



*Doing Good, Doing Well*

# **Lattice Works Social Enterprise Development Programme**

**September 2011 - March 2014**

**Final report**

**May 2014**

***A web of support that  
grew social enterprise activity  
in Lancaster District***



## ***Acknowledgments***

We would like to thank the organisations and individuals who gave up their time to be part of the evaluation, and especially:

James Sommerville , previously of Lancaster City Council,  
Professor Chris May of Lancaster University and chair of the Lattice Works  
Reference Group, and other members of the reference group

Report finalised May 2014 by Jez Hall of Shared Future CIC, and Mandy Naylor of Latent Promise.

© Reserved to Shared Future CIC.

Co Number: 06919338

Although high standards have been used in the preparation of the information, analysis, views and projections presented in this report, no legal responsibility can be accepted by Shared Future CIC or Latent Promise, for any loss or damage resultant from the contents of this document.

Reproduction for non-commercial reasons in whole or in part is allowed where there is proper reference and weblink given to Shared Future CIC.

## Contents

<b>Overview .....</b>	<b>4</b>
<b>The Lattice Works Programme .....</b>	<b>4</b>
Social Enterprise in Lancaster District.....	5
The people behind Lattice Works .....	6
Value Added as of May 2014 .....	8
<b>The Lattice Works Process.....</b>	<b>10</b>
Setting the Scene .....	10
Lattice Works consisted of 6 initiatives .....	11
Timeline and key milestones .....	12
<b>Training and Development .....</b>	<b>13</b>
SEED Organisational Development Programme.....	13
Seedlings: Start up advice and signposting .....	14
Thrive! Social Enterprise training programme.....	15
Action Learning .....	16
Network Development.....	16
<b>Investing in Social Enterprise.....</b>	<b>17</b>
PIP: Participatory Investment Programme .....	17
Direct Investment.....	18
<b>Governance .....</b>	<b>19</b>
Shared Future CIC .....	19
Help Direct .....	19
Stakeholder relationships.....	20
The Reference Group .....	21
Reporting .....	21
<b>Case Studies .....</b>	<b>22</b>
Case Study 1: ACCESS Counselling .....	22
Case Study 2: Get It Loud In Libraries.....	23
Case Study 3: Strawberry Fields.....	24
Case Study 4: LESS UK Ltd.....	25
Case Study 5: The Well .....	27
<b>Legacy.....</b>	<b>28</b>
<b>Appendix 1: Evaluation and feedback.....</b>	<b>30</b>
<b>Appendix 2: Organisations Supported .....</b>	<b>34</b>
<b>Appendix 3: Financial report.....</b>	<b>35</b>

## Overview

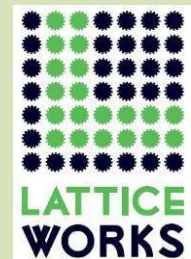
Using £120,000 from Lancashire County Council's performance reward grant, in 2011 the Lancaster City Council-led Lancaster District Local Strategic Partnership (LDLSP) decided to commission a one off 'Social Enterprise Initiative'. Planned to end by March 2013, it was seeking to grow social enterprise (SE) activity in the district. Following competitive tendering the locally-based social enterprise Shared Future CIC won the contract to deliver the initiative, and called it Lattice Works. The contract was delivered in partnership with Help Direct (Age UK Lancashire).

Lattice Works started in September 2011. With careful management of resources, and through partnering with other bodies - such as Lancaster District CVS (LDCVS) and Social Enterprise Lancashire (SELNET) - it is still running in a limited format at the time of producing this report (May 2014). It is due to be fully completed by March 2015.

## The Lattice Works Programme

The desired outcomes of the LDLSP's Social Enterprise Initiative were:

- a) Organisations in Lancaster District that deliver social and environmental benefits, but are not financially sustainable, are supported in investigating the potential for them to move to a social enterprise model, and making the transition to this new business model;
- b) Existing social enterprise organisations in Lancaster District that find themselves in financial difficulty are supported in investigating the potential for them to diversify their income streams, and supported in making the transition to these new income streams;
- c) The social enterprise 'sector' as a whole across Lancaster District becomes more coordinated, effective and sustainable, and overall support capacity for the sector is increased;
- d) There is increased public and partner awareness of the social enterprise 'sector', its needs, and the benefits it brings to the district.



*“During a very difficult period at the end of 2012, it was extremely helpful to receive their invaluable support...”*

*“An external listening ear and sound independent advice was for us an anchoring experience...”*

*“Helping us to keep focused on the overall direction of our Community Interest Company and ...”*

*helping to ensure that we were able to move forward.”*  
**UK Recovery Federation**

## **Social Enterprise in Lancaster District**

Lancaster is at the northern end of Lancashire. It has a unique mix of coastal communities, the city itself, and surrounding beauty spots, moorland and farming with a large rural hinterland. Strategically located (on the M6 and West Coast mainline), and with an imposing castle and historic street plan, Lancaster District has a diverse population of around 130,000, and covers 222sq miles.

The tourism, retail, service, health and education sectors are Lancaster's main income generators. It does not have a recent history of large-scale manufacturing or a sufficiently large urban conurbation to drive its own economic growth. The renowned University of Lancaster, though somewhat isolated on its out of town campus, remains a significant engine of new ideas and creative people and an important local employer, with potential to significantly support the SE sector.

There are, however, some significant challenges, especially around health and wellbeing issues facing local residents. The nearby towns of Morecambe and Heysham, and parts of Lancaster too, have pockets of significant deprivation. The housing market remains depressed, with many poor-quality private rented properties and too many empty shops.

A strong social enterprise sector helps to create a strong community, one that can meet the unique challenges the city faces as it adjusts to a smaller public sector and a growing elderly population. Many residents desperately need social support, and the environmental and climate change challenges of the future are considerable. While Lancaster needs the innovation, enterprise and social support that come from SE, it has few big exemplar organisations. However, it does have a highly motivated community and voluntary sector, a vibrant history of social and environmental activism, and a lively cultural scene.

To achieve their full potential in tough economic times SEs need to be helped to get started, need to be nurtured to grow, and then need to be celebrated.

That is what Lattice Works achieved, successfully and efficiently, done by offering an innovative mix of high quality, yet highly accessible, SE support. In this report we aim to give a flavour of how Lattice Works worked to realise these outcomes.

It is important to note that the programme occurred in the context of a major shift in the way local authorities engage with 'not for profits', and huge cuts in funding for the community, voluntary and faith sector. This was due in large part to the austerity programme of the Coalition government, announced in the wake of the private financial sector's banking crisis.

Alongside the massive private market failures that led to the austerity cuts there was, of course, also a long-recognised need for the not for profit sector to develop a greater sense of autonomy and to do this through building a sustainable funding model that was not dependent on grants.

In future, the available funding will be commission and contract-led, requiring strategic thinking and checking of performance, more innovation, collaboration, flexibility and increased capacity to internally manage the enterprise.

Grant dependence and a lack of innovation have long dogged the not for profit sector. The growing culture of outsourcing public spending, whilst on the surface presenting new opportunities for social enterprise, is generally skewed towards the interests of larger, externally-based and profit-driven private providers.

Whether it was a Charity, Company Limited by Guarantee, Community Interest Company (CIC) or a Cooperative, Lattice Works could help.

## **The people behind Lattice Works**

**Jez Hall** is a director of Shared Future CIC and coordinated the Lattice Works programme, as well as providing direct support to organisations. Jez has spent over 15 years working in the not for profit sector, helping groups of all sizes achieve their goals. He draws on his experience of working in community infrastructure support; being a local



volunteer, a non-executive director of a Primary Care Trust, a SE business analyst with Lancaster University Management School; of coordinating the North Lancashire Social Enterprise network over five years; and is a leading national expert on Participatory Budgeting.

**Mandy Naylor**, via Help Direct, played a significant delivery role by leading the SEED programme and the Direct Investments elements of Lattice Works, as well as increasingly supporting the wider programme delivery in 2013-2014. Mandy is a highly experienced and qualified social enterprise advisor, and has gone on to establish her own consultancy, Latent Promise, which continues to work with Shared Future on the final year of the programme.

**Laurie Smith** supported Jez in the delivery of some aspects of the support such as running Action Learning sets, but also in a strategic and management role. Laurie is also a long-standing director of Shared Future CIC and a veteran of Lancaster University Management School business support and leadership development programmes.

**Kevin Goodall** of Lancaster District CVS undertook work collecting evaluation evidence at the end of the programme. LDCVS also provided in-kind support in terms of time, knowledge, signposting and information sharing throughout the programme.

## **Help Direct**

Due to their existing work in social enterprise development and established local presence the LDLSP nominated Help Direct Lancaster District as a sub-contractor for some of the activities. Mandy Naylor, Social Enterprise Development Manager for Help Direct was appointed to deliver the work. There were three key tasks with which Mandy was charged:

- **Engaging with organisations currently operating a social enterprise model**, or wishing to do so. They would be helped to develop and improve all aspects of their business model and operations.
- **Providing urgent small scale financial assistance** under the Direct Investment programme.
- **Supporting a reference group of key partners** who could support the successful implementation of the Initiative.

## **Value Added as of May 2014**

### **Overcoming our financial constraints.**

The resources of the Lancaster District is significant, and the Lattice Work fund very modest. Each year tens of millions of pounds of taxpayers' money is spent in the Lancaster district on services used by the public. £120,000 might secure a few jobs for a short while, yet the ambition for the programme was to leave a bigger legacy than that.

Given the project was extended into a third year with only minor extra resources its has been a good investment. This extension was done through careful management, partnership working and by using an under-spend on Direct Investments and the Network fund. A partnership with LDCVS yielded around £3,500 in 2013-14, spent on continuing the SEED support. Using local providers, doing a lot of work in house, and leveraging in support from programmes like Start Up Lancashire, delivered by SELNET, all added up to make Lattice Works truly successful.

### **Development Services**

By May 2014 we recorded over 100 individuals and organisations who had received our support. And we believe Lattice Works was directly involved in one way or another in the creation of 18 new social enterprises.

Each of these clients received at least one face to face advice session and follow up action plans. Many had repeated interventions looking issues such as business plans, publicity or premises. Many also attended Thrive! training received PIP or Direct Investment funding or benefited via networking. Most later expressed greater confidence in becoming sustainable.

Through the SEED and Seedlings programmes hundreds of hours of face to face support were given to established not for profits in the District. Over 46 organisations met with Mandy Naylor to review their organisational strategies and plan new income generating services.

Some interventions meant group work with management committee members and numerous site visits. Training offered where appropriate, signposting provided to other help, or help given with marketing and communications.



## **Funds distributed**

Funds were distributed in two ways to local organisations. Through PIP awards and through Direct Investments. £50,000 was initially planned for PIP and £20,000 for DI. In the end due to low demand a proportion of the DI fund was used for an extra round of PIP awards.

## **The PIP programme**

Small awards (up to £2k)	£16,664	in 12 awards
Larger awards (up to £5,000)	£44,869	in 11 awards
<b>Total PIP awards</b>	<b>£61,533</b>	

## **Direct Investments**

Directly to organisations	£ 6,703	to 19 orgs
To buy specialised training	£ 1,844	
<b>Total DI awards</b>	<b>£ 8,547</b>	

## **Employment created or secured**

The resources of the programme do not stretch to do the detailed monitoring of larger funding programmes, so only anecdotal or qualitative estimates can be given. Many of the extra hours worked, either voluntarily or paid, will be part time, or embedded within another role.

However given the number of new start ups and organisations assisted SFCIC would estimate that up to 5 Full time equivalent jobs were created during the life of the project. Potentially another 5 were secured.

Many 100's of days of volunteer and in-kind work will have also been generated through new start-ups or attracting new kinds of non-financial support. Or as a result of new income, as many supported organisations went on to obtain contracts, win tenders or bid successfully for grants.

## **Awareness of SE locally**

Calculating how the profile of SE has risen because of our work is difficult. But a crude measure might be obtained by seeing the growth of the NLSE news bulletin, produced by SFCIC, over the life of the programme.

The NLSE mailing list has risen from Sept 2011 to the end of May 2014 from around 50 SE's and 30 wider stakeholders to around 90 SE's and 60 wider stakeholders.

## The Lattice Works Process

### Setting the Scene

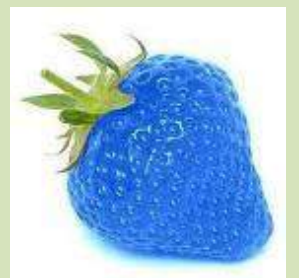
Lattice Works was funded by Lancaster District Local Strategic Partnership (LDLSP) and was delivered by Shared Future CIC, in collaboration with Help Direct. It sought to provide accessible practical support, including where necessary financial help, to develop and grow new methods of income generation in locally based SEs.

Lattice Works offered a range of support options and was designed to connect with other help available to the voluntary and community sectors, and so not to duplicate existing services. We worked closely with Lancaster District CVS (LDCVS), Social Enterprise Lancashire Network (SELNET) and the members of the North Lancashire Social Enterprise network (NLSE). We established our social enterprise stakeholder reference group to help guide our work, and our performance was overseen by Lancaster City Council.


The LDLSP was dissolved in March 2012, though Lattice Works continued to deliver positive outcomes for the District. The Lattice Works programme was originally intended to finish in March 2013. By carefully managing its limited funding it continues to run until at least Easter 2014, albeit in a slimmed down form.


By the end of the main programme Lattice Works had assisted around 90 new or existing organisations and had given out around £70,000 in direct financial aid. Alongside financial assistance there was a significant amount of other forms of support, including networking opportunities, information giving and a range of accessible events and training, which contributed towards in richness of the programme.

Through carefully integrating the different elements of Lattice Works, though building on good local knowledge and through our personal commitment to SE, we were able to offer a seamless support structure for social enterprise, from the smallest to the largest, across the district.





## Lattice Works consisted of 6 initiatives


 **Seedlings:** SE start up and signposting .  
Designed for individuals, volunteers, smaller organisations or new groups that want to know a little more about social enterprise. Provided as a community service by Shared Future CIC.

 **SEED:** SE Encouragement and Development  
1-to-1 advice and support for existing organisations. Often the first point of contact with Lattice Works, SEED helped explore if the social enterprise model could help develop a more financially sustainable organisation and then supported them through the transition process. Sometime this support was financial, through small scale assistance with marketing costs, training or paying for professional help. This was done by what were known as **Direct Investments**, which were generally of £500 or less.

 **PIP:** The Participatory Investment Programme  
A democratic way to invest our limited resources in locally based social enterprise. Development awards up to £5k were available for new services and products, decided by the real experts - those actually undertaking social enterprise and community led initiatives in Lancaster district.

 **Thrive:** Group based training workshops  
Suitable for those considering social enterprise for the first time, or established social enterprises planning to establish a new service.

 **Action-Learning:** Peer leadership support  
Collaborative peer-to-peer leadership and strategic skills learning programme.

 **Network:** Collaboration for sustainable SE  
Built on the existing North Lancashire Social Enterprise network. Network creates opportunities to collaborate, share skills and address changing needs in our community. This includes promoting better understanding about social enterprise, primarily through the North Lancashire Social Enterprise network and website.

## Timeline and key milestones



Spring 2011	<ul style="list-style-type: none"><li>➤ Tender documents released</li></ul>
Summer 2011	<ul style="list-style-type: none"><li>➤ Programme design and contract</li><li>➤ Branding and information finalised</li></ul>
October 2011	<ul style="list-style-type: none"><li>➤ Programme launched</li><li>➤ One to one assists build up rapidly</li></ul>
November 2011	<ul style="list-style-type: none"><li>➤ Thrive 1 begins</li><li>➤ PIP round 1 opens for applications</li></ul>
Jan 2012	<ul style="list-style-type: none"><li>➤ Thrive 1 completed. A number go on to establish their enterprise or apply for PIP</li><li>➤ Action Learning Pilot Set underway</li></ul>
Feb 2012	<ul style="list-style-type: none"><li>➤ PIP round 1 complete, with £25,000 distributed to 9 out of 14 applicants.</li></ul>
April 2012	<ul style="list-style-type: none"><li>➤ Over 60 people and organisations have registered to receive support</li></ul>
May 2012	<ul style="list-style-type: none"><li>➤ Workshops on crowdfunding, marketing and business writing delivered to over 40 organisations</li></ul>
June 2012	<ul style="list-style-type: none"><li>➤ 4<sup>th</sup> North Lancashire Social Enterprise festival. Over 70 conference attendees take part in key note speeches, discussion groups, mini trade fair and over 15 free masterclasses</li></ul>
July 2012	<ul style="list-style-type: none"><li>➤ Second PIP round distributes another £25,000 to 8 organisations from 12 bids</li></ul>
December 2012	<ul style="list-style-type: none"><li>➤ Thrive 2 underway</li><li>➤ PIP round 3 open for applications</li></ul>
February 2013	<ul style="list-style-type: none"><li>➤ PIP round 3 distributes final £12,800 to 5 out of 10 of the applicants</li></ul>
March 2013	<ul style="list-style-type: none"><li>➤ Formal end of programme. Over 90 registered requests for support processed</li></ul>
April 2013 until March 2014	<ul style="list-style-type: none"><li>➤ Continuation and legacy building phase, including final report, report on 21<sup>st</sup> Century SE Innovations and closing conference.</li></ul>

## Training and Development

### SEED                      Organisational                      Development Programme

#### **Social Enterprise Encouragement and Development**

1-to-1 advice and support for existing organisations delivered by Mandy Naylor. Focussing on an existing social enterprise wanting to explore new sources of income, or a charity or community group looking at the social enterprise route to sustainability, the SEED programme helped clarify aims and ambitions, write business plans and restructure the organisation, and ultimately decide what actions to take to become sustainable.

#### **Enterprise**

Helping organisations to diversify income and become more effective through trading, contracts, or other 'non-grant' income. SEED sought to find a way forward that was right for each individual organisation, regardless of size.

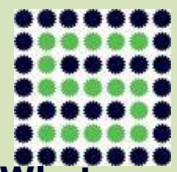
#### **Encouragement**

We aimed to understand organisations as well as we could, so that we could offer focussed support around their individual needs. Friendly and approachable, we also supported organisations through any setbacks along the way.

#### **Development**

SEED covered many aspects of becoming more financially sustainable, from reviewing finances and cash flow, to looking at management structures and business plans, to investigating market opportunities for a new service. Taking action was still down to the individual organisation, but we could help them plan the most effective way to do it.

SEED was a gateway to our **Direct Investments** programme: small scale financial investment in the form of a grant managed by SEED programme lead Mandy Naylor. Through SEED Mandy identified where direct investments were most needed and oversaw their distribution.



#### **What people said about Seed**

*“I can get people involved but what stops me from making the next step is how to make it a social enterprise, which is where Lattice Works has been really helpful.”*

**David Higham,  
from The Well**

*“Help Direct have been responsive and importantly for us able to understand our winding path and philosophy of making the path as we walk it.”*

**Alistair Sinclair,  
of UK Recovery  
Federation**



## Seedlings: Start up advice and signposting

Seedlings was designed for individuals, volunteers, smaller organisations or new groups that wanted to know a little more about social enterprise.

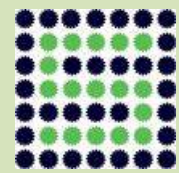
Provided as a service by Shared Future CIC from their 'match-funding' for the programme, Seedlings involved face-to-face meetings with individuals or newly formed groups. These took place in accessible venues across the district. We went to them wherever possible. No limits were placed on the amount of support offered, each inquiry being provided help on a case-by-case basis.

Following a brief informal chat designed to diagnose the key aspects of the inquiry, contact was maintained by regular email and phone exchanges, and lots of encouragement to network. In every case people were signposted to the Thrive! programme, were encouraged to approach other support agencies, or invited to network with others at events. They also able to receive information via the NLSE network's regular email bulletin. Lattice Works was careful not to replace existing structures, but to add value to them.

Our service was designed to make people feel part of a wider movement, to become aware of the culture and opportunities available to local social enterprises, and to leave a legacy in a larger and stronger SE network. We worked hard to build up the successful NLSE network, using some of the in-kind match-funding provided by Shared Future CIC, as well as unallocated 'network' funds carried over into 2013.

Our free informal advice and signposting saved clients time and money when setting up their social enterprise. We offered basic guidance on which legal structures to consider and which to avoid, on start up funding and recruiting support and how to begin a business planning process.

Where appropriate Mandy Naylor was involved to look at the more in depth issues around their business strategy. Occasionally they were passed to other agencies, when that meant they could obtain specific and appropriate help and advice. A friendly place to go to get basic advice and encouragement was often all that was required.



### What people said about Seedlings

*"We wanted the new charcoal burning service to be part of an educational project for schools to learn about the environment. When I needed support I felt quite confident that Jez or Mandy would be there for us"*

**Dave Kirsopp,  
Thumbprint**

*"Made me realise how difficult it would be doing everything on my own"*

**Gary Foxcroft,  
WHRIN**





## Thrive! Social Enterprise training programme.

Jez Hall of SFCIC designed and delivered Thrive! Free to attend for all not for profit organisations in Lancaster District, Thrive! offered a new or existing organisation practical and high quality support to understand the new 'culture' of social enterprise. Using a mixture of short presentations, discussion groups and practical exercises, it was also an opportunity for lots of networking with people with a similar outlook and in a similar position to their own.

Thrive! was delivered as five interactive, enjoyable half days. Participants were encouraged to sign up for all five sessions as each session built on the last. There was a limit of 20 places. Up to two individuals (or sometimes more) could attend from each organisation (which proved really helpful when bringing a new project to fruition).

Thrive! ran three times, once in the winter of 2011, again in late 2012, and in Autumn 2013 a shortened session was run that condensed the five themes into one day. It was delivered at a number of central Lancaster locations, like Lancaster Library and at local social enterprise One Voice. Before each session participants encouraged to arrive early to meet and talk through projects with others on the course.

Each of its five half day sessions, delivered around two to three weeks apart, covered a different theme:

**1: Introduction to Social Enterprise:** What it is, why it is needed, what the future holds for the Third Sector and voluntary organisations.

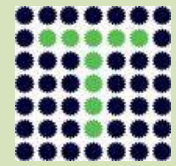
**2: Culture:** Introducing social enterprise into your organisation, governance, sustainability and managing risk.

**3: Vision:** Building a long term vision for success. Motivation, innovation and purpose

**4: Communication:** Marketing and market research, branding, collaboration and partnership

**5: Enterprise:** Money matters and business planning, proving your success, income through trading, loans and grants.

Many of the organisations on Thrive! were new start-ups that went on to establish themselves as successful SE's.



### What people said about Thrive!

*"Enjoyable and enlightening"*

*"Participative, it made me think"*

*"Very informative, with a fun element"*

31 organisations trained

Involving over 40 individuals

11 Training sessions delivered: over 6 days



## Action Learning

A group-based programme that helps resolve real-world business issues and develop leadership skills through peer-to-peer interaction. Our Action Learning Sets brought like-minded social entrepreneurs, leaders and managers together to work through real issues in a collaborative, supportive yet challenging way.

The Action Learning programme was facilitated by Laurie Smith, a director of Shared Future. Laurie was an expert facilitator with experience of running more than 40 sets for social enterprises and small businesses.

Shared Future went on to be awarded a contract by the Northern Leadership Academy, via Lancaster University and in association with SELNET, to run two more sets for SE's. Proving the model was successful and also bringing extra resources to SEs in the district and the wider county of Lancashire.

## Network Development

When designing their SE initiative LDLSP made early contact with the NLSE network. Supporting established social enterprises and avoiding creating unhelpful competition was at the heart of the initiative. Using resources from Lattice works, NLSE was able to make significant improvements to their website (work done by a locally based social enterprise Hatua, set up with the help of Lattice Works.) Information sharing improved through a new e-bulletin, that went to many more individuals and organisations, on a more regular basis. We enabled a range of events, such as the 2012 NLSE conference, held at Lancaster and Morecambe College. That included an afternoon of free taster workshops attended by many local organisations and showcased the best of Social Enterprise.

Partnerships with SELNET and LDCVS extended the reach of the programme, and the Reference group was instrumental in managing the Networking funding within Lattice Works.

Inevitably there was some displacement of existing NLSE activity during Lattice Works, as members of the Network stepped back from their advocacy role to concentrate on their own sustainability in times of austerity.



*Action Learning is a proven, practical way to solve problems, and of exploring new ideas and opportunities, as well as developing leadership and management skills.*



*The mission of the NLSE network is empowering our local communities to work together and invest in greener, fairer enterprise.*

*Finding solutions through co-operation, sustainable trading, community ownership, and mutual support.*



## Investing in Social Enterprise

### PIP: Participatory Investment Programme

PIP is a funding programme with a difference. Through small financial investments our aim was to make organisations more sustainable, avoid the need to access grants, and become more effective. PIP used a unique presentation format based on Participatory Budgeting (see [www.pbnetwork.org.uk](http://www.pbnetwork.org.uk)). PIP allowed applicants the opportunity to really explain their ideas and to enable people just like them to choose where the investment went. Though a development grant we called it social investment. Beneficiaries paid back via the benefits they brought to Lancaster District.

In the PIP programme, unlike other grants, half the scoring was decided by the applicants using a form of participatory budgeting. The remaining score came from a more usual small panel of experts, drawn from our reference group (though in the final round they did their scoring alongside the community). The process showed democracy in action and a passion to succeed by bidders was essential.

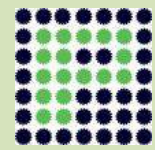
### Purpose of a PIP investment:

Applicants needed to show how PIP funding would enable them to generate future income through directly trading in goods and services. Or perhaps through new public sector contracts. Most important was that their proposal was:

- Meeting a real need in Lancaster District;
- Innovative and able to be scaled up to bring sustainable impacts;
- Enabling the applicant to create new types of income to sustain or grow their organisation.

PIP was run three times, and in each round improvements were made to ensure a fair, accessible and transparent process. PIP was about uncovering and supporting a passion to make a difference. We wanted everyone involved to be inspired by what could be done; a bit like finding the real X factor in a social enterprise.

Though it is impossible to fund everyone, and there was concern about having to present, participants overwhelmingly valued the PIP approach, feeling it worked better than a traditional grant programme.



### What people said about PIPs

*“Funding allowed us to explore how we could generate an income from providing a service as training or on a consultancy basis.”*

**Unique Kidz**



*“Very good, very democratic and very fair”*

**Thumbprint**

*“Without this type of funding our CIC might never of got off the ground”*

**ACCESS**

## Direct Investment

### Aim

The aim of the Direct Investment pot was to provide an easy way to quickly access small amounts of funding that could make a real difference to an organisation's sustainability and ability to generate income.

### Criteria

The fund was designed for small/urgent requirements from established organisations: larger requests with no time implications were instead referred onto the larger PIP programme for peer and expert assessment. All applicants had to have a SEED meeting to discuss the idea before they could make an application.

### Process for selecting

Mandy Naylor managed and only referred to Jez Hall ones that she was satisfied with. Applicants had to provide a written description of why they wanted the money with supporting evidence of costs etc. where applicable.

There was a mechanism in place for larger amounts to be referred to the reference group for further oversight: however this was not required as larger requests all ended up participating in PIP.

### Key benefits

- Enabled organisations to improve their public image
- Improved skills and income generating potential
- Improved ability to promote services and generate income

### Learning points

The fund was initially undersubscribed, probably because the small amount of each grant meant that it was of little use to established organisations with at least some reserves: however new start up organisations – where that small amount of money made a real difference – were not eligible to apply under the original delivery plan.

A large amount of the fund was therefore made available for a third round of PIP in January 2013, and the rules were relaxed from April 2013 on the remaining funds to allow new start up SEs to apply.

### Summary of Direct Investments

19 organisations were successful in receiving Direct Investment.

The total awarded was around £6,700

The average amount given out for was around £350

It was awarded for help with promotional materials, new websites, signage and training.

2 organisations applied more than once at different stages of development.

1 organisation used it for legal advice to improve its eligibility for grants.

## **Governance**

### **Shared Future CIC**

The Lattice Works programme is delivered by Shared Future CIC (SFCIC), a social enterprise formed in Lancaster in 2009. SFCIC was initially established with 4 directors, all with a history of living or working in Lancaster District, and with long experience of, and a commitment to, community development and organisational learning. They wanted to assist other organisations, primarily but not exclusively in the not for profit sector, to improve on how they operated, and so be able to make a greater impact and thereby become more sustainable. Jez Hall took on day to day responsibility to coordinate Lattice Works and reporting on activity.

As part of the contract underpinning Lattice Works a proportion of the total £120,000 was allocated for this work, amounting to approximately £20,000 over two years. Under the terms of the contract and delivery plan SFCIC undertook to provide significant added pro-bono time in terms of delivery on top of its coordination role. Primarily in the provision of the Seedlings start up programme, and also in the running of the PIP process (using Participatory Budgeting techniques.).

SFCIC did this partly because of its commitment to the local SE community, but also because it was a new organisation keen to grow through demonstrating its ability of managing a complex project and innovate new ways of working. SFCIC wanted to bring together a range of techniques that it felt would add value to what could have been a simple grant funding distribution programme.

### **Help Direct**

Under the terms of the tender awarded to SFCIC it was requested to partner with one of its potential competitors for the contract, namely Help Direct. Approximately a further £20,000 was allocated by the accountable body (LDLSP) to pay for the time for Mandy Naylor to provide support to established organisations under the SEED programme, to lead on the distribution of Direct Investments, and support a reference group.

## **Stakeholder relationships**

Inevitably when one off funding is available, and in the midst of a financial crisis, change of government and policy within local councils keeping any programme of track can be difficult. It was always recognised the funding available would not be sufficient for the potential demand. There was always a tension between slicing the funding into small chunks and spreading it thinly (and fairly), concentrating the available resource sufficiently to bring measurable impact and also preventing direct competition between SE's over limited money. Lots of people had to be engaged with the programme in multiple ways. Inevitable when balancing the triple bottom line of financial, social and environmental sustainability that underpin social enterprise.

The potential for disappointment, confusion and duplication was reduced through some detailed initial planning between James Sommerville (the LDLSP manager and later Lancaster City Council Partnership manager), Jez Hall (of SFCIC) and Donna Studholme (of Help Direct). This included a carefully prepared delivery plan and a Memorandum of Understanding between SFCIC and Help Direct.

Their relationship has proved to work very well. Considerable commitment was shown by Mandy Naylor to working with Jez Hall and SFCIC. When the delivery role of Help Direct ceased at the end of March 2013, Mandy launched herself as an independent consultancy (known as Latent Promise) and she became increasingly important in the success of the programme in the final extra year of its existence (2013-2014).

Central also to the success of the delivery team was the time and commitment put in by the wider stakeholders to the programme, represented both through the LDLSP performance management group (and later, after it was wound up in 2012 officers of Lancaster City Council.) Also essential in keeping the programme on track was the close relationship between SFCIC, members of the NLSE (which provided an essential sounding board for Lattice Works) and SELNET. And of course individuals and organisations that returned evaluation reports, contributed towards case studies and attended networking events.

## **The Reference Group**

Maintaining communication and strategic vision was essential to Lattice Works, and this was facilitated by its reference group, that met approximately quarterly throughout the life of the programme. Though not having formal governance responsibility the Reference Group members provided essential guidance to SFCIC. Its aims and objectives were:

- To ensure a dialogue can take place between key stakeholders within the sector to support implementation, and ensure that the programme does not duplicate support that is already available
- To provide feedback on planned developments and interventions by those providing the service
- To inform the matrix [criteria and weighting] used to administer the Participatory Investment Programme.
- To highlight any organisations they believe should be considered for support, whether existing or emerging social enterprises
- To help raise awareness of social enterprise, and specifically the SEI, with both partners and the general public

Members of the SEI Reference Group included representatives from the LDLSP, SFCIC, Help Direct, Furniture Matters (a local and established social enterprise), Lancaster District Community and Voluntary Solutions (LDCVS), SELNET, NLSE and Community Futures. As well representation from officers of Lancashire County Council.

Membership inevitably fluctuated, but at the time of producing the interim report (Dec 2013) the Reference Group was still operating, beyond its expected lifetime.

## **Reporting**

Formal reports on activity were originally submitted to the LDLSP Performance Management group, and latterly direct to officers of Lancaster City Council. Reports include this interim report, as well as quarterly monitoring returns, and regular face to face meetings.

A final stakeholder event is being planned, a year after the formal end to the programme.

## Case Studies

### Case Study 1: ACCESS Counselling

Affordable Counselling and Caring Emotional Support Services (ACCESS) provides counselling support to those in need at a range of price points depending on circumstance and need. Linda Chapman, one of its founders, worked as a counsellor at a charity, where she offered mediation to families and young people. Whilst the service was running she realised that parents needed to use it as well, so offered counselling to them too. Linda says "if you can work with a parent to prevent their breakdown, you can also prevent a family from breaking up".

#### Why was support needed?

The charity that Linda had worked for could no longer fund the service and made Linda and the rest of the team redundant in September 2011. A desire to continue providing the service led Linda and her colleagues to explore their options to establish their own counselling service.

Linda accessed Lattice Work's SEED programme as she had a desire to form the new service as a social enterprise, having seen first-hand what had happened to an organisation reliant upon grant funding. "Around one hundred people had to be turned away, it was horrific and some of the people we had started working with had started opening up and it was harmful to just stop that service."

#### How did Lattice Works help?

Linda was referred to the Seedling part of Lattice Works run by Jez Hall from SEED, and was supported to develop their initial idea leading to the incorporation of Affordable Counselling and Caring Emotional Support Services (ACCESS) CIC in February 2012. The organisation has since been awarded funding at two rounds of the PIP element of Lattice Works – one to get established, the other to increase the potential user base of the service.



*"We wanted to become self-sustainable,*

*we didn't want to rely on funding*

*because the service we had before was and if it stops you have no service."*



*"as a social enterprise the organisation belongs to the community."*  
Linda Chapman,  
ACCESS

The second award of funding from PIP meant counsellors from ACCESS were able to access training that widened the age group they are able to work with, so rather than being limited to working with young people aged 14 and over, they are now able to work with children as young as six – which will provide the potential to generate a larger income and the likelihood of becoming a financially sustainable organisation.

## **Outcomes for the organisation**

The organisation opened to the public at the end of April 2012. There are now 12 people involved with running the project and in the current year they are on course to work with over ninety individuals and families.

## **What ACCESS said**

Linda believes that *"Without Lattice Works, ACCESS would never have got off the ground. We would never have found the funding to start, we wouldn't have known what type of company to register as or even how to do it."*

## **Case Study 2: Get It Loud In Libraries**

Get It Loud In Libraries (GILIL) is an innovative project that puts on live music gigs in libraries, encouraging their use by young people as well as providing a safe, alcohol-free local venue. Young people are also involved in the organisation, promotion and reporting of the events. The project has hosted many award-winning names such as Adele, Bat for Lashes, Villagers and Low.

## **Why was support needed?**

Stewart, the lead person on the project, first contacted Mandy Naylor in February 2012. The project, which had been funded by Lancashire County Council (LCC) for the last few years, was no longer able to be supported within the county budget. Stewart was looking for support to enable him to 'spin out' GILIL as an independent social enterprise.

## **How did Lattice Works help?**

Mandy met with Stewart four times between February and October 2012, as well as providing support by phone and email. Initial discussions centred on both the political

*My principal issues have been around establishing social enterprise, limited company or charity status for my developing project*



*Mandy Naylor's knowledge of likeminded and similar people working in my sector and her ability to link strategists, workers and project managers together to strengthen individual ideas and projects ...*

*Lattice Works have been hugely helpful for Get It Loud In Libraries. Stewart of GLIL*



aspects of broaching a spin out with the council, and the finances needed to develop and sustain a new social enterprise. Despite some early difficulties, Stewart was able to gain agreement to use the GILIL brand. Finances were initially problematic, with a private backer (who had also become a director of GILIL) who agreed to provide match-funding for a successful Arts Council grant pulling out in July 2012. At the final meeting with Stewart and his co-director Emma in October 2012, Mandy clarified issues involved in setting up a CIC, advised getting support from a solicitor for this following the previous issues with the private backer, and also using this to clarify the relationship between LCC and the new social enterprise.

## **Outcomes for the organisation**

Loud In Libraries CIC incorporated in March 2013 and has been successful in attracting £100K from PRS and Arts Council England to extend and develop a programme of events for the next two years. The directors have a clear focus on generating income over this period with events taking place across the North West. Without the spin off, the GILIL project, which has been globally recognised as incredibly successful at making libraries relevant and attractive to young people, would have ended.

## **What GILIL said**

*Mandy has offered considered and detailed advice around this area in which I have no experience or expertise. She has shown huge understanding for my aims and objectives and has offered tips to support my crafting an ambitious new strategy and managing change as I progress forward with the programme...*

## **Case Study 3: Strawberry Fields**

Having supported young people on the verge of school exclusion, people in prison and people in recovery – Paul Ireland and Bernie Slater realised that in order to be sustainable they needed to do things slightly differently so developed a complementary training element for their organisation, Strawberry Fields Training, in order to become a social enterprise.

## **Why was support needed?**

*"If we had stayed as a limited company we might not have made it this far and the organisation probably wouldn't still be going*



*whereas being a community interest company enabled us to receive grants that gave us the security to operate for at least eighteen months."*





When faced with the prospect of redundancy from their jobs at a charity, rather than look for alternative employment Paul and Bernie endeavoured to provide a similar service to that which they had many years experience of delivering, but by doing so in a financially sustainable way. After initially having set up as a private limited company due to being unaware of the options available to them for being a social enterprise, the Thrive! programme introduced them to the idea of forming as a community interest company (CIC). Had it not been for the guidance received from Lattice Works, Paul Ireland believes that his life now could be radically different.

## **How did Lattice Works help?**

Of the Lattice Works training workshops they participated in, Paul said: *"Thrive is where we learnt all of our business knowledge, and Strawberry Fields Training got set up because we were all on that programme."* After the Thrive programme, Strawberry Fields Training successfully applied for PIP funding towards premises, IT equipment, resources and health and safety equipment. Paul credits the training and funding received from the programme as being the catalyst for the organisation being where it is now.

As well as creating paid employment and apprenticeships, over a hundred people have benefitted from the activities offered by Strawberry Fields Training and over sixty have received training in mentoring, befriending and other areas. In a relatively short amount of time the organisation has discovered social enterprise and gone on to be a major player in its sector.

## **Comments from Strawberry Fields:**

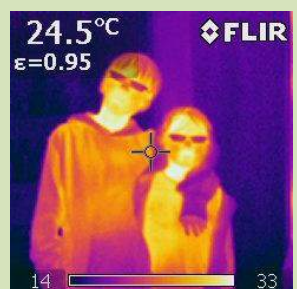
Paul modestly claims that: *"never in my wildest dreams would I have thought we would be doing so well in our first year of business."*

## **Case Study 4: LESS UK Ltd**

LESS is a CIC based in Lancaster that seeks to educate people and organisations about sustainable lifestyles, and provides services and projects to support this mission, including a Home Energy Service and 'Off the Ground' encouraging people to grow their own fruit and vegetables.



*"Lattice Works has effectively set up the school, which now funds itself"*  
Paul Ireland,  
Strawberry Fields



## **Reason support requested**

Support was originally requested in November 2011 by Kathy, Coordinator of the Home Energy Service, to review the planned income stream for both of LESS's core projects.

Mandy Naylor met with various members of LESS seven times between December 2011 and June 2012. The first meeting with the coordinators in December 2011 highlighted the fact that the overarching strategy for the organisation was not clear to them, making it difficult for them to determine how they should seek to develop their individual projects. This was followed by a meeting with the coordinators and the Chair of the directors to discuss the need for a strategic organisational review and how this could be done.

## **How did Lattice Works help?**

At the request of LESS, Mandy facilitated a full strategic away day in May 2012 with staff, volunteers and directors. A lot of ideas were generated at the meeting, many of which highlighted the desire from front-line staff for directors to set more defined strategic objectives and be more heavily involved in the day to day operations of the organisation.

These ideas were followed up in later meetings. LESS also were able to access £4,880 of PIP support in January 2012 to develop a charged-for thermal imaging service, plus another £350 in June 2012 (following attendance at the LW Marketing Workshop in May) to assist with producing publicity leaflets for this service and the organisation as a whole.

## **Outcomes for the organisation**

LESS launched the thermal imaging service in June 2012 and although originally only funded for six months' salary the service is still in place, offering a charged-for service for businesses and households that are able to pay.

The organisation has a range of options and methods for strategic development, including the levels of support for each option, which they can tap into when time permits.



*Lots of praise for the PIP event!*  
Kathy New,  
LESS



*'It was very useful having Mandy facilitate our away day and come to the directors' meeting afterwards.'*

## Case Study 5: The Well

The Well is an asset-based community development social enterprise that supports people in recovery. David Higham, founder of The Well, describes it as *"a community within a community which provides a place where people can come regardless of their recovery journey"*.

### Reason support requested

David is himself in recovery and was inspired to set up the social enterprise because *"there was nothing available to do in the local area of an evening or at the weekend that wasn't drug or drink related, where you could meet up and see another person in recovery or somewhere you could just walk in and feel accepted and part of and not feel threatened and insecure but made to feel welcome."* Having been informed of Lattice Works by a colleague from the UK Recovery Federation, another Lancaster-based social enterprise, The Well launched in November 2012 after several months of developing the initial idea.

### How did Lattice Works help?

David became involved with the SEED programme as he acknowledged:

Team members from The Well went on to participate on the Thrive programme to look at ways to develop the social enterprise. The organisation was successful in applying for funding from the PIP programme, which it is hoped will raise awareness of the service and encourage more people in recovery to be part of the support network that the social enterprise facilitates, which will in itself help to generate an income for the organisation.

### Outcomes for the organisation

Looking ahead, David hopes that there will be a Well in every area in Lancashire, each of which will be employing people in recovery. In order to do this he acknowledges that he will need to be able to access relevant support in order that he is able to develop it as a social franchise.

### Comments from The Well

David's speaks from the heart when he states: *"I truly believe that recovery is possible and that is what The Well offers. And where Lattice Works has been really helpful."*



Watch the Well Promo DVD  
<http://www.youtube.com/watch?v=OGAD5Bzlle8>

*"I can tell you about recovery and I can get people involved*

*but what stops me from making the next step is how to make it a social enterprise"*  
David Higham,  
the Well



The Well Dave Higham  
Chairman

## Legacy

Given the programme is continuing into 2014 it may be too early to fully describe the legacy. However the most significant delivery is complete. SFCIC hopes this report demonstrates the breadth of activity that occurred. One of the intentions, long outliving the LDLSP itself was to create a platform or legacy for social enterprise. Undoubtedly there is more social enterprise activity underway.

More particularly we are encouraged by the innovation and creativity that has ensued. All in the face of a growing crisis in the funding of not for profit organisations and public services nationally. The District lost some notable and long standing not for profit bodies during the time of the programme and many more suffered significantly. However we believed the picture could have been much worse without our interventions.

We are proud of the partnerships we have made and the opportunities for new networking, and of trying new ideas. Like Participatory Budgeting, used to distribute PIP funding, Social Media support, Crowdfunding, and Action Learning.

In particular, we hope to leave a future legacy in the form of new learning. In late 2013 the programme commissioned a major report: *21<sup>st</sup> Century Innovations in Social Enterprise*, from Owen Dowsett. This explored ideas as diverse as 3-D printing, Co-Production and Social Impact Bonds. The intention being to hold a closing conference for Lattice Works, where we hope these ideas will be picked up, and also inform future support for the sector.

A number of organisations we supported have been shortlisted or been winners of awards. Notably, Unique Kidz and Co, LESS and Strawberry Fields. SFCIC itself was shortlisted in 4 categories in the 2013 Enterprise in Society awards, and gained a high ranking on the TSBSE100 Index.

Stronger links have been built with Lancaster University, both through involvement on the Reference Group, but also through linkage with programmes like Catalyst, the FASS Enterprise Centre and projects like its SE boot-camps.

The Lancaster based ESTA CIC, established as Lattice Works was getting underway has independently been successful in the development of the Ethical Small Traders Association, and through its interest in alternative currencies, organisational time-banking and its Local Economy Trading project. There has been regular interactions and cross over between the work of ESTA and SFCIC, within Lattice Works, within the NLSE and in other ways. Which have been largely complimentary, and shows the vibrancy and commitment that exists in the District.

It's undoubtedly true that running Lattice Works has brought considerable benefit to Shared Future itself, and contributed towards the launch of Latent Promise. Providing a platform at a crucial stage in the development of each, and enabling both to operate over an increasing footprint and collaborate outside of Lattice Works.

However it is impossible to ignore the real challenges the programme has faced and the District will continue to face. Some will hopefully be short lived and relatively minor in significance, though not without bringing their problems.

It is undoubtedly true that as the programme ends there is uncertainty as to the immediate future of the NLSE network. SFCIC has long been central to NLSE, providing coordination support and leadership pre-dating Lattice Works. As Jez Hall has moved out of the District and is unlikely to remain closely involved, and because of the intensity of the support work that's been delivered there is somewhat of a vacuum within the Network, which has largely lost its advocacy and peer support functions.

However funds have been set aside to ensure the network has a foundation on which to re-build, and as activity from Lattice Work winds down we are confident new voices and leadership will emerge. What form the NLSE takes will be decided by those new leaders.

Comparison with other parts of Lancashire show a relatively healthy NLSE and confident SE sector. Many of the other SE in Lancashire are currently pretty dormant. However the financial security for many SE organisations, and therefore the Network itself, remains challenging, as public sector cuts continue to bite year on year.

## Appendix 1: Evaluation and feedback

### Baseline information

When the LW programme began there was little firm data on the size of the SE sector. It was true to say the NLSE mailing list stood at around 40-50 recognised social enterprises. Typically around 10 were active in the network, though greater numbers came out for the annual NLSE festival. It would be reasonable to guess most of these were reasonably long established charities that had a trading aspect to their work.

Growing awareness of SE and confidence in it was a key goal of the programme. In order to track this we recorded responses to our interactions with participants.

### What Social enterprises reported

In our closing survey conducted around March 2013 for the question 'Overall rate Lattice Works' we received an overall average 8.55 out of 10.

### Early in the programme

Question	Rating out of 5
Our organisation is well run and everyone is pulling together	6.7
We're confident about tendering and selling our services	5.2
We raise money from lots of places, with ideas of new places to go	7.3
We work well with local public services and help them succeed too	6.7
We are used to working closely with other organisations	8
We know where to go to get help to improve our social enterprise	5.8
We know what we are about and are good at growing new ideas:	6.8

For the question 'Overall rate Lattice Works' out of 10 we got a score of 8.3

### Late in the programme

Question	Rating out of 5
Our organisation is well run and everyone is pulling together	7.2
We're confident about tendering and selling our services	5.2
We raise money from lots of places, with ideas of new places to go	5.6
We work well with local public services and help them succeed too	6.7
We are used to working closely with other organisations	8.7
We know where to go to get help to improve our social enterprise	8.0
We know what we are about and are good at growing new ideas:	8.7

Our overall rating out of 10 by the end of the programme had risen to 8.9

Looking at the figures above we can see a general increase in the rating SE's gave themselves, and to Lattice Work, especially across some important measures. Where these stayed the same or fell it was most likely because there were more new start social enterprises responding, so they were less likely to be confident about tendering, for example. The austerity programme was also beginning to really bit by 2013, likely to reduce confidence in accessing public money or grants.

## Summary of project evaluation replies

### Responses to the Pip programme

Rating out of 5	Typical responses
Venue	4.4
Content	4.3
Facilitators/ Information provided	4.4
Ability to contribute	4.1
Met expectations	4.0
Good way to make decision	3.5

A range of comments were made on the PIP process:

- *Good to see the variety of projects able to seek funding*
- *Very well organised*
- *We have been successful, but if we had not we may have like some feedback to improve future applications. We may have also found advice about alternative funding beneficial.*
- *We are more than happy with the support we have received since being introduced to the lattice works / PIP programme.*
- *Will allow individuals to train to become trainers with the potential to move into paid employment.*
- *The award will allow us to successfully run, organise and secure the future of what we believe is essential*
- *we now have 20 volunteers / 1 student placement. We have IT in our offices & learning environment which have already started providing an income. We can now hire out our training suite which is equipped with visual and audio equipment, again already producing an income stream.*

Though not everyone was happy with the method to hand out grants:

- *No way of awarding money is ideal and PIP tries to be very fair. Possible improvements could be that organisations in order to be eligible to apply should have had some previous support from Lattice Works to help identify areas for development, rather than just using it as a grant opportunity.*

- *I also think that there should be a higher threshold that people have to pass on the panel section in order to go through to the presentation - that would avoid the risk of completely unfeasible projects being funded because of a personable presenter (which was a risk this time with one project)*
- *I think that it's an odd way to bid for money. How can you know that tactical voting is not going on and that people are voting fairly? I have heard others discuss this also.*

## Responses to Thrive!

Rating out of 5	Round one (Jan 2012)	Round 2 (July 2013)	Round 3 (Nov 2013)
Venue	4.4	4.3	4.9
Content	4.7	4.8	4.8
Presenter	4.7	4.9	5.0
Ability to contribute	4.6	4.5	4.6
Met Expectations	4.7	4.7	4.9
Usefulness of Session	4.7	4.8	5.0

Generally Thrive! comments were very positive and included:

- *Good Structure and balance of group interaction, felt I was able to interact, as well as take on a lot of useful information.*
- *Being able to reflect and test the real world against the theory*
- *Its all learning for me, I feel comfy and will get a lot from this training*
- *Best thing was discovering what others are trying to achieve through social enterprise*
- *Simple explanations for complex concepts, [with] sharing ideas*

## Other Training responses

We ran a few externally trained events, such as on Crowdfunding and also supported social media workshop. Responses to these were good, as reflected in the figures below from the Business Writing workshop

Rating	The content	The presenter	Ability to contribute	Met expectations	How useful
(out of 5)	4.6	4.9	5.0	4.6	4.6

- *Everyone's ideas and information really useful. Mandy's insight and knowledge on the subject was excellent.*
- *Well organised, a good amount of time devoted to each area of discussion. Good use of resources - powerpoint, handouts etc. Very pleased overall!*
- *Confirmation that I am on the right track - some good hints and tips*



## **General Feedback**

Throughout this report we have constantly referenced the words of participants. We are confident that overall the response to the Lattice Work programme has been very positive.

## **Interviews and case studies**

Towards the end of the programme SFCIC commissioned Kevin Goodall at Lancaster District CVS to undertake a number of case studies of organisations that went through the programme. Mandy Naylor and Jez Hall supplemented these with more case studies during their work.

In total 11 case studies were undertaken. A number of these are reproduced earlier in the report. All showed the clients were generally pleased with the support they were given. They also pointed up a number of areas where support would be beneficial going forward. Further details are available on request.

## **Quotes by participants**

Below is a selection of quotes from participants in the online survey asking if they were happy with the programme and any support received.

*"we are extremely happy with the support we received, the concept, the process, the workshops, and the funding / presentation event itself were really good. To be honest I wouldn't change anything. we are even receiving continued support after the event in order to help get us established."*

*"they seem very well organised and friendly, approachable. I don't think they could have done better for me as they didn't know my requirements."*

*"The networking with local social enterprises was invaluable."*

*"Yes. I wasn't keen on the PIP process due to the presentation element, though I did feel good after having done it."*

*"Very happy with Lattice Works. Surprised there isn't a similar support package available to charities locally. Would like the service to continue (with any element of funding if possible) as the support and development part is more important."*

## Appendix 2: Organisations Supported

The following organisations were recorded as having received some kind of support from Lattice Works.

<p>A Giving Thing ACCESS ADHD North West Age UK Lancashire Home Help Service Ageconcern (New SE) Art-Reach AYA DISTRIBUTION Backandbeyond Better With Fairy Cakes Bittern Countryside CIC Carnforth Chamber Of Trade Carpe Diem Gardens Ltd CEEP- Stanley's Youth And Community Centre Centre For Independant Living Project Community Safety Plus DHE Solutions Disability Online Diversity FM Ellel Memorial Institute Trust Employment Support Service Garstang Empty Shops Project Morecambe (Restore More) Enterprise Mentoring Ltd EnterprisingMe Disabled Adults Project ESTA CIC Expert Patients (EPPCIC) Family Noticeboard Food, Health And Reminiscence project Fork To Fork At Thumbprint Fragments At Thumbprint Freewheelers Bicycle Workshop Ltd – Furniture Matters Galgate Pre-School Gladiator Boxing Global Link Go Morecambe Greenco - Community Greengrocer Project Hatua CIC Highfield Regeneration Project Horsability CIC Hua Xian Chinese Society Incredible Edibles Lancaster Joy Craft Stall Key Stage Comics Recovery Cafe Project Lancashire Deaf Service Lancashire Libraries Lancaster Cohousing - Film Project</p>	<p>LDCVS (Accountancy Project) Learning Together LESS UK LGBT Out In The Bay Loud In Libraries Lovemelovelife Ludus Dance Making Space Marsh Community Centre M'dam (Make Do And Mend) Middlewood Trust Morecambe Bay Credit Union Natural Health Service CIC/Tara Project NCBI Ncompass North West Traveller Arts Project North Lancashire CAB North Lancashire Counselling Services One Voice Podecology Positive Futures North West Proper Community Media Ltd REACT Recovery Housing Co-Op Red Rose Ju-Jitsu Club RE-UP/UKRF Seeds For Change Lancaster Shared Future CIC Shattering Images Signposts SPICE Network Sprout Training Spud Club (Community Land Project) Strawberry Fields Training Ltd The Almond Tree The Centre @ Halton The Key - Domestic Violence Training Project The Making Place The Plot The Well - Recovery Social Cafe Project Time And Place Transition Lancaster CIC Transition Morecambe Unique Kidz And Co Universal Learning Solutions Witchcraft And Human Rights Information Network Your Choice</p>
--	---

## Appendix 3: Financial report

<b>Fund</b>	<b>Starting Allocation</b> (at Sep 2011)	<b>Spent</b> (up to March 2013)	<b>Spent</b> (Apr2013-Mar 2014)	<b>Balance at end of project</b>
<b>Lattice Works Coordination and Delivery:</b>	£20,000.00	£15,821.14	£3614.03	564.83
<b>SEED 1-1 Support Fund (Help Direct):</b>	£20,000.00	£20,000.00	£0.00	£0.00
<b>Direct investment Fund (Help Direct):</b>	£20,000.00	£4,981.67	£3564.91	£0.00
Transferred to PIP fund during 2013 [not added to total]	£0.00	[11,453.42]	£0.00	£0.00
<b>PIP Fund:</b>	£50,000.00	£50,000.00	£0.00	£0.00
Additional from DI fund (Feb 2013)	£0.00	£11,453.42	£0.00	£0.00
Misc small donation (in 2012)	£40.00	£40.00	£0.00	£0.00
<b>NetWork fund</b>	£10,000.00	£386.00	£9,614.00	£0.00
<b>Total for Programme</b>	<b>£120,040.00</b>	<b>£102,682.23</b>	<b>£16,792.94</b>	<b>£564.83</b>

### NLSE and Networking resources

The NLSE retains funds remaining to sustain it going forward. It has currently £708.75 on which it can draw. This is from historical funds of its own, topped up by a allocation from the Network Fund.

This money is being held by Shared Future in a reserve fund, with the intention it will be used during the 2014 to 2015 financial year.

### Total Remaining

Shared Future is holding £564.83 in its Lattice Work fund as of end of April 2014. It is proposed this will be spent on maintaining communications via a Lattice Work e-bulletin, with information also sent via the NLSE.

An e-bulletin will be circulated approximately every 2 months by Shared Future. There will be other ad-hoc communication with the Lattice Work contact list as required.

Shared Future is also expecting to receive around £3500 during 2014 to 2015 financial year via a voluntary sector support contract held by LDCVS with Lancaster City Council. This is being used to provide ongoing SE support, under an agreement held with LDCVS.