social enterprise partnerships. The aim is to provide a practical guide to the grass roots facilitators and investors in social enterprise to make the transition from grant based to entrepreneurial based relationships as easy as possible. Regional and national policy makers
Innovation 2	The use of inclusive employment practice within social enterprise and indeed all models of employment is currently relatively ad hoc. The development of clear guidance about how to engage in inclusive	Social enterprise is a term that covers many forms of enterprise with a variety of interpretations of the concept of social good. Some forms of social enterprise exist specifically to promote inclusive	Social enterprises and policy makers at all levels

	employment practice even when it is not the core business of the social enterprise will support a stronger ethical framework for all social enterprises.	employment practice (Social Firms for example) while other may have a social aim such as environmental protection that has no direct correlation to the principles of inclusion. The aim of this innovation is to provide an easy way for social enterprises across the board to understand that inclusive employment should be part of the delivery approach of all social enterprises not just those that exist to promote economic inclusion.	
Innovation 3	The concept of asset transfer is currently poorly understood at all levels of government. The ability to transfer assets without having to incur the cost of disposal at market rates is one of the main hindrances of social enterprises delivering key local goods and services. Legislation is currently changing to try to make this process easier with greater flexibility for the accountable bodies of assets to use them appropriately but little is known within the public and VCS sectors about how to transfer assets in the most appropriate and flexible ways to secure the long term viability of social enterprise deliverers	Approaches to asset transfer within the South East are completely fragmented with little clear guidance for managers within social enterprises and transferring bodies on how to approach transfer effectively. This is resulting in a great deal of confusion about how to interpret central government guidance and hindering the transition of social enterprises to be more independent and flexible in their use of their asset base for the good of their company	Social Enterprises, public sector workers, Policy makers at regional and national level
Innovation 4	Procurement with public and private organisations provides one of the greatest means by which to stimulate a sustainable market for social enterprises, however	The tendering processes for the provision of goods and services to public bodies is very opaque. Local Authorities in particular do often not have a transparent process in	Social enterprises, public procurement officers, policy makers at the local, regional, and national levels.

	<p>knowledge within social enterprises of how to approach the tendering process is fragmented across the region. The skills sets required to develop grant applications is very different from those that are required in the tendering process. In addition, the public sector are currently unclear in a universal sense about how to interpret European procurement legislation. This innovation will provide guidance and training for social enterprises wishing to develop formal tenders as well as informing the public sector on the broader interpretations possible through European legislation.</p>	<p>place to guide new entrants to the market with regard to how to identify contracting opportunities. Social enterprises are also currently ill equipped to take on the financial and administrative burden of going through the tendering process which is evident by the limited number of social enterprises bidding for and winning public contracts in the region. Guidance does exist but often does not address both sides of the procurement world. This will be a short and easy to understand check list of the considerations to make when considering tendering for work or when procurement officers are facing decisions about potential contractors from the social enterprise realm.</p>	
<p>Innovation 5</p>	<p>State aid legislation is another poorly understood area of legislation from the EU. Fears of contravening state aid currently seriously inhibit the use of regional, local and national programme investment into social enterprise. This guide will provide practical guidance with case studies for those policy makers and managers that have a role to play in investing in social enterprise. It will also aim to highlight some of the confusing interpretations across government departments and encourage policy makers to be consistent in their messages on state aid.</p>	<p>This confused situation is evidenced by the administrative burdens placed on programme deliverers of social enterprise grant funding (such as ESF, EQUAL) etc to avoid state aid, compared to the large scale investment and support given to the private sector (i.e. MG Rover) which has a confusing and contradictory message about what is possible or permissible under state aid legislation. The levels of interpretation of the extent to which state aid is really an inhibitor of social enterprise is evidenced by the different limitations placed on social enterprise and inclusion programmes</p>	<p>Policy makers at all levels and social enterprises</p>

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		across the member states (with some member states simply exempting certain types of investment from state aid legislation)	
Innovation 6			
Innovation 7			
Innovation 8			
Innovation 9			

Please provide the information for all of your DP's innovations in Section 8.2, numbering each one as appropriate. Press *Tab* in the last cell of the table to add a row for an innovation.

Section 9: Leading principle - empowerment**9.1 Summary of empowerment**

Please summarise the main ways in which your DP will empower the target groups identified in Section 4.2 and the partners named in Annex 1 in your DP. (400 words)

Empowerment for excluded individuals will take place through direct and indirect mechanisms during Action 2 & 3. Approaches to empowerment will build on the outcomes of the implementation of the partnerships equal opportunities policy. It will also build on the extensive previous experience of the core partners in designing empowerment measures throughout consultation and development activities.

Providing a baseline of personal and organisational capacity has been a key action for action 1 and will be a core theme in the continuous evaluation of the theme.

Representatives from excluded groups have been recruited onto enterprise boards during action 1. The process of defining and agreeing stakeholder roles and expectations at the local and strategic level ensures equality of representation. Support to these representatives includes:

- paying for travel and subsistence
- establishing codes of non jargon based language use
- specific training measures etc.

Involvement of excluded groups within enterprise boards will ensure clear lines of involvement and input into employment support design of each enterprise. This process will also empower individuals to understand government structures and business development principles more effectively.

The operational phases of each enterprise during action 2 will lead to individual empowerment through the operation of employment support, to include:

- personal confidence building of excluded individuals, within a supportive work environment
- access to skills
- personal development.

Opportunities for transnational experiences for community representatives have also been built into action 2, to build personal confidence and raise expectations and capacity to develop business and interpersonal skills.

During Action 3, the research and policy outputs developed under actions 1 and 2 will lead to indirect empowerment across the excluded communities of the region by encouraging similar methods of engagement and support in project design and delivery.

Section 9: Leading principle - empowerment

9.2 Empowerment in detail

Please describe your DP's empowerment activities in detail, indicating which strategic objectives, leading principles or other aspects of your DP they relate to.

Types of empowerment	Description of activities
<p>Promoting individual empowerment</p>	<p>Individual participants from target excluded groups will be empowered through four mechanisms:</p> <p>(1) Participation in the enterprise and governance training. Individuals will be offered a personal skills assessment and provided with training bursaries to address any skills gaps identified.</p> <p>(2) Participation in the design and development process of the enterprises themselves, which aims to provide better services for beneficiaries through providing a beneficiary perspective to employment and service delivery. This links to the innovation theme of EQUAL.</p> <p>(3) Participation in transnational exchanges with other beneficiary and social enterprise groups in Italy and Poland. Beneficiaries will be empowered through accessing opportunities for international travel and learning that would not otherwise be available to them. This links to the transnational theme EQUAL.</p> <p>(4) Participation in dissemination through creative presentations on the beneficiary perspective of the process. Individuals will be assisted to compile personal perspectives that they will present to policy makers and other practitioners during regional conferences on social enterprise. This will link to the mainstreaming theme of EQUAL.</p> <p>The overall focus of individual empowerment activities will be equality of opportunity</p>
<p>Developing collective responsibility and capacity for action</p>	<p>The process of cross sector collaboration within enterprise teams will build collective responsibility for the outcomes that each enterprise team will seek to implement. The mapping and research process that enterprise teams will undertake will provide a blue print for future cross sector collaboration and ownership of social enterprise solutions. The research process will be used in year 2 of action 2 to stimulate further enterprise teams by using the 3 demonstration projects as pilot examples.</p> <p>The wider process of providing means to overcome key regulatory barriers to social enterprise start up and support will also feed into the ability of the whole sector in the region to have the right knowledge and capacity to make cross sector partnerships successful in the longer term. The fact that Cultural Shift South East has the same steering group as the wider regional social enterprise strategy implementation group will mean that the activities of the programme truly will create added value in the joint ownership of social enterprise market development. This activity will feed into the innovation and mainstreaming themes of EQUAL.</p>
<p>Taking part in designing DP activity</p>	<p>The overall programme has been designed to allow innovation and influence from enterprise teams and the regional steering group to take place as the outcomes of the programme evolve. Activities such as innovation meetings that will be held quarterly and will be the focus of engagement of key policy makers and practitioners. The content and approach of these innovation meetings will be decided by the steering group as a result of the ongoing assessment and findings at the transnational and UK level, working with key incubation and market</p>

Types of empowerment	Description of activities
	<p>development issues to ensure that they are as relevant and action focused as possible. The continuous evaluation process that has been built into the action research element of the programme also allows flexibility to change the level and type of support to enterprise teams as appropriate. A benchmarking process working with key partners in action 1 will also be used as a key starting point for stimulating sector specific cultural change. Local social entrepreneurs are the changemakers in this process so they will be supported to develop cultural change activities best suited to their own organisations. The programme itself forms a framework for cultural change can be tailored to meet the specific needs of individuals and organisations. This links to the innovation and mainstreaming themes of EQUAL</p>
<p>Taking part in running and evaluating activities in Action 2</p>	<p>The enterprise teams will be responsible for the management and development of their individual projects, they will be supported with enterprise skills training throughout this process and will undergo a process of continuous assessment and evaluation by both Oxford University and the external evaluators of the programme. The action research element of the programme has two purposes, to track the experience of development and to allow for continuous feedback from participants. Quarterly DP meetings and reports from the researcher will allow feedback to be fed into the steering group. This feeds into the innovation theme. Wider participants in the learning networks and social entrepreneurs mentoring activities will essentially set their own agenda of activities as they learn in cross sector settings.</p>
<p>Changing the attitudes and behaviour of people who are important to the DP</p>	<p>The whole purpose of this process is to engage changemakers within sectors to influence policy of organisations with a market generation function in the public and private sectors. The process of providing changemakers with enterprise skills and the policy and practical tools to overcome systemic barriers to the use of social enterprise solutions will enable employees within organisations to stimulate the cultural change necessary to ensure that demand for social enterprise solutions continues to grow. Innovation meetings will provide policy makers and practitioners the opportunity to engage in difficult discussions around systemically rooted policy and seek to find joint methods to overcome the real and perceived barriers. By working with key regional agencies such as the National Housing Federation we aim to influence both local policy implementation and national priorities of powerful organisations. This will be supported through the production of practical guides and policy documentation feeding into a number of key, influential agencies activities such as SEEDA, GOSE etc. This element of empowerment also forms part of the mainstreaming and innovation priorities of the wider EQUAL programme.</p>
<p>Taking part in disseminating outcomes</p>	<p>All partners and beneficiaries of the programme will be involved in a broad process of dissemination including presentations within their own organisation, sector specific influencing events, regional conferences and the final UK and transnational conferences. Beneficiaries will be supported to express their experiences a number of creative media. The perspectives of the beneficiaries will be particularly important to the dissemination of information on the role of Equal opportunities in the design of inclusive employment. This will feed into the mainstreaming and equal opportunities themes of EQUAL.</p>

Section 9: Leading Principle - empowerment**9.3 Benefits of empowerment**

Please explain how you would expect the target groups and partners to continue to benefit after your DP activities have ended. (300 words)

The Cultural Shift DP target groups are recognised by the social exclusion unit as hard to integrate through traditional employment measures, and as facing multiple barriers to employment.

The DP will work with:

- Refugees
- Ex-offenders
- People addicted to drugs and alcohol
- People with disabilities (physical and learning)
- People disadvantaged through education
- People disadvantaged by geographical location
- People with care responsibilities

Empowerment for all will be achieved through participation in the learning processes, access to employment opportunities, and dissemination of successful intervention models throughout regional policy.

As a result of successful engagement in these processes, and of having more control over decisions which affect positive development, beneficiaries will gain an increase in personal qualities, for example, increased confidence and knowledge.

The DP will further benefit through skills development, and as a direct out-come of involvement in developing models of intervention to ensure that they are accessible and relevant to specific needs.

Development of these qualities will positively impact on the long term well-being and motivation of the target groups, and on achievement of their over-all employment aims.

The intention of the Cultural Shift is to mainstream the work of the DP, with a long term advantage to ensuring that beneficiaries and other stakeholders continue to benefit, beyond the end of the DP's activities.

This will be achieved within initiatives that have empowerment as one of the central approaches of access to a sustainable employment position. The longest-term gain will be to the economy and to the social economy. Organisations will benefit from capacity building, both locally, and transnationally.

Section 10: Leading principle - transnationality

The information provided in this section must be consistent with the information you have provided in the Transnational Co-operation Agreement (TCA). You should briefly summarise the information you provided in the TCA. Please list all your transnational partners that will join your Transnational Partnership during Action 2 in Annex 2.

10.1 Summary of transnational objectives

Please summarise the objectives of your TCA, indicating how they will help your DP to meet its domestic objectives and how they will add value to your DP's Action 2 work plan. (400 words)

The Cultural Shift South East is working with partners in Italy and Poland.

There are three primary transnational objectives:

1. to test models of developing and incubating sustainable social enterprises - this objective is designed to widen the range of models and learn from the expertise in partner countries which operate from a different historical and cultural perspective.
2. influencing organisational culture in the public, private and voluntary and community sectors - this objective reflects the different attitudinal and organisational barriers which exist in different partner countries.
3. Parallel research based on a common framework to identify success factors - this objective intends to explore the different cultures in which the social economy sector operates and the political and environmental support structures needed to promote an entrepreneurial approach to the social economy.

Each of the partners is developing different models of social enterprise or building capacity within the social economy sector. The added value of the transnational activity will be in the parallel research, transferring, testing and adapting different approaches and support mechanisms. A shared understanding of the historical and cultural development of social enterprise in each of the partner countries will assist each to influence the perceptions of public and private sector organisations.

The partnership will explore issues at macro, mezzo and micro levels and, through the research framework, provide an analysis of the current relationships between the public, private and voluntary sectors and the social economy in each partner country.

The opportunity for exchanges of social entrepreneurs, mentors and researchers will transfer new ideas, alternative models of sustainable development and expertise to each transnational partner.

Section 10: Leading principle - transnationality**10.2 Summary of transnational activities**

Please summarise your DP's transnational activities, indicating how important various levels of transnationality are. Mark on a scale of 0 (no importance) to 4 (very important).

Levels of transnationality	Degree of importance	Description of transnational activities
Exchange of information and experience	4	study visits/shared learning events
Parallel development of innovative approaches	4	parallel audit/survey of public and private sector attitudes, training needs analysis for social entrepreneurs
Import, export or adoption of new approaches and their adaptation	3	study visits/testing and adapting alternative models
Joint development	4	designing a strategic framework to influence sector cultures
Exchange of trainees, trainers and staff	4	exchanges/ study visits by social entrepreneurs, business mentors, participants

Section 10: Leading principle - transnationality**10.3 Transnational meetings**

Please indicate the number of transnational meetings your DP expects to attend.

	2005	2006	2007	Total
Expected number of transnational meetings	2	2	2	6

10.4 Transnational management and resources

Please describe how your DP will manage and resource its transnational activity. (300 words)

The Cultural Shift South East will work with the European Institute of Social Services to ensure that all partners have to opportunity to participate in, and learn from, the transnational activities.

The Cultural Shift South East Project Director and the Transnational Co-ordinator will represent the DP on the Transnational Steering Group, which will meet every 6 months to monitor activities against the transnational workplan.

There will be 3 Transnational Working Groups (TWG), linked directly to the transnational objectives, with a nominated transnational partner taking responsibility for each TWG. The Cultural Shift South East has responsibility for the second TWG - Influencing organisational cultures in the public, private and voluntary/community sectors.

The transnational budget has been allocated to the different activities, and has been designed to offer maximum flexibility and opportunity for all partners to participate.

Section 11: Leading principle - mainstreaming**11.1 Potential for mainstreaming****Please describe your DP's potential for mainstreaming. (300 words)**

Each Cultural Shift enterprise team will partner with a local and a regional public service agency and proactively promote the participation of excluded communities in the mainstreaming process. Through SEEDAs facilitation of the wider regional social enterprise partnership, it will be a key mechanism of mainstreaming across its constituent partners.

It will use the findings of its research to feed into, The Social Enterprise Unit, the DTI, The Social Enterprise Coalition, other Regional development agencies, and the Small Business Service
Key audiences for dissemination will include:

- Registered Social Landlords/other housing providers through via involvement of Portsmouth Housing Association and The National Housing Association.
- Regional Action & Involvement South East (RAISE), through development of ICT services for the VCS and linkage with Futurebuilders.
- Regional City and County Councils through involvement of Portsmouth City Council.
- The Prison and Probation service through involvement of HMP Standford.
- The South East European Social Policy Reference Group
- Corporate Social Responsibility practioners through SEEDAs lead RDA CSR role.

Mechanisms for dissemination:

- Policy reports
- development of practice protocols with key service providers
- Sectorally based networking opportunities, particularly with other Theme D DP's
- Local and sub regional social enterprise strategies flowing from the regional strategy.
- Formal policy feedback mechanisms with the DTI/other policy agencies

Anticipated mainstreaming outcomes, to be disseminated/promoted nationally and transnationally:

- Inclusion of policy outcomes in the South East Social Enterprise Strategy
- Policy and practice implementation within national and regional housing, waste, employment and economic development strategies.
- Take up of partnership protocols an by social enterprises and mainstream service employees at the regional, national and transnational level.

11.2 Potential for mainstreaming equal opportunities**Please describe your DP's potential for mainstreaming equal opportunities outcomes into policy or practice. (300 words)**

The Cultural Shift DP is committed to genuine application of its' Equal Opportunities involvement of project beneficiaries in the design, activity, and evaluation of the DP which will emphasise the value of involvement of beneficiaries, specifically, in the development and design of enterprise and employment models. The involvement of beneficiaries will inevitably influence the mainstreaming impact, nationally and transnationally.

Future mainstream development will be informed by its' evaluation and research outcomes and will raise awareness with service providers, policy makers and employers, ultimately influencing the mainstreaming of its EO strategy

Research and evaluative out-comes will be disseminated as evidence of best practice in achieving successful out-comes to inform local, regional, and national policy and practice through:

- Policy reports
- The development of practice protocols with key service providers
- Sectorally based networking opportunities, including the Equal Thematic Networking Group
- Local and sub regional social enterprise strategies
- Formal policy feedback mechanisms with the DTI
- Formal policy feedback mechanisms with other policy agencies

11.2 Potential for mainstreaming equal opportunities

Please describe your DP's potential for mainstreaming equal opportunities outcomes into policy or practice. (300 words)

It will be aimed at:

- Registered Social Landlords and other housing providers
- Regional Action and Involvement South East (RAISE),
- The Local Government Association
- Regional City and County Councils
- Strategic Health Authorities
- The Prison and Probation service
- The South East European Social Policy Reference Group
- Corporate Social Responsibility practitioners

Cultural Shift will significantly improve the employment position of individuals/groups who face discrimination in the labour market. Transferred into mainstream practice, its' EO approach will achieve a vast improvement of the equality of opportunity of people who face discrimination across a wider area.

Through application of its' EO Policy, the DP will guarantee equality of opportunity within its activities for staff and beneficiaries. The methods it uses to identify and combat discrimination internally will also be disseminated and available for mainstreaming.

11.3 Thematic Networking Group methods

Please suggest methods that your DP's Thematic Networking Group could use to mainstream its outcomes. (300 words)

The DP will work with the TNG to develop a strategy for dissemination that links to the activities of other UK theme D DPs and their transnational partners. It is suggested that these methods could include joining up networks of practitioners, advisors and policy makers to add value to individual DPs and taking a strategic approach to the targeting of key interest organisations such as the NHS the Local Government Association etc. The TNG could also bring together a national body of evidence of success through a co-ordination of case study formats to ensure comparable examples are developed. Beneficiary engagement in this process could be undertaken through a theme D wide multimedia project that would look at the different experiences of projects across the UK. This would add gravitas to the recommendations being fed up to policy makers.

The Cultural Shift DP would also recommend a strategic lead approach on key areas that overlap in some DPs in the UK to ensure that duplication is minimised and resources targeted to the most comprehensive effect throughout all the activities taking place. We would recommend a centralised events diary that would again enable collaboration with other DPs, reducing duplication of events, maximising impact and maximising the use of resources. It is also evident that the huge diversity of representation on the national TNG would support a targeted approach to approaching key policy groupings, for example RDAs could lead on influencing and disseminating information to Business Links throughout the UK, academic led DPs could disseminate most effectively to educational institutions etc.

Finally, the wealth of information and resources that will be developed throughout this process should be centrally documented with co-ordination of disseminating new resources through key agencies such as the social enterprise coalition throughout the process of action 2 and beyond.

Section 11: Leading principle - mainstreaming

11.4 Intellectual property rights (IPR)

Please describe how your DP will manage IPR when developing new products and services.

(300 words)

Partners have agreed that any Intellectual Property that arises directly from the work of the partnership will be the joint property of the South East England Development Agency and the author of the product (be that an individual, group or organisation).

All products and methods will be made public through the Cultural Shift website. All public documents and reports will be available for download from this website at no charge.

Partners are aware that copyright is treated differently under different legal systems and mindful of 'moral rights' existing in other countries.

Section 12: Monitoring and evaluation**12.1 Monitoring methods and approaches**

**Please describe how your DP will monitor its activities, processes, outcomes and partnership.
(300 words)**

European Institute of Social Services is responsible for managing all ESF administration, monitoring requirements, and transnational co-ordination on behalf of the Cultural Shift DP.

The DP will use common monitoring tools and systems which will include information that will enable monitoring against equal opportunity targets. Empowerment and equal opportunities will be monitored via staff and beneficiary surveys and, additionally, through evaluation processes. This will link directly to surveys related to targets set in the DP EO Implementation Plan.

Data collated will include:

- § beneficiary engagement
- § beneficiary achievement encompassing EO monitoring
- § beneficiary activity
- § partnership expenditure
- § evaluation reports

A variety of monitoring tools will be used throughout the partnership which will include:

- Beneficiary enrolment form.
- Beneficiary assessment and progress form
- Staff reports on beneficiary progress
- Beneficiaries self-reporting of their progress
- Staff timesheets
- Staff salary details forms
- Summary expenditure spreadsheets
- On-going evaluation

The beneficiary enrolment and progress forms will include information that will enable monitoring against equal opportunity targets.

EISS will train partners in the use of these tools and will collect these tools from

Partners quarterly. EISS will collate this monitoring information and present it to the management board and to SEEDA in order to inform management decisions as the partnership progresses.

These monitoring processes will be supplemented through the DP Equal Opportunity Surveys feed into the independent evaluation process.

Section 12: Monitoring and evaluation**12.2 Monitoring framework**

Please provide a monitoring framework for your DP's Action 2 work plan in as described in Section 6.3.

Objective No	1			
Activities	Qualitative indicators	Quantitative indicators	Timeframe	Source documentation
Activity 1	Incubation baseline methodology designed	Incubation methodology applied to literature review and at semi structured interview process	July 05	Incubation baseline methodology Incubation assessment final report
Activity 2	Design of transnational partnership evaluation process	Process applied to 9 enterprises throughout the UK, Poland and Italy	October 05- ongoing	Quarterly evaluation reports Final case study write ups
Activity 3	Incubation model designed	Incubation model implemented with 3 UK teams	July 05- ongoing	Quarterly updates reports on incubation process
Activity 4	Business Incubation exchange visit outline schedule agreed	5 UK business advisors attend transnational exchange	January 06	Business Incubation exchange schedule Transnational Visit report
Activity 5	Agreement of key incubation themes with transnational partners	Write up of 3 country perspectives on incubation	July 05-May 07	Cross Country guide to incubation processes
Activity 6	Mainstreaming strategy for incubation partners developed	Incubation findings presented to at least 3 policy and practitioner audiences	May 07- Dec 07	Presentation on cross country incubation

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Objective No	2			
Activities	Qualitative indicators	Quantitative indicators	Timeframe	Source documentation
Activity 1	Design of semi structured focus group questions	4 semi structured focus groups undertaken	July 05	Focus group feedback reports
Activity 2	Outline agreement of 4 initial protocol areas	4 protocols developed	Aug 05-june 07	4 protocols developed
Activity 3	Timetable developed for first phase of main research	Interview process and literature review undertaken	July 05-December 05	Research methodology and gant chart
Activity 4	2 nd tranche of protocol guidance areas identified and agreed with steering group	At least 2 additional protocol guides developed in response to ongoing evaluation process	July 06-May 07	2 second phase protocol guides
Activity 5	Feedback report written on protocol user friendliness	Completion of questionnaire by key users of protocols	December 06	User Questionnaire and feedback report

Objective No	3			
Activities	Qualitative indicators	Quantitative indicators	Timeframe	Source documentation
Activity 1	Partnerships developed with at least 3 sector groupings	3 background research documents into key market areas developed	July 05-March 06	3 research documents
Activity 2	Working groups formed to take forward recommendations	Recommendations implemented by working groups	December 05-ongoing	Recommendations report Working group minutes
Activity 3	Inclusive employment practice for social enterprise developed	Practice implemented by 3 enterprise teams	July 05 Ongoing	Inclusive employment practice guidance
Activity 4	Market specific recommendations on incubation and partnership developed	Partner resources diverted to the development of social enterprise	July 06 – end	Partner recommendations
Activity 5	Transnational partner exchange on market specific areas planned	At least 4 sector participants in transnational exchange	March 06	Transnational report

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Objective No	3			
Activities	Qualitative indicators	Quantitative indicators	Timeframe	Source documentation
Activity 6	Partners identified to participate in roll out of start-up and incubation models developed through the programme	At least 4 partners assisted through the process	December 06 onwards	Protocols and incubation guidance Roll out plan

Objective No	4			
Activities	Qualitative indicators	Quantitative indicators	Timeframe	Source documentation
Activity 1	Literature review plan developed	Literature review completed	July – September 05	Literature review plan Literature review
Activity 2	Development of case study proforma in partnership with transnational partners	Case study proforma applied to 9 case studies	July 05 to end of programme	9 case studies Case study proforma
Activity 3	Timetable of policy interviews developed	At least 6 interviews undertaken	July 05 to end of programme	Interview write ups Final report
Activity 4	Monthly report proforma developed	Monthly reports collated from all partners	July 05 to end of programme	Monthly reports
Activity 5	Key thematic areas of final report agreed	Final report developed	July 05 to end of programme	Final report
Activity 6	Dissemination plan for final report developed	Publication of final research in academic journals	July 07- December 07	Final report

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Objective No	5			
Activities	Qualitative indicators	Quantitative indicators	Timeframe	Source documentation
Activity 1	Develop engagement plan for social entrepreneurs in the region	Engage at least 50 social entrepreneurs	July 05 to end of programme	Social Entrepreneurs database Regional social entrepreneurs research documentation
Activity 2	Develop publicity materials to engage private sector organisations in the programme	Engage at least 4 private sector organisations in the process	July 05 to end of programme	Private sector marketing materials
Activity 3	Develop programme of cross sector engagement	8 innovation meetings held	July 05 to end of programme	Innovation meeting reports
Activity 4	As above	As above	As above	As above

Objective No	6			
Activities	Qualitative indicators	Quantitative indicators	Timeframe	Source documentation
Activity 1	Identify regional steering group sub groups for cultural shift	Hold quarterly sub group meetings	July 05 onwards	minutes
Activity 2	Develop marketing plan for all products	Marketing materials produced in house style	July 05 onwards	Marketing materials
Activity 3	Plan 2 regional conferences	Implement 2 regional conferences	One in April 06 and one in April 07	Conference reports
Activity 4	Develop outline plan for website	Implement website	July 05	Website

Objective No	7			
Activities	Qualitative indicators	Quantitative indicators	Timeframe	Source documentation
Activity 1	Develop equal opportunities training schedule	Ensure all enterprise teams have EOP training and are implementing through ongoing assessment	July 05 to end of programme	EOP and enterprise team EOPs.

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Objective No	7			
Activities	Qualitative indicators	Quantitative indicators	Timeframe	Source documentation
Activity 2	Skills assessment process designed	3 enterprise teams put beneficiaries through skills assessment	July 05 to end of programme	Enterprise team skills training plans
Activity 3	Enterprise teams outline plans for training bursaries	Implementation of training plans	July 05 to end of programme	Enterprise team training plans and outcome reports
Activity 4	Governance training developed	3 enterprise teams put through governance training	July 05- Sep 05	Governance training plan
Activity 5	Guidance on developing ethical framework developed	3 ethical frameworks created for enterprise teams	July 05- sep 05	3 ethical frameworks
Activity 6	Baseline of empowerment levels identified within each enterprise team	Baselining of empowerment followed up to end of programme	July 05 – end of programme	Empowerment baseline reports
Activity 7	Empowerment issues for all levels of participation identified	Guide to empowerment from the programme developed	July 05 to end of programme	Guide to empowerment
Activity 8	Transnational visits for beneficiaries planned	10 beneficiaries attend transnational visits	By July 07	Transnational reports

Press *Tab* in the last cell of the table to add a row for an additional activity relating to the same objective and number the additional activities.

Click the **2** button on the toolbar to add an additional table for activities relating to a different objective and number the additional objectives and activities.

Please provide details of how you will monitor the leading principles (excluding equal opportunities, which is already dealt with in section 7.2) and other aspects of your DP in the following table.

Please quote in all correspondence

Leading principles or other aspects of the DP	Qualitative Indicators	Quantitative indicators	Timeframe	Source documentation
Empowerment	Soft indicators of changing attitudes to engagement in enterprise. Personal testimonies relating to confidence building, outcome tracking of individuals during and after the programme. Equal Opportunity connection	Number of partners and beneficiaries participating in the cultural shift programme and supporting social enterprise development activities as a result.	July 05-July 07	Minutes Personal empowerment records Enterprise team monitoring and evaluation
Partnership	Inclusive partnership process developed	Number of partners taking part in all activities. Value of non EQUAL based resources being directed towards social enterprise activities as a result of engagement in cultural shift. Linkig to mainstreaming theme and transnational activities	July 2005-July 2007	Partnership minutes Added value evaluation
Innovation	Qualitative evidence of cultural and attitudinal change within organisations partnering in the process	Quantitative outcome evidence of use of tools and resources from the programme to overcome systemic barriers and enable participatory social enterprise to thrive – Linked to Equal opportunities and mainstreaming	July 2005-July 2007	Final report, ongoing action research updates
Mainstreaming	Policy makers and stakeholders aware of the cultural barriers to social enterprise start up and transfer	Definable policy changes from partner organisations	July 2005-July 2007	Associated partner policies
Transnationality	Exchange and understanding of transnational best practice and contexts	Exchange visits undertaken definable objectives achieved.	July 2005-July 2007	Transnational research reports and exchange reports

Please provide information for the leading principles and other aspects of your DP as appropriate. Press *Tab* in the last cell of the table to add a row for an additional objective, leading principle or other aspect.

Section 12: Monitoring and evaluation**12.3 Soft indicators**

Please describe how your DP will use 'soft indicators' to measure the progress towards 'soft' outcomes. (200 words)

'A DIY Guide to Implementing Outcome Monitoring' (Burns 2000) indicates benefits of using soft outcome indicators for three main groups. Benefits are different for each stakeholder group:

- Clients (e.g. by illustrating to individuals that they have made progress while on the project).
- Project managers and project staff (e.g. by enabling an agency to "stand proud" and state what they have achieved, or allowing them to fine-tune their services).
- Funding bodies (e.g. by providing a clearer idea of what a programme is achieving beyond the more easily demonstrated hard outcomes).

The DP will be informed by this and Measuring Soft Outcomes & Distance Travelled (DWP 2001), developed under the first round of Equal.

Monitoring and evaluation is built into all aspects of DP work.

Cultural Shift partners and the evaluator will measure 'soft indicators' of individual movement, progress, development, of a range of personal and interpersonal skills.

Positive development in these qualities will be of key importance in the overall success of the DP, which will use processes to include:

- measurement of current level of development in individual skills
- self assessment
- inter-active questionnaires
- reporting processes
- contributions to evaluation processes
- assessments and reviews.

Section 12: Monitoring and evaluation**12.4 Evaluation methods and approaches**

Please describe how your DP will evaluate its domestic and transnational activities. (300 words)

Evaluation of Cultural Shift South East will be carried out by an independent, objective evaluator, focussing on the main areas of the EQUAL programme. This will include assessment of:

- Progress towards strategic aims and objectives (and recommendations for issues relating to process, governance etc that could accelerate achievement levels.)
- Innovation and added value, potential for mainstreaming resources and outcomes.
- Level of empowerment of beneficiaries with an assessment of the process changes arising from the programme that may lead to greater empowerment of future beneficiaries participating in a similar process.
- Achievement of equality of opportunity
- Publicity and awareness raising achievements.

The evaluation will look at these thematic areas in a number of contexts relevant to the programme including:

The enterprise team level – will look at the local impact the programme has made in the above areas at the local level of implementation. It will assess the organisational impact made on participating organisations in relation to understanding and culture. The enterprise team level will particularly assess the impact on local beneficiaries.

The policy making level – this will assess the impact of the programme in terms of impacting on the wider policy areas of social enterprise and market stimulation with cross sector partnerships. It will assess the added value of the programme to the wider activities of the regional social enterprise steering group and its associated programmes. This will take place through assessment of the impact of resources developed and networks influenced.

The transnational level will assess the achievement of TCA objectives and the ability of outcomes to be transferred internationally.

The evaluation process will use the following methods

- Analysis of monitoring information
- Review of documents / reports
- Desk research
- Focused interviews
- Beneficiary evaluation
- Cost/benefit analysis
- Surveys of audiences
- Grounded theory methods
- Analysis of Equality impact assessments

12.5 Involving target groups**Please describe how your DP will involve the target groups in the evaluation activities. (200 words)**

Beneficiaries will be involved in internal and transnational evaluation through monitoring and management processes.

The external evaluator will actively involve beneficiaries in the setting of evaluation questions, collecting data, reviewing data analysis and presenting evaluation results.

The external evaluator will lead groups with beneficiaries to identify what questions they would like to see answered, and will then support the beneficiaries (with additional support from partner organisations) to play an active role in the evaluation. This may involve training in evaluation techniques (e.g. questionnaires and interviews, participatory research), and supporting beneficiaries to use these techniques.

We will also involve representatives of organisations who are not within the core partnership to comment on evaluation reports.

Beneficiaries will be included within the transnational activities and their views on their transnational exchanges and experiences will be a focus in feedback processes linked to the evaluator.

Section 13: Expenditure analysis

In Sections 13 to 15, you are required to provide your estimated expenditure and funding sources across all the years your DP will be running during Action 2. It is recommended that you build up your costs in line with the interim claim schedule you intend to put in place during Action 2, recording the total costs for all years in the sections below. Please do not include pence in your costings.

13.1 Show the estimated direct costs for staff

For each item of expenditure, please show:

- the method of calculation;
- main items of expenditure; and
- breakdown of costings (*please refer to DPA guidance*).

Staff salary costs. <i>For each type of staff, please indicate annual salary and percentage of time spent on Action 2 activities, or basis for costing if different from above.</i>	Total cost £ (all years)
Staff salary costs sub-total	
Staff travel and subsistence (GB only)	Total cost £ (all years)
Staff travel and subsistence sub-total	
Staff training	Total cost £ (all years)
Staff training sub-total	
Total direct staff costs Action 2	

Section 13: Expenditure analysis**13.2 Show the estimated direct costs for items related to ESF beneficiaries.**

For each item of expenditure, please show:

- the method of calculation;
- main items of expenditure; and
- breakdown of costings (*please refer to DPA guidance*).

Beneficiary allowances	Total cost £ (all years)
Beneficiary allowances sub-total	
Beneficiary travel (GB only)	Total cost £ (all years)
Beneficiary travel (GB only) sub-total	
Childcare and other dependent care costs	Total cost £ (all years)
Childcare and other dependent care costs sub-total	
Staff and beneficiary replacement costs	Total cost £ (all years)
Staff and beneficiary replacement costs sub-total	
Other beneficiary costs	Total cost £ (all years)
Other beneficiary costs sub-total	
Total direct beneficiary costs Action 2	

Section 13: Expenditure analysis**13.3 Show the estimated direct costs for other items of expenditure (domestic UK only)**

For each item of expenditure, please show:

- the method of calculation;
- main items of expenditure; and
- breakdown of costings (*please refer to DPA guidance*).

Premises and overheads	Total cost £ (all years)

Premises and overheads sub-total	

Depreciation of buildings	Total cost £ (all years)

Depreciation of buildings sub-total	

Administrative costs (for example postage, stationery, advertising)	Total cost £ (all years)

Administrative costs (for example postage, stationery, advertising) sub-total	

Consumables	Total cost £ (all years)

Consumables sub-total	

Depreciation of capital items >£1,000. <i>You should show item, cost and calculations.</i>	Total cost £ (all years)

Depreciation of capital items >£1000 sub-total	

Hire and lease of equipment	Total cost £ (all years)

Hire and lease of equipment sub-total	

Small items of equipment (up to £1,000)	Total cost £ (all years)

Small items of equipment (up to £1,000) sub-total	

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Please quote in all correspondence

Section 13: Expenditure analysis

Legal and professional fees <i>(please provide description)</i>	Total cost £ (all years)
Legal and professional fees sub-total	
Bank charges <i>(please provide description)</i>	Total cost £ (all years)
Bank charges sub-total	
Evaluation	Total cost £ (all years)
Evaluation sub-total	
Dissemination and mainstreaming	Total cost £ (all years)
Dissemination and mainstreaming sub-total	
Other <i>(please provide description)</i>	Total cost £ (all years)
Other sub-total	
Total direct other costs Action 2 (domestic costs)	

Please confirm that any capital item costing over £1,000 has been depreciated by typing an 'x' in this box.

--

Section 13: Expenditure analysis**13.4 Show the estimated transnational costs for Action 2.**

For each item of expenditure, please show:

- the method of calculation;
- main items of expenditure; and
- breakdown of costings (*please refer to DPA guidance for information on eligible costs*).

Transnational travel	Total cost £ (all years)
Transnational travel sub-total	
Transnational subsistence	Total cost £ (all years)
Transnational subsistence sub-total	
Other transnational costs	Total cost £ (all years)
Other transnational costs sub-total	
Total transnational costs Action 2	

Section 14: Income analysis**14.1 Public match funding**

Show the sources of public match funding, showing the actual amount and the amount given in-kind (not actual cash).

Name and address of public match funder	Actual amount (cash only)	Description of in-kind support	In-kind amount (non-cash)	Total (actual and in-kind)
a Actual total		b Total in-kind		

14.2 Private match funding

Show the sources of private match funding, showing the actual amount and the amount given in-kind (not actual cash).

Name and address of private match funder	Actual amount (cash only)	Description of in-kind support	In-kind amount (non-cash)	Total (actual and in-kind)
a Actual total		b Total in-kind		

14.3 Revenue

Please give details of the revenue generated by your DP and the amount.

Details of revenue	Amount
Total revenue	

14.4a Will your DP be using New Deal as match funding? (Please type an 'x' in the appropriate box.)

Yes

No

14.4b If 'Yes', the Jobcentre Plus must approve the Equal DPA before it can receive formal Action 2 approval. Click the **D** button on the toolbar to generate the 'ESF Application Match Funded With New Deal' declaration form. Please confirm that you have included the completed and signed 'ESF Application Match Funded With New Deal' declaration with the DPA (please type an 'x' in the box).

Section 15: Summary of expenditure and income

A	Staff costs		Must agree with 13.1
B	Beneficiary costs		Must agree with 13.2
C	Other costs		Must agree with 13.3
D	Transnational costs		Must agree with 13.4
E Total ESF eligible cost Action 2			A + B + C +D
F	Public match funding (actual)		Must agree with 14.1a
G	Public match funding (in-kind)		Must agree with 14.1b
H	Total public match funding		F + G
I	Private match funding (actual)		Must agree with 14.2a
J	Private match funding (in-kind)		Must agree with 14.2b
K	Total private match funding		I + J
L	Total match funding		H + K
M	Revenue		Must agree with 14.3
N	Total match funding and revenue		L + M
O	ESF funding you want (see below)		E – N
P	Intervention rate Must not exceed 50% overall		(O / E) x 100

The ESF amount to be paid to the organisation applying must be:

- between 25% and 50% of the total ESF eligible cost (E); and
- either equal to or more than 25% of the total public expenditure (which is the ESF funding sought (O) plus the public match funding (H)); and
- not more than the total ESF eligible cost (E) less the match funding and revenue supplied (N); and
- not more than the maximum indicative ESF funding for Action 2 detailed in your DP's Agreement.

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Please quote in all correspondence

Section 16: Financial and audit procedures

16.1 Give the type and frequency of internal and external audit procedures and controls for the lead partner or DP Ltd, including the name and address of the auditors

a Internal audit

Internal financial management and control systems

SEEDA has robust and transparent financial management systems which are reviewed and audited internally on a regular basis in accordance with Government regulations. This project will have a separate bank account but will follow the financial systems of SEEDA and based on the good practice guidelines produced by Ecotec, and subject to quarterly internal audit

b External audit, including providing an annual audit certificate

Name and address of auditor

SEEDA is externally audited on an annual basis by auditors appointed by the National Audit Commission. SEEDA will provide an annual Audit Commission Certificate.

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Please quote in all correspondence

Section 17: Certification for lead partner or DP Ltd

- I certify that the information contained in this Development Partnership Agreement is correct and confirm that the work programme will be carried out as described in this application.
- I acknowledge that this work programme will be subject to regular monitoring and agree to keep suitable records for this purpose. I also acknowledge that the European Commission, the European Court of Auditors and the Department for Work and Pensions (DWP) may carry out on-the-spot checks.
- I will inform the DWP through the appointed Support Unit of any significant changes.
- I agree to repay to the DWP on demand, any ESF money which has been paid, if the European Commission, the European Court of Auditors or the DWP decide, after investigation, that the scheme has not been carried out in accordance with this application and ESF regulations.
- I certify that the proposal contained in this application satisfies the objectives and priorities of the theme of the programme it forms a part of as described in the DWP guidance.
- I confirm that the match funding does not contain any funds which include or have already been used to attract ESF or other EU funding.
- I will inform the DWP immediately of any changes to the funding provisions, through the appointed Support Unit.

Signed

Date

Name
(in CAPITALS)

PAUL LOVEJOY

Position in lead
partner or DP
Ltd

Director of Strategy and Sustainability
SEEDA

Official stamp of lead partner or DP Ltd

Dossier Number 04E162ESO

Please quote in all correspondence

Annex 1: Your Development Partnership (including partner certification)

1.1 Please provide details of your confirmed domestic partner organisations for Action 2.

For information about completing each of the fields, please refer to the DPA Guidance.

Partner number	1	Details	
Organisation name	South East England Development Agency		
Phone	01483 500 797		
Fax	01483 484 247		
E-mail	kateannison@seeda.co.uk		
Address: line 1	Cross Lanes		
Address: line 2			
Town or city	Guildford		
Postcode	Gu1 1YA		
Website	www.seeda.co.uk		
Legal status	Government Agency		
Organisation type	Regional Development Agency		
Please specify if 'Other'			
Size of organisation - please tick			
	Staff: up to 10	<input type="checkbox"/>	Staff: between 51 and 250
	Staff: between 11 and 50	<input type="checkbox"/>	Staff: more than 250
Date of joining	1/09/04		
Date of leaving	31/12/07		
Main responsibility – please tick all that apply			
Management, administrative, finance and so on	<input checked="" type="checkbox"/>	Monitoring and data collection	<input checked="" type="checkbox"/>
Designing activities	<input checked="" type="checkbox"/>	Evaluation - internal	<input checked="" type="checkbox"/>
Delivery and implementation	<input checked="" type="checkbox"/>	Co-ordinating transnational activities	<input checked="" type="checkbox"/>
Contact name 1:	Kate Annison		
E-mail	kateannison@seeda.co.uk		
Phone number	01483 500 797		
To be contacted for: (brief description)	All issues related to the programme		
Contact name 2:	Pam Mchale		
E-mail	pammchale@seeda.co.uk		
Phone number	01634 899 904		
To be contacted for: (brief description)	general issues, not including finance and monitoring queries		

Dossier Number
Please quote in all correspondence

Annex 1: Your Development Partnership (including partner certification)

1.2 Please provide certification for each partner organisation listed in Annex 1.1.

Name of partner organisation	South East England Development Agency
Name of DP	Cultural Shift South East
DP's Action 1 Dossier number	04E162ESO

- I certify that the information contained in this Development Partnership Agreement is correct and confirm that the work programme will be carried out as described in this application.
- I acknowledge that this work programme will be subject to regular monitoring and agree to keep suitable records for this purpose. I also acknowledge that the European Commission, the European Court of Auditors and the Department for Work and Pensions (DWP) may carry out on-the-spot checks.
- I certify that the proposal contained in this application satisfies the objectives and priorities of the theme of the programme it forms a part of as described in the DWP guidance.

Signed	<input type="text"/>	Official stamp of partner organisation
Date	<input type="text"/>	
Name (in CAPITALS)	PAUL LOVEJOY	
Position in partner organisation	Director of Strategy and Sustainability	

Dossier Number 04E162ESO

Please quote in all correspondence

1.1 Please provide details of your confirmed domestic partner organisations for Action 2.

For information about completing each of the fields, please refer to the DPA Guidance.

Partner number	Details		
Organisation name			
Phone			
Fax			
E-mail			
Address: line 1			
Address: line 2			
Town or city			
Postcode			
Website			
Legal status	CLICK HERE		
Organisation type	CLICK HERE		
Please specify if 'Other'			
Size of organisation - please tick			
Staff: up to 10	<input type="checkbox"/>	Staff: between 51 and 250	<input type="checkbox"/>
Staff: between 11 and 50	<input type="checkbox"/>	Staff: more than 250	<input type="checkbox"/>
Date of joining			
Date of leaving			
Main responsibility – please tick all that apply			
Management, administrative, finance and so on	<input type="checkbox"/>	Monitoring and data collection	<input type="checkbox"/>
Designing activities	<input type="checkbox"/>	Evaluation - internal	<input type="checkbox"/>
Delivery and implementation	<input type="checkbox"/>	Co-ordinating transnational activities	<input type="checkbox"/>
Contact name 1:			
E-mail			
Phone number			
To be contacted for: (brief description)			
Contact name 2:			
E-mail			
Phone number			
To be contacted for: (brief description)			

Dossier Number

04E162ESO

Please quote in all correspondence

Annex 1: Your Development Partnership (including partner certification)

1.2 Please provide certification for each partner organisation listed in Annex 1.1.

Name of partner organisation	
Name of DP	
DP's Action 1 Dossier number	

- I certify that the information contained in this Development Partnership Agreement is correct and confirm that the work programme will be carried out as described in this application.
- I acknowledge that this work programme will be subject to regular monitoring and agree to keep suitable records for this purpose. I also acknowledge that the European Commission, the European Court of Auditors and the Department for Work and Pensions (DWP) may carry out on-the-spot checks.
- I certify that the proposal contained in this application satisfies the objectives and priorities of the theme of the programme it forms a part of as described in the DWP guidance.

Signed		Official stamp of partner organisation
Date		
Name (in CAPITALS)		
Position in partner organisation		

Please repeat information for each partner, numbering partners as appropriate. Click the + button on the toolbar to add an additional sheet and certification page for each partner.

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Annex 2: DP diagram or chart

Annex 3: Your Transnational Partnership

Please give brief details of the transnational partners that will join your Transnational Partnership during Action 2.

Number	Name and address of DP or Associated Partner	Funding programme (for example Equal, PHARE, TACIS, MEDA)	If Equal, state theme
1	INC.I.SO (CONFCOOPERATIVE TOSCANA) VIA SAN DONATO, 38 50127 FIRENZE ITALY www.confcooperative.it Tel:055 / 3215366 Fax:055 / 3215369 Email: info@confcooperative-toscana.coop	EQUAL	Theme D
2	Searching for a Polish model of social economy. (UNDP) Aleja Niepodległości 186 00-608 Warszawa POLAND www.undp.org.pl Tel:+48 22 825 92 45 Fax:+48 22 825 49 58 Email: registry.pl@undp.org	EQUAL	Theme D

Annex 4: Equal opportunities policy

Please insert here.

**The CULTURAL SHIFT
EQUAL OPPORTUNITIES POLICY**

Cultural Shift is committed to equality of opportunity within all the activities carried out through this Development Partnership.

This Equal Opportunities Policy is the core document of the Cultural Shift Partnership and includes measures to tackle discrimination on grounds of gender, race, colour, ethnic or national origin, disability, religious or similar belief, sexual orientation, and age.

Each Partner Organisation will comply with the Equal Opportunities Policy for all activities carried out under the work programme of the Partnership and will actively participate in its implementation

This Policy will apply to ALL Cultural Shift Staff, Beneficiaries, and volunteers and will be in place until the end of the Project. Together with Cultural Shifts Equal Opportunities Implementation Plan, it will be monitored throughout this period by the Cultural Shift Management Board, the Equal Opportunities Working Group, the Evaluators and Equal Opportunities training, with specific involvement and feedback from the Beneficiaries and Staff of the Cultural Shift Partnership

1. OVERALL AIM OF THE CULTURAL SHIFT PARTNERSH

1.1 Working through a transnational, multi-partner based action research process of participative design and development, The Cultural Shift partnership has two strategic aims:

- To model inclusive employment models delivered through independent social enterprises.
- To create new protocols for entrepreneurial partnerships between mainstream public sector providers and social enterprises in the South East.

These objectives will be achieved by working through a transnational, multi-partner based action research process of participative design and development to create 4 enterprises working effectively with mainstream agencies. This process will create policy tools and models that will be mainstreamed into regional policy.

1.2 Cultural Shift is committed to equality of opportunity for all regardless of race, nationality, ethnic origin, sexual orientation, gender, marital status, family commitments, age, religious or

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similar belief, age or disability.

- 1.3 The Cultural Shift Development Partnership is committed to ensuring that the core values outlined in this Policy are actively encouraged and achieved.

2. THE DESIGN OF THE CULTURAL SHIFT EQUAL OPPORTUNITIES POLICY

- 2.1 All Partners' Organisations will have equal opportunities policies in place that include measures to tackle discrimination on grounds of gender, race, colour, ethnic or national origin, disability, marital status, family commitments, caring commitments, hours worked, sexuality, age, religion (or similar belief), social class or trade union membership.
- 2.2 Partners' individual Equal Opportunities Policies will form a basis for the Partnership's Equal Opportunities Policy.
- 2.3 Cultural Shift's Equal Opportunities Policy is in compliance with the following key legislation: *Equal pay Act 1970; Rehabilitation of Offenders Act 1974; Sex Discrimination Act 1975 and 1986; Race relations Act 1976; Disability Discrimination Act 1985; The Protection from Harassment Act 1997 and other relevant equality legislation and regulations.*
- 2.4 All Partners will follow the Codes of Practice published by the *Disability Rights Commission, the Commission for Racial Equality and the Equal Opportunities Commission for Employers and Service Providers* where applicable.
- 2.5 All Partners will comply with the *Equality Standard for Local Government* as adapted for EQUAL Projects minimum Level 2 and all Partners are required to commit to the Partnership's aim to progress to Level 5 of the Standard by the end of Action 2.
- 2.6 Each independent Social Enterprise created within Cultural Shift will be required to commit to the Partnership's Equal Opportunities Policy; Implementation Plan; all relevant equality legislation as outlined in 2.3 above; all relevant Codes of Practice and Standards as listed in 2.4 and 2.5 above.

3. THE PROMOTION OF THE CULTURAL SHIFT POLICY

- 3.1 CULTURAL SHIFT will take positive steps in its' selection of Pilot Sites to ensure, where possible, that the diversity of its target groups is represented.

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- 3.2 Partners will actively seek to promote and disseminate information regarding CULTURAL SHIFT in ethnic communities .
- 3.3 CULTURAL SHIFT will provide positive images of its' target groups and Ethnic Communities in all publicity and promotional materials.
- 3.4 Partnership activities will be equally open to men and women and provide additional support (e.g. child and dependent care) to those who need it.
- 3.5 Partners will challenge discriminatory assumptions about supposedly male and female occupations by ensuring open access to both men and women
- 3.6 CULTURAL SHIFT will ensure that promotional and other documents will be made available in alternative formats and where appropriate, commonly used minority languages.
- 3.7 The Partnership will use the experience of Partner Agencies to meet the needs of beneficiaries experiencing a combination of disadvantages
- 3.8 CULTURAL SHIFT will encourage and set targets for the participation of representatives of disadvantaged groups in the management and evaluation activities of the project.
- 3.9 CULTURAL SHIFT will strive to create where possible, an over representation of women, people with disabilities, members of ethnic minorities and other disadvantaged groups within the Beneficiary, Staff and Management base of the Partnership, relative to their numbers in the pilot areas.

4. IMPLEMENTATION OF CULTURAL SHIFT'S EQUAL OPPORTUNITIES POLICY

- 4.1 The Partnership will develop an Equal Opportunities Implementation Plan which will be reviewed regularly by an Equal Opportunities Working Group comprised of Partner and Beneficiary Representatives.
- 4.2 It will be the responsibility of all Partners to ensure that CULTURAL SHIFT's Equal Opportunities Policy and Implementation Plan is communicated to all Project Staff and Beneficiaries through job descriptions, induction processes, training, workshops and other Partnership activities.
- 4.3 CULTURAL SHIFT will ensure that training on the Project's Equal Opportunities Policy and Implementation Plan will be incorporated into all Development Partnership events.

Please quote in all correspondence

In addition, individual Partner Organisations will take responsibility to ensure that all Managers, Staff, and Volunteers receive the necessary training and induction in how to uphold the Equal Opportunities Policy and Implementation Plan.

- 4.4 Partners will ensure they provide additional support to disadvantaged Beneficiaries as required so that they can understand the Equal Opportunity Policy and contribute to its monitoring.
- 4.5 Partners will support Beneficiaries to participate in CULTURAL SHIFT, by working to boost their self-confidence and motivation, and by helping Employers to understand the case for equality of opportunity and to adapt their recruitment and staff development practices accordingly.
- 4.6 Partners will ensure that service users are consulted about whether they would like services delivered to a single gender group.
- 4.7 The Partnership will employ monitoring systems which will embrace a variety of formats including:-
 - audio tape
 - computer disk
 - commonly used ethnic minority languages
 - large print
 - verbally imparted informationand other formats, where identified by the Management Board and EO Group as required.
- 4.8 Partners will ensure that services are provided in such a way as to empower people with disabilities to fully participate in the work and benefits of the partnership.

5. MONITORING/TARGETS

- 5.1 The Partnership will set targets for the level of involvement of members of disadvantaged groups in the Management, Staffing and Client group of the Partnership's activities.
- 5.2 Information on the gender, age, ethnic origin and disability breakdown of the Staff, Beneficiaries and Management of Partner Organisations will be provided by all Partners to the DP Management Board on a regular basis.
- 5.3 Partners will use common monitoring tools to measure the project achievement in involving members of disadvantaged groups, and the relative success of each group within the project.
- 5.4 An Equal Opportunities Working Group will be established and maintained by the Partnership and in conjunction with the Advisory

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Group and will have responsibility for reviewing monitoring reports and recommending any necessary action to the CULTURAL SHIFT Management Board.

- 5.5 The Partnership will ensure Beneficiaries are involved in the review of the Project's equal opportunities aims and procedures.
- 5.6 The Partnership and individual Partners will ensure the measurement of the relative achievements of people within different disadvantaged groups through the partnerships activities, in order to identify and resolve any barriers that prevent specific groups from succeeding.

6. RECRUITMENT

- 6.1 All CULTURAL SHIFT Partners will actively ensure that all recruitment and selection procedures comply with legislation and current best practice and that under represented groups are targeted.
- 6.2 All CULTURAL SHIFT Partners will undertake to actively encourage members of disadvantaged groups to apply to deliver the Partnership's activities.

7. COMPLAINTS

- 7.1 Instances of discrimination, on grounds of gender, race, disability, sexuality, religious/similar belief or age will not be tolerated from Staff, Volunteers or Beneficiaries and will be dealt through the Partnership's formal complaint or grievance procedure.
- 7.2 These procedures will specifically address instances of bullying and harassment
- 7.3 The Partnership will design an accessible and fair Complaints and Grievance procedure for Beneficiaries, Staff, and Volunteers which will involve an independent mediator to settle any disputed complaints.
- 7.4 CULTURAL SHIFT's Complaints & Grievance procedures will be publicised by Partners through job descriptions, referral and application forms, staff notices and training courses and will also be available on the Partnership's website.
- 7.5 Social Enterprises created within the CULTURAL SHIFT project will be required to ensure they comply with 7.1 to 7.4 above and where appropriate, develop their own Complaints and Grievance Procedures.

Annex 5: Beneficiaries, support measures, activities and outcomes

Part 1: Beneficiaries

Please make sure that your estimates are as accurate as possible. The groups identified here must be consistent with the information you provided at Section 4.2.

5.1 Which of the following statements best describes your DP (please tick one box only)?

- The DP will support individuals (including self-employed and sole traders)
- The DP will support companies and their employees (including *social firms*)
- The DP will support companies and their employees, and individuals not employed by the companies
- The DP will only support companies (complete Annex 5.9 and 5.11b(1) only)
- The DP will not directly benefit individuals or companies (for example it may be a research project) (complete Annex 5.11b(1) only)

5.2 Please indicate the total number of ESF beneficiaries you expect over the lifetime of your DP.

	Male	Female	Total
Unemployed or not active in the labour market	10	10	20
Employed	100	100	200
Other (include those not in the labour market)	10		10
Total	120	110	230

If 'Other', please explain	Offenders on pre-release training
----------------------------	-----------------------------------

a Unemployed beneficiaries

Please estimate how long the beneficiaries are likely to have been out of work before becoming involved with your DP.

	Length of unemployment										Total	
	Less than six months		Six to 11 months		12 to 23 months		24 to 35 months		36 months and over			
Age	M	F	M	F	M	F	M	F	M	F	M	F
16 to 24											0	0
25 to 49					10	10					10	10
50+											0	0
Total	0	0	0	0	10	10	0	0	0	0	10	10

The numbers in this table must match exactly with the number and breakdown of unemployed beneficiaries in 5.2 above.

Annex 5: Beneficiaries, support measures, activities and outcomes

b Employed beneficiaries

Please estimate the status of beneficiaries before becoming involved with your DP.

Age	In SMEs (1 to 249 employees) or self-employed		In large firms (250 employees or more)		Total	
	Male	Female	Male	Female	Male	Female
16 to 24	10	10			10	10
25 to 49	60	60			60	60
50+	30	30			30	30
Total	100	100	0	0	100	100

The numbers in this table must match exactly with the number and breakdown of employed beneficiaries in 5.2 above.

5.3 Please estimate the total number of beneficiaries from the following ethnic groups.

Ethnic group	Male	Female	Total
White – British	40	40	80
White – Irish	10	10	20
White – other	10	10	20
Mixed – white and black Caribbean			0
Mixed – white and black African			0
Mixed – white and Asian			0
Mixed – other			0
Asian or Asian British – Indian	10	10	20
Asian or Asian British – Pakistani	10	10	20
Asian or Asian British – Bangladeshi			0
Asian or Asian British – other			0
Black or black British – Caribbean	10	10	20
Black or black British – African	10	10	20
Black or black British – other			0
Chinese			0
Other (please state below)			0
Not known			0
Totals	100	100	200

'Other' please state	
----------------------	--

The numbers in this table must match exactly with the total number of beneficiaries in 5.2 above.

Annex 5: Beneficiaries, support measures, activities and outcomes**5.4 Please estimate the number of disabled beneficiaries**

	Male	Female	Total
Physical disability	5	5	10
Mental disability	0	0	0
Learning disability	5	5	10
No disability	90	90	180
Total	100	100	200

The numbers in this table must match exactly with the total number of beneficiaries in 5.2 above.

5.5 Please estimate how many beneficiaries your DP will work with from the following backgrounds.

You may make more than one entry for people falling into a number of categories.

Background	Male	Female	Total
Ex-offenders, prison leavers and those under statutory supervision	10	0	10
Homeless people	0	0	0
Refugees	0	0	0
Asylum seekers	0	0	0
Drug and alcohol misusers	5	5	10
16- to 17-year-olds in danger of being excluded from school	0	0	0
Roma people and travellers	0	0	0
People over 50	15	15	30
Labour market returners	20	20	40
Those from disadvantaged areas (that is the 10% most deprived wards)	40	40	80
Jobseekers with low basic skills	0	0	0
Lone parents and people with care responsibilities	10	20	30
Others (please state below)	0	0	0
Total	100	100	200

'Others' please state	
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Annex 5: Beneficiaries, support measures, activities and outcomes**5.6 Please estimate how many beneficiaries will have the following qualifications before becoming involved with your DP.**

Qualification level	Male	Female
No qualifications	50	50
Qualifications below NVQ 1 (or equivalent)	10	10
NVQ 1 or equivalent	30	30
NVQ 2 or equivalent	10	10
NVQ 3 or equivalent		
NVQ 4 or equivalent		
NVQ 5 or equivalent		
Other (please state below)		
Total	100	100

'Other' please state	
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The numbers in this table must match exactly with the total number of beneficiaries in 5.2 above. Where more than one qualification may be held, only count the highest, to avoid double counting.

5.7 Please estimate the number of beneficiaries who will benefit from the following.

Equal opportunities activities	Male	Female
Training in non-traditional areas for their sex		
Work experience in non-traditional areas for their sex		
Qualifications in non-traditional areas for their sex		
Employment in non-traditional occupations for their sex		
Improved awareness of opportunities in occupations dominated by men or women	10	10

5.8 In relation to the beneficiaries described in Annex 5.2 to 5.7, please indicate the degree of priority your DP will grant to the following issues (0 = no priority, 4 = high priority).

Issues relating to beneficiaries	Degree of importance (0 to 4)
Unemployment	4
Discrimination and inequality in employment	4
Racial discrimination	4
Asylum	3
Disabilities	4
Low qualification	3
Gender discrimination	3
Age	3
Sexual orientation	2
Religion	2
Support to entrepreneurship	4
Other discrimination	2

Annex 5: Beneficiaries, support measures, activities and outcomes**5.9 Support to companies**

Please only complete this section if you have selected 'The DP will only support companies' in Section 5.1.

a Please estimate the number of companies in the following categories that will receive support

Company size	Less than 250 employees	250 or more employees	Total
Number of companies (excluding firms in the social economy)			0
Number of firms in the social economy			0
Total	0	0	0

The figures in the Total column must match exactly with the totals in Section 5.9a.

b In how many of the companies will you promote flexible working arrangements?

Company size	Less than 250 employees	250 or more employees	Total
Number of companies (excluding firms in the social economy)			0
Number of firms in the <i>social economy</i>			0
None			0
Total	0	0	0

The figures in the Total column must match exactly with the totals in Section 5.9a.

Annex 5: Beneficiaries, support measures, activities and outcomes**Part 2: Support measures****5.10 Please give details of the support measures you will provide and estimate the percentage of beneficiaries who will benefit.****a Support measures**

Support measure	Provided		% of beneficiaries who will benefit
	Yes	No	
Childcare	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10.00
Care for dependants	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10.00
Training allowance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	20.00
Travel support or provision	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100.00
Subsistence	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100.00
Wage subsidies	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10.00
Translation (into ethnic minority languages)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5.00
Counselling, guidance and advice	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Literacy and numeracy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10.00
English as a second or other language (ESOL)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Other (please state below)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

'Other' please state	
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b Support measures for people with disabilities

Support measure	Provided		% of disabled beneficiaries who will benefit
	Yes	No	
Access to premises	<input checked="" type="checkbox"/>	<input type="checkbox"/>	20.00
Transport to training sites	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10.00
Specialist provision (staffing and facilities)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	20.00
Accessible training materials (Braille, tapes and so on)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5.00
Signers and interpreters	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5.00
Other (please state below)	<input type="checkbox"/>	<input type="checkbox"/>	

'Other' please state	
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Annex 5: Beneficiaries, support measures, activities and outcomes

Part 3: Development Partnership activities

For each activity, you should indicate whether your DP will provide it. If your answer is 'Yes', please indicate the importance of the activity within your DP using a score of 0 (no activity) to 4 (significant or main activity). In 5.11a you should also indicate the estimated percentage of beneficiaries who will benefit from each activity. Please make sure that the summary information you provide below is consistent with the information you have provided at Sections 3, 4 and 6.

5.11 Nature and focus of activities to be carried out.

a Please indicate the activities that your DP will carry out to help individuals.

Actions for individuals	Provided		Degree of importance (0 to 4)	Estimated % of people who will benefit
	Yes	No		
Work advice, guidance and counselling	<input type="checkbox"/>	<input type="checkbox"/>		
Training	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	10.00
Training in the workplace	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	10.00
Key and basic skills support	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	10.00
Work placements	<input type="checkbox"/>	<input type="checkbox"/>		
Job rotation or job sharing	<input type="checkbox"/>	<input type="checkbox"/>		
Employment aids and job-search help (including self employment)	<input type="checkbox"/>	<input type="checkbox"/>		
Helping people to join in, assessing the needs of individuals and individual action planning	<input checked="" type="checkbox"/>	<input type="checkbox"/>		10.00
Motivation and orientation	<input type="checkbox"/>	<input type="checkbox"/>		
Help into self-employment	<input type="checkbox"/>	<input type="checkbox"/>		
Help into lifelong learning	<input type="checkbox"/>	<input type="checkbox"/>		
IT and ICT training and support	<input type="checkbox"/>	<input type="checkbox"/>		
Other (please state below)	<input type="checkbox"/>	<input type="checkbox"/>		

'Other' please state	
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Please quote in all correspondence

Annex 5: Beneficiaries, support measures, activities and outcomes

b (1) Please indicate any activities that your DP will carry out to improve systems or structures in the following areas.

	Provided		Degree of importance (0 to 4)
	Yes	No	
Job creation and support	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3
Training of trainers and agents of change (if 'Yes', please complete 5.11b(2))	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4
Improving employment services and recruitment structures	<input type="checkbox"/>	<input type="checkbox"/>	
Designing and developing training programmes and arranging certification	<input type="checkbox"/>	<input type="checkbox"/>	
Anticipating technical changes	<input type="checkbox"/>	<input type="checkbox"/>	
Organising work and improving access to work places	<input type="checkbox"/>	<input type="checkbox"/>	
Guidance and social services	<input type="checkbox"/>	<input type="checkbox"/>	
Awareness raising, information, publicity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3
Studying and analysing discrimination	<input type="checkbox"/>	<input type="checkbox"/>	
Other (please state below)	<input type="checkbox"/>	<input type="checkbox"/>	

'Other' please state

b (2) Please estimate how many trainers or agents of change you will train through your DP.

	Male	Female	Total
Number of trainers or agents of change	10	10	20

Annex 5: Beneficiaries, support measures, activities and outcomes**Part 4: Beneficiary outcomes****5.12 Please estimate what will happen to beneficiaries following their involvement in DP activities.**

Outcome	Not employed on the day before starting with DP		Employed on the day before starting with DP		Other		Total	
	Male	Female	Male	Female	Male	Female	Male	Female
Full-time employment		5	3	3			3	8
Part-time employment							0	0
Self-employment	5						5	0
Voluntary work							0	0
Further education, training, other government programmes	5						5	0
Unemployment							0	0
Other (please state below)							0	0
Not known							0	0
Total	5	5	3	3	0	0	13	8

'Other' please state	
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The numbers in this table must match exactly with the total number of beneficiaries, including 'other', in 5.2.

5.13 Please estimate how many beneficiaries will have achieved the following qualifications as a result of taking part in the activities of your DP.

Qualification level	Total	
	Male	Female
Qualifications below NVQ 1 (or equivalent)		
NVQ 1 or equivalent		
NVQ 2 or equivalent		
NVQ 3 or equivalent		
NVQ 4 or equivalent		
NVQ 5 or equivalent		
Other (please state below)		
None	230	230
Total	230	230

'Other' please state	
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The numbers in this table must match exactly with the total number of beneficiaries in 5.2 above. You should count each beneficiary only once, using the highest qualification expected.