

This document has been co-produced between the  
Barcelona City Council, the Solidarity Economy Network  
and various community projects.

**COMMUNITY BALANCE**  
**QUESTIONS GUIDE**  
2019 Campaign

## **Table of contents**

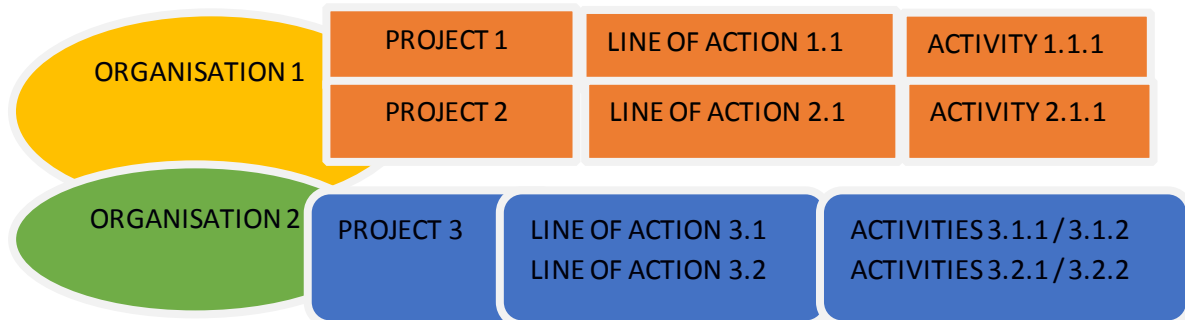
INTRODUCTION	3
ORGANISATION LEVEL:(equivalent to Basic Social Balance)	7
QUESTIONNAIRE FOR THE ORGANISATION	7
1. GENERAL INFORMATION	7
2. FINANCE AND MONEYSMAKING POLICY	8
3. EQUITY AND DEMOCRACY	12
4. ENVIRONMENTAL SUSTAINABILITY	15
5. SOCIAL COMMITMENT AND COOPERATION	18
6. JOB QUALITY	21
PROJECT LEVEL:	24
QUESTIONNAIRE FOR THE ORGANISATION	24
1. GENERAL INFORMATION	24
2. FORGING TIES WITH THE TERRITORY	24
3. SOCIAL IMPACT AND RETURN	27
4. INTERNAL DEMOCRACY AND PARTICIPATION	31
5. CARE FOR PEOPLE, PROCESSES AND THE ENVIRONMENT	34
QUESTIONNAIRES TO BE ANSWERED BY INTEREST GROUPS	38
EXTERNAL QUESTIONNAIRE FOR PEOPLE/ORGANISATIONS FROM THE LOCAL COMMUNITY	38
EXTERNAL QUESTIONNAIRE FOR PEOPLE LINKED TO THE PROJECT (volunteers, activists, and users)	39
GLOSSARY	41

## INTRODUCTION

In this document, we review the entire Community Balance (CB) questionnaire, question by question, explaining the meaning of each question and the information it requires. It is therefore a good idea to read through the entire list of questions you will find before filling out the questionnaire on the application in order to facilitate compiling the data and distributing the tasks among the various people involved in producing the CB.

The CB is a self-diagnostic tool that organisations use to assess how they operate in relation to different environmental, social, and good governance questions. It should be noted that due to the specificities of community management, it is necessary to differentiate between two levels of evaluation in the CB: organisation and project. Any given organisation can manage more than one project. The aim is to obtain a segregated perspective of both the organisation managing the project and the projects under development, whether they are connected to the same physical space or not. Where a project is being managed by more than one organisation, the body that coordinates and centralises aspects at an internal level will be responsible for entering the project data into the application.

Each project is made up of different lines of action, with various activities in each line of action. This hierarchy is important in relation to the information required in project level questionnaires.



At both an organisation and a project level, there are two categories of balance: basic and complete. An organisation may choose to do either of the two types at the organisation level and then independently opt for one of the two types for the project level.

Regarding the complete version of the CB's organisational structure (for both organisation and project), the organisation level consists of 6 blocks and 3 types of external questionnaires, which should be filled out by the interest groups (workers, volunteers, and clients). The only obligatory external questionnaires for finishing the balance are those concerning job quality. The project level consists of 5 blocks and 2 types of external questionnaires relating to measuring impact, one for local community organisations and the other for natural persons who are users of or are connected to the project.

The following table shows the blocks and sub-blocks that contain the different questions that make up the 60 final indicators referred to in the **organisation level**.

<b>GENERAL INFORMATION</b>	<b>Questions</b>
Members of the organisation (conditional depending on legal status)	7
<b>FINANCE AND MONEymaking POLICY</b>	
Average workforce size	1
Financial information	9
Moneymaking policy	1
<b>EQUITY AND DEMOCRACY</b>	
Participation	2
Transparency	2
Diversity	2
Positions of responsibility (for all the organisations)	2
Wage equality	2
Non-sexist and inclusive language	1
<b>ENVIRONMENTAL SUSTAINABILITY</b>	
Environmental policy	2
Water and energy consumption (in offices)	3
Paper consumption (in offices)	1
Waste prevention and selective collection	1
Other items consumed	2
Mobility	1
<b>SOCIAL COMMITMENT AND COOPERATION</b>	
Participation in social networks and movements	1
Financial contributions to solidarity causes	2
Social market	3
Contribution to commons	2
<b>JOB QUALITY</b>	
Health and safety at work	1
Regulation of work contributions	1
Training	1
Care and compensations	2
<b>TOTAL NUMBER</b>	<b>52</b>

The following table shows the blocks and sub-blocks containing the various questions making up the 56 final indicators referring to the **project level**.

<b>GENERAL INFORMATION</b>	<b>Questions</b>
General qualitative questions in the block	3
<b>FORGING TIES WITH THE TERRITORY</b>	
General qualitative questions in the block	2
Representation, legitimacy and involvement in the territory and/or sector	6
The project's relationship with official representatives of the territory	2

The project's relationship with the productive and commercial fabric of the territory	1
The organisation's involvement in the community and association network dynamics of the territory	3
Receptiveness	2
<b>SOCIAL IMPACT AND RETURN</b>	
General qualitative questions in the block	2
The social base of the project	12
Fostering community and association network dynamics	4
Fostering community behaviour	2
Fostering community economies	5
<b>INTERNAL DEMOCRACY AND PARTICIPATION</b>	
General qualitative questions in the block	2
Decision-making	8
Diversity	4
Ability to put forward new ideas	1
Transparency	2
Participation	2
Openness and accessibility	1
<b>CARE OF PEOPLE, PROCESSES AND ENVIRONMENT</b>	
General qualitative questions in the block	2
Collective sustainability	2
Diversity and accessibility	2
Organisational sustainability	1
Environmental sustainability	1
Economic sustainability	9
<b>TOTAL NUMBER</b>	<b>81</b>

In addition to all the information relating to the project that the coordinating organisation must provide, there are 2 types of questionnaires on the internal and external evaluation of the social impact and return of the project, addressed to:

- People who are project users or connected to it
- Community organisations

Any project that wishes to complete the CB needs an organisation to report for it. This means that initial registration on the IT tool falls to the organisation that will report on the various projects. Once the balance category for the organisation level has been chosen, and the registration option for wishing to report on community management projects has been marked, the option to register different projects will be activated.

Each activated project requires a specific registration file, and the selection of the category to be used, either basic or complete. In this way, the project level can be completed for each community management project the organisation wishes to report on.

Due to the CB currently being part of the Solidarity Economy Network (XES), the organisation level corresponds technologically to the Social Balance of the XES since they share technical indicators in both the basic and complete categories. Therefore, registration is formalised at the Social Balance level of the XES, and the project level of the CB is activated once the organisation has marked that it wishes to report on community management projects. The manual refers to the organisation and project

levels of the CB, understanding that this internal equivalence between the nomenclatures used must be carried out.

## ORGANISATION LEVEL:(equivalent to Basic Social Balance)

### QUESTIONNAIRE FOR THE ORGANISATION

#### 1. GENERAL INFORMATION

In this section, the organisation must provide **quantitative information** about the organisation's social base. The questions are as follows:

In this block, the organisation must provide qualitative information about the organisation's social base.

Code	Wording of the question	Explanation of what information must be reported
q0101	<b>Number of members (not including workers who are members)</b>	Indicate the number of non-salaried organisation members and/or collaborators (e.g. consumer, services, exploitation or professional in the case of work cooperatives, consumer, services and second-tier cooperatives; associates in the case of associations; and collaborative members according to the nature of the activity of the organisation).
q0102	<b>Organisation members (a person can only be entered in one field, never two)</b>	To be answered only by second and third-tier organisations State the number of member companies or associations
q0103	<b>People who take part representing the board / member organisations</b>	To be answered only by second and third-tier companies and associations Indicate the number of people representing the member organisations that take an active part in decision making and executive areas. It is important to have this figure in order to know the number of people actively taking part in the organisation, so that the indicators that require this number may be calculated.
q0104	<b>Number of board members</b>	To be answered only if you are a foundation. State the number of people making up the foundation's board of trustees.

q0105	<b>Number of workers who are members</b>	State the number of workers who are also members of the organisation.
q0106	<b>Number of workers who are not members</b>	Indicate the number of salaried workers who are not members.
q0107	<b>Number of volunteers</b>	To be answered by all the associations which, due to the nature of their activity, regularly use volunteer workers. Indicate the number of people who take part in the organisation's structure as voluntary workers.

## 2. FINANCE AND MONEYSMAKING POLICY

This chapter compiles the organisation's financial data, which is needed to calculate organisation level indicators. There are a series of entries for quantitative information.

Code	Wording of the question	Explanation of what information must be reported
q1101	<b>Total number of jobs expressed in complete working days during the last financial year</b>	<p>The equivalent number of complete working days must be reported for all the people who had a contract of employment with the organisation during the year. The total is then calculated. Cooperative-member workers and self-employed workers are also counted, even though they do not have a contract of employment. People who are active in work and training programmes are not included. For individuals, i.e. self-employed individuals working exclusively for the organisation (regardless of the number of hours worked) are counted as a complete working day.</p> <p>Example calculation: If someone has worked 50% of the working day for 12 months, the equivalent in complete working days would be: 1 person * 12/12 (months worked / 12 months of the year) * 50/100 (% of the working day/100) = 0.5 (50% of a complete working day, all year).</p>



q1102	<b>Sum of the gross annual salary of all the workers, broken down by gender</b>	<p>Add up the salaries of all the workers in the organisation (broken down by gender) during the last financial year, without including compensations.</p> <p>This information should be easily accessible for the organisation's accounting and/or taxation area or manager, by means of the accounting or taxation documents for the financial year in question.</p>
q1107	<b>Sum of the wages not paid by the organisation due to sick leave or leave of absence.</b>	<p>Add up all the wages the company or association has saved because of sick leave or leave of absence (broken down by gender). These payments are assumed by the Social Security. This information should be easily accessible for the organisation's accounting and/or human resources area or manager, by means of employment documents (TC1, TC2, salary list, etc.).</p>
q1201	<b>Total annual expenditure - in €</b>	<p>State the organisation's expenditure in euros for the last financial year. The total expenditure for the last financial year can be found in the Profit and Loss Statement under Code 6 of the General Accountancy Plan, given that it is the sum of all the accountancy entries in Group 6 "Purchases and Expenditure" (it therefore includes wages and salaries, rentals, acquisition of goods and services, etc.). This information should be easily accessible for the organisation's accounting and/or taxation area or manager, by means of the accounting or taxation documents for the financial year in question.</p>

q1202	<b>Total annual amount spent on the acquisition of goods and services - in €</b>	Indicate the amount in euros paid to the organisation's various suppliers for the acquisition of goods and services. By the acquisition of goods and services we understand the group of purchases made for buying goods (office materials, industrial supplies, computer equipment, etc.) and the money spent on contracting services (utilities, communication services, IT services, etc.). These are essentially the amounts associated with Accounts 60 and 62 of the General Accountancy Plan. This information should be easily accessible for the organisation's accounting and/or taxation area or manager, by means of the accounting or taxation documents for the financial year in question. This amount must be lower than the amount stated in the previous section concerning total annual expenditure.
q1206	<b>Total annual expenditure on the workforce - in €</b>	The annual cost of the workforce is obtained from the total annual amount in Account 64 of the General Accountancy Plan.
q1203	<b>Total annual revenue - in €</b>	Indicate the organisation's total revenue in euros for the last financial year. The organisation's revenue may come from the sale of goods or services, from subsidies, donations, membership fees, etc. The sum of all of these is the amount that must be entered in this box. The total revenue for the last financial year can be found in the Profit and Loss Statement under Code 7 of the General Accountancy Plan, given that it is the sum of all the accountancy entries in Group 7 "Sales and Revenue". This information should be easily accessible for the organisation's accounting and/or taxation area or manager, by means of the accounting or taxation documents for the financial year in question.
q1204	<b>Total annual amount from the sale of goods and services - in €</b>	This refers to the revenue received from sales or the provision of services (which is essentially equivalent to the amounts associated with Account 70 of the General Accountancy Plan). Revenue generated by the provision of services to public administrations must also be included where there is a corresponding invoice.

q1205	<b>Total amount of subsidies awarded to the organisation/project - in €</b>	This refers to the sum of the amounts that appear in the Profit and Loss account in the 740 accounts. This does not include revenue generated from the provision of services to public administrations where there is a corresponding invoice. It will include all the subsidies awarded and attributed to the financial year under evaluation, irrespective of whether they have been paid or not during the current financial year.
q1207	<b>Annual average of financial resources deposited in financial institutions - in €</b>	State the average annual amount, in euros, deposited in the various bank accounts owned by the organisation. Given that the money deposited in current accounts varies during the year, a small calculation must be made to get the average amount. We propose the following formula to make the calculation: take the balance of each current account on the last day of every quarter, add up the four balances and divide the figure by 4: the result is the annual average of money deposited in that current account. If the organisation has more than one current account, it must calculate the average values of each account. Regarding the accounting, the bank balances are entered in Account 57 of the General Accountancy Plan. This information should be easily accessible for the organisation's accounting and/or taxation area or manager, by means of the accounting or taxation documents for the financial year in question.

q1401	<b>How were the profits from the last financial year distributed?</b>	<p>This refers to the way in which profits were distributed within the organisation. This scenario is possible when the close of the financial year results is a positive figure. Some organisations, regardless of their articles of association and/or their legal status, must consider whether there are any specific restrictions or indications for its distribution.</p> <p>The possible answers are: (indicate "NS/NR" where the result is not positive)</p> <ul style="list-style-type: none"> <li>- Networks and/or associations or other initiatives for the construction of common goods.</li> <li>- Reserves, compensation for losses and/or own investments (equipment, training, materials, new projects, etc.).</li> <li>- Sharing among the owner members, associates and collaborating members.</li> <li>- Sharing among non-owner workers</li> <li>- Financial investments in ethical financial institutions (Coop57, Fiare and/or Triodos).</li> <li>- Financial investments in organisations outside the SSE.</li> </ul>
-------	---	---

### 3. EQUITY AND DEMOCRACY

The equity and democracy indicators aim to measure the degree of direct and representative democratic quality the organisation allows all its members, whether they are associated or contracted. It also aims to measure the level of an organisation's interculturality and the degree of equal opportunities enjoyed by its workers. You must answer all the following questions of a **quantitative** nature:

Code	Wording of the question	Explanation of what information must be reported
q2101	<b>Number of people that took part in drafting the Management Plan and the annual budget</b>	State, in whole numbers and broken down by gender, the total number of people that took part in drafting the management plan and the annual budget for the previous financial year. You can get this information by reviewing the minutes of meeting and the list of contacts to whom the provisional documents were emailed during the drafting of the management plans and the annual budgets.

q2102	<b>Number of people who that took part in approving the Management Plan and the annual budget</b>	State, in whole numbers and broken down by gender, the total number of people that took part in approving the management plan and the annual budget for the previous financial year. You can obtain this information by reviewing the minutes for the meeting or meetings where the management plans and annual budgets were approved.
q2202	<b>Are figures for salaries and other remunerations available to the workers?</b>	Indicate whether salaries and other remunerations are public knowledge within the organisation or not. In order to know whether they are public knowledge, there must be a periodic or regular communication system with all the members of the organisation, where any member may obtain this information (intranet, members' section of the website, internal email, etc.). Where the answer to this question is affirmative, you must be able to prove the validity of the affirmation with one of the instruments listed above.
q2203	<b>Have you published the data for the last financial year's social balance on your website?</b>	This question refers to whether the results of the social balance or audit have been made public by the organisation, and specifically whether they have been posted on the organisation's website. The possible answers are: We have published / disclosed them both to organisation members and externally. We have disclosed them to organisation members. We have not published them. We have not published them because this is the first year we have done the social balance.
q3102	<b>Number of workers who are non-EU nationals</b>	Non-EU nationals are those people who do not have the nationality of any EU country.
q3103	<b>Number of workers who are racialised</b>	When we talk of "racialised" people, we are referring to those who, because of their cultural and physical characteristics, among others, are classified into a group that is considered inferior and a minority and are discriminated against for this reason (colloquially speaking, "not white").

q3201	<b>The number of people who occupy positions of responsibility in the organisation's work structure, broken down by gender</b>	State, in whole numbers and broken down by gender, the number of people occupying positions of responsibility in the organisation's work structure. Positions of responsibility are understood as executives and middle management, whether they occupy a political/corporate post or not. This data can be obtained from documents that show the internal organisation chart, especially the minutes of meetings which contain the latest approved internal work structure.
q3202	<b>The number of people who occupy corporate/political posts in the organisation</b>	State, in whole numbers and broken down by gender, the number of people who occupy corporate/political posts in the organisation. Depending on your legal status, you must indicate the number of people on the Board of Directors (associations and federations), governing board (cooperatives), Trust (foundations) or supervisory board (social enterprise). This information can be obtained by consulting the minutes from meetings or general assemblies in which changes to or renovations in the organisation's governing bodies have been agreed, and the organisation's articles of association.
q3301	<b>Highest pay (gross pay per hour worked) – in €</b>	State the highest pay in the organisation; this must be calculated as gross pay per hour worked, because if the gross monthly or annual salary is stated the differences in remuneration could be due to differences in hours worked. When measuring the highest salary, in addition to gross salary, remunerations for attending meetings or other activities people have access to due to occupying a specific position within the organisation must also be considered. These would be remunerations for representing the organisation that are paid for by other organisations. In order to include these payments in the calculation of gross pay per hour worked, we recommend adding the money received for representing the organisation to the gross annual salary and dividing that total by the annual hours stated in the contract of employment or the employment agreement (depending on each individual case). We recommend consulting both the pay slips and Account 64 for wages and salaries according to the General Accountancy Plan.

q3302	<p><b>Lowest remuneration (gross pay per hour worked) – in €</b></p>	<p>State the lowest remuneration in the organisation; this must be calculated as gross pay per hour worked, because if the gross monthly or annual salary is stated the differences in remuneration could be due to differences in hours worked. To make this calculation, we recommend dividing the gross annual salary by the annual hours stated in the contract of employment or the employment agreement (depending on individual cases). Remunerations received by trainees or people doing work experience are excluded from this indicator. We recommend consulting both the pay slips and Account 64 for wages and salaries according to the General Accountancy Plan.</p>
q3401	<p><b>Does the organisation use non-sexist and inclusive language?</b></p>	<p>The use of non-sexist language refers to the conscious adoption of strategies aimed at the egalitarian use of language that includes women and men on equal terms. The purpose of this is to avoid, as far as possible, the use of terms that explicitly or implicitly refer to a single gender, except where this is due to positive measures favouring women. For example, instead of using generic names in your documents, such as “workmen”, we would use “workers”, and/or “workforce” and/or “staff” and/or “personnel”. For more information, please consult the following Spanish manuals: "Cuida tu lenguaje, lo dice todo" [Careful with your language, it says everything] "Manual de Estilo para una Comunicación Incluyente" [Style manual for inclusive communication], "Guía de lenguaje no sexista de la UNED" [UNED guide to non-sexist language].</p> <p>The options are as follows:</p> <ul style="list-style-type: none"> <li>● Not normally</li> <li>● The documents used by the organisation are written in inclusive language</li> <li>● Inclusive language is used in both written documents and spoken language.</li> </ul>

#### 4. ENVIRONMENTAL SUSTAINABILITY

The environmental indicators aim to measure some basic environmental variables in order to obtain an image of the organisation's environmental impact. The **quantitative** information is composed from the following questions:

Code	Wording of the question	Explanation of what information must be reported
q4101	<b>Do you have an environmental management policy, action plan or system?</b>	State yes or no, depending on whether there is a formal environmental management policy, action plan or system. Environmental management policies, action plans and systems aim to establish measures that reduce the organisation's environmental impact. These plans can be formalised through standardised, audited management tools (ISO 14000, EMAS) or by means of the organisation's own environmental management and improvement system. In either of these cases, the management policy, action plan or system should have a publication that showcases the planned objectives and actions.
q4102	<b>Do you carry out an internal control of CO2 emissions?</b>	This refers to whether the organisation compiles a record of the greenhouse gas emissions caused by its regular activities, which may come from various sources of energy expenditure: electricity, natural gas, propane, diesel and/or kilometres travelled.
q4201	<b>Do you use energy saving and energy efficiency practices and procedures?</b>	State yes or no, depending on whether the organisation carries out actions that favour energy saving and efficiency. Ideally, these measures should be listed in the environmental action plan, although the actions may be developed without any need for an action plan. It would be a good idea to have a formal support for the implemented measures, such as registration forms that specify the investments made and the savings generated.
q4206	<b>Do you use water saving and water efficiency practices and procedures?</b>	State yes or no, depending on whether the organisation carries out actions that encourage savings and efficiency in the use of water. Ideally, these measures should be listed in the environmental action plan, although the actions may be developed without any need for an action plan.



q4208	<b>Do you contract all your electricity from suppliers who generate 100% of their power from renewable sources, which are certified and have a guarantee of origin?</b>	Guarantees of origin are instruments which prove that a quantity of electricity has been produced by renewable sources or high-efficiency co-generation, anywhere in Spain. The Electricity Guarantee of Origin and Labelling system was implemented by the National Energy Commission (CNMC) in December 2007, with the aim of providing consumers with detailed information about the origin of the energy they receive and its associated environmental impact. Energy suppliers who make origin-guaranteed contributions to the grid are reviewed every year. Further information can be found in this link: <a href="https://gdo.cnmc.es/CNE/resumenGdo.do?informe=garantias_etiquetado_electricidad">https://gdo.cnmc.es/CNE/resumenGdo.do?informe=garantias_etiquetado_electricidad</a> . Contracting part of the service is only applicable to organisations with two or more work centres.
q4301	<b>Do you regularly and for most purposes use paper that is recycled and/or has a sustainable forestry exploitation certificate?</b>	Indicate yes or no, depending on whether the organisation normally uses paper that is recycled or has a sustainable forestry exploitation certificate in its offices. This information can be obtained from invoices from the company supplying the paper or from the packaging of five-hundred sheet packs. In the case of white (non-recycled) paper, the only forestry certificate accepted is the FSC (Forest Stewardship Council; <a href="http://www.es.fsc.org">www.es.fsc.org</a> ). PEFC (Spanish Association for Forestry Sustainability) certificates are not accepted because they are involved in major controversy.
q4401	<b>Do you use formal waste prevention practices?</b>	State yes or no, depending on whether the organisation carries out actions aimed at preventing the generation of waste. Ideally, these measures should be listed in the environmental action plan, although the actions may be developed without any need for an action plan.
q4503	<b>When acquiring a product, are responsible consumption criteria considered?</b>	This refers to the acquisition of all types of products (food, office supplies, furniture, etc.) and services, provided that suitable products are on the market, involving ecological production or manufacturing criteria, local production, Fair Trade, second hand, etc. This link leads to a summary of those criteria: <a href="http://opcions.org/consum/3-claus-del-consum-conscient/">http://opcions.org/consum/3-claus-del-consum-conscient/</a>

q4504	<b>Do you take environmental criteria into consideration when organising events in your organisation?</b>	The greening of an event consists in including environmental criteria so that its environmental impact is as small as possible. These criteria may affect various fields: the location of the event and the registration and management of participants' mobility; catering, items given to participants, accommodation, publicising the event. And some of the practices include: the use of compostable or reusable glasses and plates, ecological and/or locally-produced food, avoiding food and materials waste, recycling left-over resources, accessibility by public transport, etc.
q4601	<b>Do you include, offer or facilitate any alternative/help in matters concerning transport?</b>	This includes all kinds of documented measures such as: car-sharing, public transport, bicycles for workers, bicycle parking places, total or partial funding of transport tickets, economic or in-kind remuneration for workers who walk to work, financial support for car sharing, awareness-raising campaigns, etc.

## 5. SOCIAL COMMITMENT AND COOPERATION

Social commitment indicators aim to measure the organisation's sensitivity towards its surroundings, in terms of participation, involvement, and social empowerment of the territory. In this block, you must answer a qualitative question:

Code	Wording of the question	Explanation of what information must be reported
q50B	<b>Number of stable social transformation networks and initiatives that the organisation actively takes part in (indicate the complete name of the network, not the acronym)</b>	Name the social transformation organisations, networks, federations or initiatives that the organisation has actively taken part in during the year. Participation is considered to be active when a minimum of 30 hours a year is dedicated to it and/or a quota is paid. This participation must appear in the minutes of meetings or in the organisation's annual plan.

The quantitative fields are broken down into the following questions:

Code	Wording of the question	Explanation of what information must be reported
q5202	<b>Are you members of, or do you operate with, ethical and solidarity financial organisations?</b>	State yes or no, depending on whether the organisation is a member of, or operates with, any ethical financial organisations. Ethical financial organisations are considered to be any of the following: COOP57, FIARE, OIKOCREDIT and TRIODOS BANK. In the case of operating with any other ethical financial organisation, write its name in the space provided at the top of the page.
q5204	<b>Annual average of financial resources deposited in ethical financial organisations - in €</b>	Indicate the average amount of euros deposited in the bank accounts owned by the organisation that are associated with ethical financial organisations. Ethical financial organisations are considered to be any of the following: COOP57, FIARE, OIKOCREDIT and TRIODOS BANK. If operating with any other ethical financial organisation, write its name in the space provided at the bottom of the page. Given that the money deposited in current accounts varies during the year, a small calculation must be made to get the average amount. We propose the following formula to make the calculation: take the balance of each current account on the last day of every quarter, add up the four balances and divide the figure by 4: the result is the annual average of money deposited in that current account. If the organisation has more than one current account associated with ethical finance, it must calculate the average of the average values for each account. Regarding the accounting, the bank balances are entered in Account 57 of the General Accountancy Plan. This information should be easily accessible for the organisation's accounting and/or taxation area or manager, by means of the accounting or taxation documents for the financial year in question.
q5302	<b>Total annual amount of the acquisition of goods and services from organisations belonging to the XES social market</b>	The organisations belonging to the XES social market can be found in the social market catalogue ( <a href="http://mercatsocial.xes.cat/ca/cataleg-dorganitzacions/">http://mercatsocial.xes.cat/ca/cataleg-dorganitzacions/</a> ), in the XES social organisation directory ( <a href="http://xes.cat/socies/">http://xes.cat/socies/</a> ), and on the Pam a Pam solidarity economy map ( <a href="http://pamapam.org">http://pamapam.org</a> ).

q5305	<b>The organisation cooperates with others that provide the same products or services:</b>	<p>The organisations you cooperate with do not necessarily have to belong to the social and solidarity economy or be located in the same territory. This indicator aims to discover the degree of cooperation between organisations in the same sector, thereby reducing competition with each other. These collaborations must be documented in the minutes of work meetings, joint projects, rental or purchasing contracts, etc.</p> <p>The possible answers are:</p> <ul style="list-style-type: none"> <li>- Sharing venue</li> <li>- Sharing knowledge</li> <li>- Sharing management</li> <li>- Sharing projects</li> <li>- Not cooperating</li> </ul>
q5306	<b>Total cost of purchasing goods and services from non-profit organisations (which DO NOT belong to the social market or the XES)</b>	<p>This refers to non-profit organisations, entities which do not share out the surplus from the financial year, either because their legal status does not permit this (association, foundation, work placement company, social initiative cooperative, etc.) or because their articles of association explicitly state this. This refers to the acquisition of all kinds of goods and services. Purchases made from companies in the same business group or public administrations are not included in this section.</p>
q5501	<b>In your activity, do you generate any type of goods, services or materials that you make freely available to commons and/or creative goods or knowledge under free licences such as Creative Commons?</b>	<p>This is asking about the free availability of generated goods, services or materials. It does not refer to the fact that these need to be registered under open source licences, but that they are made available to, or can be freely used, by third-party persons. For further information:  <a href="https://ca.wikipedia.org/wiki/Creative_Commons">https://ca.wikipedia.org/wiki/Creative_Commons</a></p>

q5502	<b>Indicate what your commitment to open source software is:</b>	<p>You can find the most common open source software tools in the following link:  <a href="https://tec.lleialtat.cat/formacio/eines-lliures-per-la-privacitat-i-la-libertat">https://tec.lleialtat.cat/formacio/eines-lliures-per-la-privacitat-i-la-libertat</a></p> <p>The possible options are:</p> <ul style="list-style-type: none"> <li>- We do not use open source software</li> <li>- We use open source office-suite programs on a regular basis and in most cases.</li> <li>- Apart from office-suite programs, we use professional open source programs (graphic design, accounting management, and so on) on a regular basis and in most cases</li> <li>- Most of the organisation's computer operating systems are open source.</li> </ul>
-------	--	--

## 6. JOB QUALITY

The job-quality indicators aim to measure the organisation's ability to provide for the well-being and development of its workers, based on the project's sustainability. The part of the questionnaire to be completed by the organisation has the following **quantitative**: questions:

Code	Wording of the question	Explanation of what information must be reported
q6202	<b>Do you take active preventative measures and/or measures to promote health in your place of work?</b>	<p>State yes or no, depending on whether the organisation carries out practices aimed at promoting health in its work centres. There are two types of possible measures: 1. Preventative: educating people to avoid health problems by controlling situations of occupational risk or by avoiding possible consequences through providing information and training about occupational risks in their workplace. 2. Promoting health: educating workers so that they can adopt healthier lifestyles through providing information about healthy lifestyles regarding diet, physical activity and the consumption of tobacco, alcohol and other drugs.</p>

q6601	<p><b>Does the organisation have an internal regulation or protocol that includes measures for improving the conditions established in the implementation agreement?</b></p>	<p>State yes or no, depending on whether the organisation has an internal regulation or protocol which sets out, in writing, the procedures and protocols that should be followed in terms of the organisation's industrial relations. These relations may be regulated by an employment agreement or be specific to the organisation, but in order to answer in the affirmative improvement must have been made to one or more of the regulated rights (sick leave, leave of absence, leave, holidays, overtime, etc.) with respect to the reference agreement.</p>
q6701	<p><b>Which of these measures is applied to foster training among the organisation's workers?</b></p>	<p>This refers to specific company policies aimed at improving the professional capacities of its workers in areas and/or skills pertaining to the organisation. In other words, training courses concerning the workers' personal life are excluded.</p> <p>The possible options are as follows:</p> <ul style="list-style-type: none"> <li>- Training timetables are included in the working day and financial assistance is provided to cover the cost of the course</li> <li>- Training timetables are included in the working day or financial assistance is provided to cover the cost of the course</li> <li>- Work schedules are adapted to facilitate training</li> <li>- Training for workers is not considered</li> </ul>
q6801	<p><b>Does the organisation consider measures that improve the leave established by law in terms of work-life balance?</b></p>	<p>State yes or no, depending on whether the organisation has an internal regulation which states, in writing, the procedures and protocols to be followed regarding work-life balance (e.g. extending paid maternity, paternity and/or nursing leave). In order to answer in the affirmative, there must have been improvements concerning Act 39/1999 of 5 November (BOE Nº 266 of 6 November 1999), the labour reform approved by Royal Decree-Law 3/2012 of 10 February, which involved making changes to the Workers' Statute, and Act 3/2007 of 22 March concerning equality between men and women.</p>

q6802	<b>Do you generate spaces for workers' emotional support and care in relation to their situation in the working environment?</b>	State yes or no, depending on whether the organisation's workers have a regular formal setting where they can share their experiences and personal situation in the working environment. These settings may take various forms: rounds of emotional expression at the beginning or end of meetings, a committee or people responsible for emotional care in the organisation, etc. The existence of these mechanisms for care and emotional expression must be recorded in the minutes of meetings, the organisational chart or internal regulations, depending on the form they take.
-------	--	--

## PROJECT LEVEL:

### QUESTIONNAIRE FOR THE ORGANISATION

#### 1. GENERAL INFORMATION

In this section, the organisation must facilitate the entering of the information referring to each project listed and selected in the data registration file. The requested information is **qualitative** because it is especially important for the organisation to introduce itself in its own words. This introduction must be brief and in writing. The three questions are as follows:

Code	Wording of the question	Explanation of what information must be reported
q00D	<b>How would you briefly describe the final project undertaken and its contribution to the community?</b>	Describe your project (*see glossary), its objectives and its main contributions to the community, as a project that identifies with the perspective of community management.
q00E	<b>What improvements made to the project during the last financial year are you most satisfied with?</b>	Explain the internal improvement practices implemented by your project during the last financial year which you feel most satisfied with. These may be practices relating to the various aspects evaluated at the project level: territorial background (*see glossary); social impact and return; internal democracy and participation; care for people, processes and the environment.
q00F	<b>In your opinion, what aspects of the project have room for improvement?</b>	Explain the operational aspects of your project which, in your opinion, need to be improved, from a community management perspective. For example, relating to the various aspects evaluated at the project level: forging ties with the territory; social impact and return; internal democracy and participation; care for people, processes and the environment.

#### 2. FORGING TIES WITH THE TERRITORY

This section lists relevant data relating to how the projects developed by the organisation seek to forge ties with the territory. The first questions are mostly quantitative, and the block concludes with two qualitative questions.

Regarding the **quantitative** information, the questions are as follows:

Code	Wording of the question	Explanation of what information must be reported
q12003	<b>Name the local and/or sectoral networks and initiatives that are promoted or led by the project in an effective way</b>	State the complete name of the local and/or sectoral organisations, networks, federations or initiatives (*see glossary) that have been actively promoted or led by the project during the year.



q12004	<b>Name the local and/or sectoral networks and initiatives in which the project participates in an effective way</b>	State the complete name of the local and/or sectoral organisations, networks, federations or initiatives that you and your project took part in during the year. The difference between participation and leadership or promotion is the degree of pro-activeness of the project regarding the promotion of these initiatives.
q12005	<b>Total number of stable local and/or sectoral networks and initiatives promoted / led and participated in by the project</b>	State the total number of networks and initiatives promoted / led and participated in by the project described in the two previous points.
q12006	<b>Name the organisations, commercial establishments and companies of the territory's productive and commercial fabric with which you have undertaken joint activities</b>	Name the organisations, commercial establishments and companies of the territory's productive and commercial fabric with which you have undertaken joint activities (*see glossary).
q12007	<b>Total number of organisations, commercial establishments and companies of the territory's productive and commercial fabric with which you have undertaken joint activities</b>	State the total number of organisations, commercial establishments and companies of the territory's productive and commercial fabric with which you have undertaken joint activities (*see glossary).
q12008	<b>Number of member organisations only from the territory / sector ---&gt;NOT PEOPLE</b>	State the total number of organisations in the territory that are members of the project (organisations that form part of the management platform). Include only those that are based in the territory (neighbourhood, district or municipality, according to how you define your reference territory) or, in the case of sectoral organisations, those from the same sector which are members of it. The total number of member organisations is requested in another question.
q12101	<b>State the type of formal and non-formal district/city council bodies in which the project participates</b>	Select one or more options from the proposed list that refer to the type of formal and non-formal district or city-council bodies in which your project is involved. The possible answers are as follows:  <ul style="list-style-type: none"> <li>● Sectoral councils</li> </ul>

		<ul style="list-style-type: none"> <li>● Neighbourhood councils</li> <li>● Committees</li> <li>● Working groups</li> <li>● Hearings</li> <li>● Others (please specify)</li> </ul>
q12201	<b>Total number of joint activities with organisations and operators in the territory's productive and commercial fabric</b>	State the total number of joint activities undertaken with organisations and operators in the territory's productive and commercial fabric, such as associations, commercial establishments, etc. For example, participating in decorating the street or the bar during the town's annual festival, commercial establishments donating products for activities, organising outdoor neighbourhood activities (local commerce routes), etc.
q12102	<b>Total number of joint activities with the territory's official representatives</b>	State the total number of joint activities carried out with the territory's official representatives, such as schools, neighbourhood councils, etc. We understand activities as being groups of actions (within each project we understand that there are lines of action or working areas, and activities within these specific actions)
q12301	<b>Total number of activities undertaken during the year</b>	State the total number of activities undertaken by the project during the last financial year.
q12302	<b>Describing the activities carried out during the year, including joint actions</b>	Briefly explain all the activities undertaken within the project, including those carried out jointly with other organisations, economic operators and official representatives in the territory, during the last financial year.
q12303	<b>State which territorial activities the project participated in during the last financial year</b>	<p>Select one or more options from the suggested list of activities in the territory in which you took part during the last financial year.</p> <ul style="list-style-type: none"> <li>● Town's annual festival</li> <li>● Campaigns and protests</li> <li>● Popular culture events</li> <li>● Others (please specify)</li> </ul>
q12401	<b>What means do you have for detecting the needs, requests and concerns of the territory? List the means using the "Others" option and the qualitative field.</b>	<p>Select one or more options from the suggested list referring to the means that you use to sound out needs, requests and concerns in your territory. If you use other means than those suggested in the list, fill in the writing field, marking the Others option. The options are as follows:</p> <ul style="list-style-type: none"> <li>● Community analysis</li> <li>● Interviews</li> <li>● Surveys</li> <li>● Physical letterbox</li> <li>● Virtual letterbox</li> </ul>

		<ul style="list-style-type: none"> <li>● Working groups</li> <li>● Communication campaigns</li> <li>● Meeting points</li> <li>● Discussions and debates</li> <li>● People responsible for active listening</li> <li>● Others (please specify)</li> </ul>
q12402	<b>State the age groups of the users of the various activities.</b>	<p>Select one or more options from the suggested age group list of users of the various activities you have undertaken.</p> <ul style="list-style-type: none"> <li>● From 0 to 12</li> <li>● From 12 to 20</li> <li>● From 20 to 35</li> <li>● From 35 to 50</li> <li>● From 50 to 65</li> <li>● Over the age of 65</li> </ul>

The two final qualitative questions are as follows:

Code	Wording of the question	Explanation of what information must be reported
q12001	<b>Describe the interaction between the project and the territory/sector.</b>	Explain the interaction between your project and the territory or activity sector in which it is undertaken.
q12002	<b>What were the most notable milestones in terms of forging ties with the territory/sector during the last financial year?</b>	Explain the most outstanding milestones in terms of your project forging ties with the territory or sector.

### 3. SOCIAL IMPACT AND RETURN

The social impact and return indicators aim to measure the social base of the project, as well as the fostering of community and association network dynamics, the behaviour and the economic activities carried out using community economy criteria. This block begins with a series of questions that are mostly of a **quantitative** nature, although there may be some of a **qualitative** nature.

Code	Wording of the question	Explanation of what information must be reported
q0101	<b>Number of members (not</b>	State the number of NON-SALARIED members and/or collaborators in the project, broken down by gender.

	<b>including workers who are members)</b>	
q0102	<b>Number of member organisations ---&gt;NOT PERSONS</b>	State the number of organisations or associations that are members of the project.
q0103	<b>People who take part representing member organisations</b>	Indicate the number of people representing member organisations who take an active part in the decision making and executive areas of the project, broken down by gender. It is important to have this figure to know the number of people actively taking part in the organisation, so that the indicators that require this number may be calculated.
q0109	<b>Number of workers on the workforce</b>	State the number of workers on the workforce (contract of employment) that are connected to the project, broken down by gender.
q0110	<b>Number of workers who are not members of the workforce</b>	State the number of workers who DO NOT have a contract of employment that are connected to the project, broken down by gender. For example, workers who put in an invoice or bill every month or quarter.
q0107	<b>Number of voluntary workers</b>	State the number of people who take part in the structure of the project as voluntary workers (*see glossary), broken down by gender.
q0111	<b>Number of users</b>	State the total number of people taking part in the project as users (*see glossary), broken down by gender.
q1101	<b>Total number of jobs expressed in complete working days during the last financial year</b>	The equivalent of complete working days must be reported for all the people who had a contract of employment and were connected to the project during the year, and then the total is calculated. Cooperative-member workers and self-employed workers are also counted, even though they do not have a contract of employment. People who are active in work and training programmes are not included. For individuals, i.e. self-employed individuals working exclusively for the organisation (regardless of the number of hours worked) are counted as a complete working day. Example calculation: If someone has worked 50% of the working day for 12 months, the equivalent in complete working days would be: 1 person * 12/12 (months worked / 12 months of the year) * 50/100 (% of the working day/100) = 0.5 (50% of a complete working day, all year).
q1103	<b>Total number of hours dedicated to the project by volunteers</b>	State the total number of hours that volunteers dedicated to the project.
q1104	<b>Do your decision-making areas respond to the diversity/ reality of</b>	Indicate the diversity of the people using the activities developed by the project, e.g. the LGBTIQ community, racialised people, people with reduced mobility, mental illnesses, etc.

	<b>your territory?</b>	
q1105	<b>Do you have empowerment mechanisms that contribute to developing the continual involvement of the project's social base?</b>	Indicate in which way they contribute to the empowerment of the project's social base (evolution of the people taking part in the project from the initial stages from local residents to the manager, and including user, volunteer and activist stages).
q1106	<b>Give a brief description of the existing mechanisms, their implementation and follow-up</b>	If you have empowerment mechanisms such as those indicated in the previous question, describe them, and give a brief description of actions related to the implementation and follow-up of the mechanisms you use.
q13201	<b>Indicate the type of activities carried out</b>	Select one or more options from the list of activities carried out in the project: <ul style="list-style-type: none"> <li>● Creation of cultural networks</li> <li>● Events</li> <li>● Campaigns</li> <li>● Manifestos</li> <li>● Community social mobilisation actions</li> <li>● Support for organisations and projects</li> <li>● Others (please specify)</li> </ul>
q13202	<b>Name the new groups and/or organisations created or promoted by the project</b>	Indicate the complete names of the new groups and/or organisations created or promoted by the project This indicator aims to identify the initiatives that have been developed with the project's explicit support, be it through providing venues, facilitating resources or other activities, with or without direct financial compensation.
q13203	<b>Number of new groups and/or organisations created or promoted by the project</b>	State the total number of the new groups and/or organisations created or promoted by the project. This indicator aims to identify the initiatives that have been developed with the project's explicit support, be it through providing venues, facilitating resources or other activities, with or without direct financial compensation.
q13401	<b>Indicate which of the following aspects are included in decision making for purchases:</b>	Select one or more options from the list of aspects comprising the decision-making process for purchasing all kinds of goods and services (*see glossary): <ul style="list-style-type: none"> <li>● Proximity</li> <li>● Social and solidarity economy</li> <li>● Fair trade</li> <li>● Responsible consumption</li> <li>● Others (please specify)</li> </ul>
q1301	<b>Number of suppliers to the organisation / project</b>	Indicate the total number of suppliers used by the project.

q13402	<b>Total number of suppliers who meet the criteria indicated above</b>	Indicate the total number of suppliers who meet the criteria indicated above (proximity, SSE, Fair Trade and responsible consumption).
q5601	<b>Total annual amount of goods and services acquired from suppliers in your locality.</b>	Indicate the total annual amount -in €- of the goods and services acquired from suppliers in the same locality as the project. This information can be obtained by asking the person responsible for managing this area.
q13403	<b>Indicate what type of economic activities under Social and solidarity economy criteria are indirectly promoted and reinforced.</b>	Explain the productive activities that meet social and solidarity economy criteria (including community economies - see glossary), which are indirectly promoted and reinforced as part of the project. For example, a cooperative or a consumer group is created, which does not originate from the direct activity of the project but is generated by the dynamics or synergies created around the project and its activities.
q13302	<b>Total amount of investments made in infrastructure and assets - in €</b>	Indicate the total amount of investments (not expenditure) made in infrastructure and assets - in € - during the present financial year. For example, assets would include computers, projectors, sound equipment, furniture, tools (carpentry or gardening), etc. This information can be obtained by asking the person responsible for managing this area.
q13301	<b>Indicate the type of activities carried out</b>	Select one or more options from the list of community activities that are carried out as part of the project (*see glossary): <ul style="list-style-type: none"> <li>● Time banks</li> <li>● Exchange networks</li> <li>● Meeting points</li> <li>● Community resources banks</li> <li>● Conserving collective memory</li> <li>● Nursery schools</li> <li>● Consumer cooperatives</li> <li>● Others (please specify)</li> </ul>

There are also two **qualitative** questions;

<b>Code</b>	<b>Wording of the question</b>	<b>Explanation of what information must be reported</b>
q13001	<b>What is the social and community interest and commitment of your project?</b>	Explain your project's interest and commitment in terms of the ongoing relationship it has with the community it interacts with, and the project's social commitment (*see glossary).
q13002	<b>What were the project's most notable actions in</b>	Explain the most outstanding actions of the year in terms of social and community

	<b>terms of social and community commitment during the last financial year?</b>	commitment.
--	---	-------------

#### 4. INTERNAL DEMOCRACY AND PARTICIPATION

The indicators referring to the area of democracy and participation aim to measure some basic variables, such as internal democracy and participation in decision making specifically concerning the project. The range of questions are mostly **quantitative**, with a few **qualitative** ones:

Code	Wording of the question	Explanation of what information must be reported
q14101	<b>State the type of participative bodies or forums used by the project for decision making and management</b>	Select one or more options from the list of participative bodies or forums for decision making and project management: <ul style="list-style-type: none"> <li>● Assemblies</li> <li>● Training Committee</li> <li>● Programming Committee</li> <li>● Health Committee</li> <li>● Environmental Committee</li> <li>● Gender or Feminist Committee</li> <li>● Participation Committee</li> <li>● Management</li> <li>● Others (please specify)</li> </ul>
q14102	<b>State how often assemblies are held</b>	Select one of the options from the list relating to how often assemblies are held: <ul style="list-style-type: none"> <li>● Monthly</li> <li>● Quarterly</li> <li>● Annually</li> <li>● Others (please specify)</li> </ul>
q2103	<b>Number of people taking part in the assemblies</b>	State, in whole numbers and broken down by gender, the number of people that took part in the project's assemblies during the year. The number of different people that took part in at least one session must be indicated.
q14103	<b>State the type of committees pertaining to the project</b>	Select one or more options from the list relating to the type of committees or working groups linked to the project. <ul style="list-style-type: none"> <li>● Consultative</li> <li>● Executive</li> <li>● Decision-making</li> </ul>
q14104	<b>Indicate how often the stable committees (or the project's other participative decision-making and management bodies and forums) are held</b>	Select one or more options from the list relating to the average frequency with which the project's participative bodies or forums for project management and decision making are held: <ul style="list-style-type: none"> <li>● Fortnightly/weekly</li> <li>● Monthly</li> <li>● Quarterly</li> <li>● Annually</li> <li>● Others (please specify)</li> </ul>

q14105	<b>Total number of people that took part in the committees or any other project decision-making forum during the last financial year</b>	Indicate, in whole numbers and broken down by gender, the number of people that took part in any project governance forum (*see glossary) during the last financial year, other than assemblies. The number of different people that took part in at least one session must be indicated.
q14106	<b>Do you have a formal procedure for rotating the people who form part of the decision-making and management bodies?</b>	Indicate whether you have a formal procedure for rotating the people who form part of the decision-making and management bodies (including representation with the public administration).
q14107	<b>Indicate the maximum length of service of the people forming part of the bodies dedicated to decision making, contact, representation with public administrations and leadership roles.</b>	Indicate, in whole numbers, the maximum length of service of the people forming part of the bodies dedicated to decision making, contact, representation with public administrations (political representatives) and leadership roles.
q14201	<b>Is the existing intersectional diversity in your territory reflected in your decision-making forums?</b>	Indicate whether diverse persons have a presence in your decision-making forums in a similar proportion or presence to the intersectional diversity in the neighbourhood, district, or sector. Intersectional is understood as being diversity crossed by various factors of discrimination, origin, age, administrative situation, racialisation, gender, sexual identity, sexual orientation, etc.
q14202	<b>Indicate the actions carried out to promote diversity within the decision-making areas</b>	Briefly explain the actions taken to promote diversity within the project's decision-making areas.
q14203	<b>Number of volunteers from systematically discriminated groups</b>	Indicate the total number of volunteers who, because of their cultural, physical characteristics, etc., are classified as a group considered to be inferior and a minority, and are discriminated against for that reason, broken down by gender.
q14204	<b>Number of users from systematically discriminated groups</b>	Indicate the total number of users who, because of their cultural and physical characteristics, etc., are classified as a group considered to be inferior and a minority, and are discriminated against for that reason, broken down by gender.
q14301	<b>Number of activities carried out on the initiative of users</b>	Indicate, in whole numbers, the total number of activities that have been carried out following the initiative of project users.
q14401	<b>Indicate the type of public information available on the project</b>	Select one or more options from the list relating to the information you make public through electronic channels: <ul style="list-style-type: none"> <li>• Economic and financial information</li> </ul>



		<ul style="list-style-type: none"> <li>• Communication plan</li> <li>• Strategic plan</li> <li>• Internal regulations and procedures</li> <li>• Ethical code and articles of association</li> <li>• Others (please specify)</li> </ul>
q14402	<b>State the link (URL) where it is possible to consult the available public information you selected</b>	Detail the links referring to the electronic channels where it is possible to consult the information indicated in the previous point (known agenda, transfer of information, etc.).
q14501	<b>Description of existing mechanisms for promoting the participation of the social base involved in the project</b>	Give a brief description of the available mechanisms for promoting the participation of the social base involved in the project.
q14502	<b>Indicate how access to the information needed to take part in decision-making processes is guaranteed for all the project's social base and interest groups.</b>	Describe the mechanisms, tools and dynamics that are implemented to ensure that the people forming part of the project's interest groups are able to access the minimum information needed to be able to take part and be involved in the project's decision-making processes.
q14601	<b>Indicate the project's level of openness and accessibility</b>	<p>Select one or more options from the list relating to the type of openness and accessibility associated with the project:</p> <ul style="list-style-type: none"> <li>• Openness to the public guaranteed with periodicity and transparency</li> <li>• Reserved timetables and forums for the territory's organisations, groups and services</li> <li>• Provision of venues and materials</li> <li>• Venues for organisations, free, open activities (or with an affordable prices policy)</li> <li>• Others (please specify)</li> </ul>

The **qualitative** questions are:

<b>Code</b>	<b>Wording of the question</b>	<b>Explanation of what information must be reported</b>
q14001	<b>What is your commitment concerning internal democracy and what are the most notable actions you implemented during the last financial year?</b>	Briefly explain your project's commitment in the area of internal democracy and the most outstanding actions you implemented during the last financial year.
q14002	<b>What are the ways in which you promoted accessibility,</b>	Indicate how you promoted accessibility, universality and participation in the project, including all the actions and mechanisms aimed at internal democracy and decentralised decision making.

	<b>universality and participation during the last financial year?</b>	
--	---	--

### 5. CARE FOR PEOPLE, PROCESSES AND THE ENVIRONMENT

The indicators in this block aim to measure the care the project shows for the people involved in its development, the processes carried out and the environment in which they are implemented.

This block of mostly **quantitative** questions is as follows:

<b>Code</b>	<b>Wording of the question</b>	<b>Explanation of what information must be reported</b>
q15101	<b>Indicate the existing mechanisms for fostering collective sustainability</b>	Select one or more options from the list relating to the existing mechanisms for fostering the project's collective sustainability. <ul style="list-style-type: none"> <li>● Flexible timetables</li> <li>● Improved salaries</li> <li>● Training</li> <li>● Care areas</li> <li>● Areas for collective negotiation</li> <li>● Sexual aggression protocols</li> <li>● Sharing of domestic tasks</li> <li>● Conflict mediation</li> <li>● Internal cohesion areas</li> <li>● Leisure areas</li> <li>● Reception plan</li> <li>● Others (please specify)</li> </ul>
q15103	<b>Is there a formal commitment linked to the contribution of the values of community life, social inclusion and equality among people?</b>	Indicate whether there is a formal commitment regarding the values of community life, social inclusion and equality among people within the project (do you have a protocol or a committee, an internal governance document, a manifesto, or other?)
q15201	<b>Do you have procedures for managing and promoting diversity?</b>	State whether your project has procedures aimed at managing and promoting diversity among systematically discriminated groups.
q15202	<b>Do you have procedures and practices to ensure accessibility for people with functional diversity?</b>	Indicate whether there are procedures and practices to ensure accessibility for people with functional diversity in the project.

q15301	<b>Indicate the existing mechanisms for fostering organisational sustainability</b>	<p>Select one or more options from the list relating to the existing mechanisms for fostering the project's organisational sustainability.</p> <ul style="list-style-type: none"> <li>● Strategic plan</li> <li>● Communication plan</li> <li>● Continuous evaluation</li> <li>● Plan for relations with interest groups</li> <li>● Others (please specify)</li> </ul>
q15401	<b>Indicate the existing formal practices regarding the management of environmental impacts</b>	<p>Select one or more options from the list relating to the project's existing formal practices and procedures regarding the management of environmental aspects and impacts.</p> <ul style="list-style-type: none"> <li>● Greening of events</li> <li>● Energy savings and energy efficiency</li> <li>● Water savings and water efficiency</li> <li>● Waste prevention</li> <li>● Waste management</li> <li>● Circular economy</li> <li>● Resources Bank</li> <li>● Vegetable gardens</li> <li>● Green roofs</li> <li>● Others (please specify)</li> </ul>
q15501	<b>State and give a brief description of the productive economic activities undertaken directly under social and solidarity economy criteria</b>	<p>Give a brief description of the productive economic activities undertaken directly with social and solidarity economy criteria (including community economies - see glossary). For example, creating a cooperative, a carpentry workshop, a catering service, a resources bank, or other, as part of the project (in the activities plan)</p>
q1201	<b>Total annual expenditure - in €</b>	<p>Indicate the organisation's expenditure in euros for the last financial year. This field should include the total expenditure related to the project in the financial year.</p>
q1202	<b>Total amount spent on acquiring goods and services - in €</b>	<p>Indicate the amount, in euros, paid to the project's various suppliers for the acquisition of goods and services. By the acquisition of goods and services we understand the group of purchases made for buying goods (office materials, industrial supplies, computer equipment, etc.) and the money spent on contracting services (utilities, communication services, IT services, etc.). This amount must be lower than the amount stated in the previous section concerning total annual expenditure. NB: organisations that do not have formal accounting are recommended to make an estimate.</p>
q1206	<b>Total annual expenditure on staff - in €</b>	<p>The annual cost of staff is calculated by adding up the accounts 640 (Wages and Salaries) and 642 (company Social Security contributions). This must also include the invoices issued by people working for the project who receive their remunerations in advance or who invoice as self-employed workers.</p>

q1203	<b>Total annual revenue - in €</b>	Indicate the project's total revenue in euros for the last financial year. This revenue may come from the sale of goods or services, or from subsidies, donations, membership fees, etc. The sum of all these is the amount that must be entered in this box.
q1204	<b>Total annual amount from the sale of goods and services - in €</b>	This refers to revenue generated by the project's own activities (entrance tickets for activities, charges, prices, enrolment and registration fees, etc.), i.e. for sales or provision of services (in the General Accountancy Plan this basically concerns the entries associated with Account 70). Revenue generated by the formal provision of services to public administrations must also be included. NB: organisations that do not have formal accounting are recommended to make an estimate.
q1205	<b>Total amount of subsidies awarded to the organisation/project - in €</b>	This refers to the sum of the amounts that appear in the Profit and Loss account in the 740 accounts. This does not include revenue generated from the provision of services to public administrations where there is a corresponding invoice. It will include all the subsidies awarded and attributed to the financial year under evaluation, irrespective of whether they have been paid or not during the current financial year.
q1209	<b>Total amount received from private fund resources - in €</b>	This refers to the total amount of contributions received by the project from private funds in the form of donations or without any direct economic compensation (this does not include formal loans).
q1210	<b>Total amount of the organisation's financial resources allocated to the project (the project's own resources) - in €</b>	This refers to the total amount of contributions made to the project by organisations linked to its coordination and management. This does not include public subsidies or private resources from organisations outside the project.

The final **qualitative** questions are as follows:

<b>Code</b>	<b>Wording of the question</b>	<b>Explanation of what information must be reported</b>
q15001	<b>What is your commitment concerning the care of people, processes and the environment?</b>	Explain your project's commitment in the area of care for people, processes and the environment, and the most outstanding actions taken during the last financial year.
q15002	<b>What are the project's most notable actions in terms of caring for people, processes</b>	Briefly explain the project's most notable actions in terms of caring for people, processes and the environment during the last financial year.

	<b>and the environment during the last financial year?</b>	
--	--	--

## QUESTIONNAIRES TO BE ANSWERED BY INTEREST GROUPS

There are two types of questionnaires automatically sent to various interest groups so that they can carry out an internal and external assessment of the project. The answers from the various people or organisations are compiled anonymously by the IT application, and the aggregated average results are shown in the project's final report. The questions featured in the two external evaluation questionnaires are shown in the following pages.

### EXTERNAL QUESTIONNAIRE FOR PEOPLE/ORGANISATIONS FROM THE LOCAL COMMUNITY

The external questionnaire enables local community organisations to express their perception of the impact of the project on the territory where it is based.

Thematic block	Wording of the question
<b>Forging ties with the territory</b>	The project's level of connection with the neighbourhood or district's association, productive, commercial and official fabric
	How open the project is to proposals from neighbourhood / sectoral organisations
	How well the project is aligned with the needs of the neighbourhood, district or area.
<b>Social impact and return</b>	Level of involvement of the project in the territory's campaigns, organisation platforms and/or community venues
	The project facilitates the participation and involvement of the territory's local people.
	The project facilitates empowerment processes for local residents
	The degree of the project's support for, or participation in, the territory's community economy initiatives (time bank / exchange networks / Venues for gatherings/ Conserving the collective memory / nursery schools / consumer cooperatives)
<b>Internal democracy and participation</b>	The effect the opinion of the territory's organisations has on the decisions that are finally taken
	The opportunities the organisations have to take part in the definition and direction of the project.
	To what degree the diversity present in the surrounding area is reflected in the project's decision-making structure.
	To what degree the diversity present in the area is reflected in the project participants as a whole (users, volunteers, workers, etc.).
	Transparency regarding organisational structure, decision making and the financial situation.
	Level of openness and accessibility in terms of participating in the project.
<b>Care for people, processes and the</b>	Ways of resolving conflicts in the territory and quality of leadership

<b>environment</b>	Facility for understanding how the project works and how to take part
	Relational climate (general atmosphere, relationships with colleagues, etc.)
	Level of project coherence regarding environmental sustainability
	Level of project coherence regarding feminism / principles of equality
	Level of project coherence regarding principles of internal democracy
	Rate the degree of social impact you think the project has

**EXTERNAL QUESTIONNAIRE FOR PEOPLE LINKED TO THE PROJECT (volunteers, activists, and users)**

In a similar way, the external questionnaire for people linked to the project (such as volunteers, activists, and users) aims to evaluate the same social impact aspects as in the cases of organisations or people in the community but adjusted to the distinctive features of the people involved in the project.

<b>Thematic block</b>	<b>Wording of the question</b>
<b>Forging ties with the territory</b>	The project's level of connection with the neighbourhood or district's association, productive, commercial and official fabric
	How open the project is to proposals from local residents, users and/or volunteers
	How well the project is aligned with the needs of the neighbourhood, district or area.
<b>Social impact and return</b>	Level of learning and personal growth you get from your connection to the project
	Taking part in the project has made you become more involved in the dynamics of the neighbourhood / district / sector
	Taking part in the project has given you the chance to discover and get involved in other things ("in other movements" / in other community activities and processes)
<b>Internal democracy and participation</b>	To what degree your opinion affects the decisions that are finally taken
	The opportunities you have to take part in the general progress of the project
	To what extent the programmes and support tools offered by the project are suitable (training, resources).
	To what extent the diversity present in the surrounding area is reflected in the project's decision-making structure.
	To what degree the diversity in the area is reflected in the project participants as a whole (users, volunteers, workers, etc.).
	Level of transparency regarding organisational structure, decision making and the financial situation.
	Quality of reception and support protocols for the project's volunteers.

<p><b>Care for people, processes and the environment</b></p>	Ways of resolving conflicts in the project and quality of leadership
	How easy it is to understand how the project works and how to take part in it
	Relational climate (general atmosphere, relationships with colleagues, etc.)
	Level of project coherence regarding environmental sustainability
	Level of project coherence regarding feminism / principles of equality
	Level of project coherence regarding principles of internal democracy
	Rate the satisfaction you get from participating in this project



## GLOSSARY

**Social economy<sup>1</sup>:** “The social economy is a movement made up of a group of organisations committed to a set of legal structures, specifically: cooperatives of all kinds; social initiative associations, foundations and cooperatives as non-profit legal structures (what is known as the third sector); friendly societies. These legal structures guarantee that profit is limited (in the case of cooperatives) or does not exist at all (third sector and friendly societies). Generally, the former are characterised by democratic internal management and the latter by the positive social impact their activity has (e.g. caring for disadvantaged groups).” (p. 62)

**Social and solidarity economy<sup>2</sup>:** “This is a movement consisting of a set of economic practices defined by the following characteristics: they must be geared towards satisfying the needs of their members or of society, always prioritising this goal over making a profit, which has to be limited or non-existent; they must be experiences based on democratic management, understood as the participation of the people involved in the projects; they must develop their activities from the perspective of social and environmental commitment, thereby minimising negative impacts and aiming at social change. This definition is not limited to certain legal structures, but rather includes any experience of satisfying needs based on these principles, from formal companies to public administration practices, and including informal economies and individual practices concerning responsible consumerism and saving. (p. 69)

**Commons-based economy<sup>3</sup>:** “Counterpoint to the state-market duality as the only visible, legitimate spaces for the production, management and allocation of the resources of the economic system. The key ideas are these: in addition to being a historic vision of how to manage communal resources, Commons relies on social processes and practices, i.e. it refers to goods and commons, but also to management styles based on commons. As social practices, they are based on three interdependent cornerstones: the community that produces or manages the resource; the produced or managed resource and the governance regulations established by the community relating to the specifics of the resource. All in all, the ownership of the resource or practice is not considered as public or private, but as belonging to the community associated with it. In this case, historically, practice has always been ahead of the theory, as systems based on community management date back to prior to the Industrial Revolution” (p. 49)

---

<sup>1</sup> Source: Suriñach Padilla, R. (2017): Barcelona's transformational economies\* Publisher: Barcelona City Council/ICG Marge, SL, Barcelona

<sup>2</sup> Source: Suriñach Padilla, R. (2017): Barcelona's transformational economies\* Publisher: Barcelona City Council/ICG Marge, SL, Barcelona

<sup>3</sup> Source: Suriñach Padilla, R. (2017): Barcelona's transformational economies\* Publisher: Barcelona City Council/ICG Marge, SL, Barcelona

**Community behaviour**<sup>4</sup>: “Social practices which, when undertaken by active citizen communities, try to design collective action connections for resolving shared needs, and do not generally pass through commercialisation or monetary exchange processes or the regulations derived from public bureaucracy.” (p. 2)

**Voluntary workers, activists (and users)**<sup>5</sup>: “The ‘communal’ subject must be recognised as a real political and social stakeholder with a capacity for action and influence that goes beyond the actions of government.” (p. 25)

**Governance / Community decision making**<sup>6</sup>: “Community management, as envisioned by the Citizen Management Platform, is based on the communal definition of the subject of that management. “The projects respond to an agreed collective interest linked to the needs of a territory and its people, its permeability and the community's access to the democratic control of decision-making bodies and the resources that are being managed, regardless of whether they are granted by the administration or recuperated through disobedience” (p. 56).

**Project (THE Project)**<sup>7</sup>: “proposals raised by the community as a result of collective requests, responding to “agreed collective interest and linked to the needs of a territory and its people”. The fact that a project is communal, i.e. created and defined by the general public, does not mean that the management must be autonomous or communal. A situation may arise where the administration takes on the management of a community project or transfers it to a third party (through political will or the incapacity of the community that raised the proposal). In the case of civil management, it may be that there is a convergence between the service that the city council opens up to indirect management and a community project (cases such as the Ateneu Popular 9 Barris, Casa Orlandai or Casal Pou de la Figuera) (p. 43)

**Activities**: we understand that each project is made up of different lines of action and work areas, which in turn consist of various activities. The project-level questionnaires ask about this level of activity, which is included in its campaigns and specific actions. This would be between the line of action and the action.

**Forging ties with territory / Activities in the territory**: Territory is understood as the physical delimitation and the local resident, association and institutional fabric that defines a community. This implies the existence of relationships of representativity, proximity and collaboration, and we are therefore normally talking about a neighbourhood or small municipality. In the case of services or sectoral projects, these ties also have to involve the sector, which expands the geographical framework.

---

<sup>4</sup> <https://www.slideshare.net/lahidra/patrimoni-ciudad-resum-executiu>

<sup>5</sup>

[http://ajuntament.barcelona.cat/participaciociudadana/sites/default/files/documents/patrimoni\\_ciudad\\_a\\_marc\\_conceptual\\_v.3.0.pdf](http://ajuntament.barcelona.cat/participaciociudadana/sites/default/files/documents/patrimoni_ciudad_a_marc_conceptual_v.3.0.pdf)

<sup>6</sup> Idem (p. 39)

<sup>7</sup> Idem. (p. 43)

**Users, voluntary workers and activists:** People are users when they benefit from a product or service and, at most, make their opinion about it known. Voluntary workers are people, whether they are users or not, who take part in the development of that service without receiving economic compensation; they only carry out a task they are given or occasionally take decisions. An activist is continually involved in the design and provision of the service. The degree of involvement and participation increases.

**Social transformation:** This is the overall modification of a community's social structure, operation or culture, where the community participates in and leads these improvement processes, with the aim of benefiting everyone and the environment in a sustainable way.

**Institutional stakeholder:** A public or semi-public body that undertakes an official role or a public service, of an administrative, health, educational type, etc.

**Groups formed by origin or cultural contexts:** Communities are not homogeneous and must take care to be inclusive and bring together the various groups of people that comprise it: a diversity that can consist of various aspects, such as origin and culture.