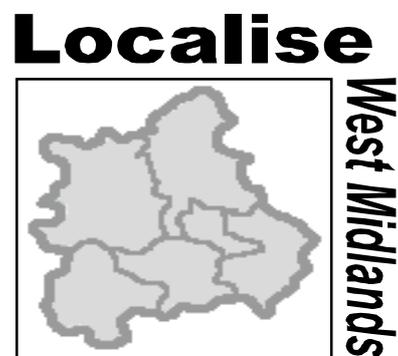


# **Localise West Midlands**

## **Annual Report**

**July 2007- March 2008**



*Local economic solutions for sustainability*

**Localise West Midlands**  
**The Warehouse, 54-57 Allison Street**  
**Digbeth, Birmingham, B5 5TH**  
**Tel: 0121 685 1155**  
**Fax: 0121 643 3122**  
**Email: [info@localisewestmidlands.org.uk](mailto:info@localisewestmidlands.org.uk)**  
**Web: [www.localisewestmidlands.org.uk](http://www.localisewestmidlands.org.uk)**



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## **Introduction**

This is the annual report of Localise West Midlands, a regional not-for-profit think-tank, campaign group and consultancy which aims to promote the social, environmental and economic benefits of local trade, money flows and decision making. We work by researching, supporting and encouraging examples demonstrating the benefits of local sourcing and local money flows and the replication of effective localisation 'pilots' so that they can become mainstream.

This is a 9 month Annual Report due to a shift in our official year end date last year.

## **Mission Statement**

Localise West Midlands is a not-for-profit organisation which exists to promote the environmental, social and economic benefits of:

- Local trading, using local businesses, materials and supply chains
- Linking local needs to local resources
- Development of community and local capacity
- Decentralisation of appropriate democratic and economic power
- Provision of services tailored to meet local needs.

This localisation approach makes economic development and government systems more sensitive to local autonomy, culture, well-being and the responsible use of finite resources, and is growing in popularity with people and organisations all over the world.

Localisation helps build social capital, targets regeneration to meet local needs, maximises local job creation, and reduces transport and CO2 emissions.

To promote this approach across the region LWM will:

- Bring people together with a common interest in localisation
- Provide and publicise information, ideas and examples of good practice
- Facilitate or undertake demonstration projects
- Provide consultancy and other support to groups who are developing localist approaches
- Create supportive networks for localist action
- Challenge the barriers to localisation
- Link with similar projects outside the region and worldwide.

## **Background**

LWM was set up in 2002 by a group of individuals who were keen to propose solutions, as a positive response to what is currently going wrong in economics.

Our West Midlands focus is intended to make use of the region's geographical balance of urban and rural; and also to encourage democratic accountability and a people-centred approach amongst regional bodies.

Our West Midlands focus is intended to make use of the region's geographical balance of urban and rural; and also to encourage democratic accountability and a people-centred approach amongst regional bodies. We also look beyond the region, seeking to catalyse ideas across the UK and make links with organisations all over the world working on a similar agenda.

## **Activities – July 2007 to March 2008**

### **I. Strategy and organisational development**

LWM is now a not-for-profit company limited by guarantee. We have an 'asset lock' clause within our constitution but have retained the power to pay those who are Board members for non-Board work for example on our various projects. Those who came together to form LWM in the first place tend also to be those with the expertise on localisation issues in the region and this means we can build a strong partnership of associates who are committed first and foremost to the aims of the organisation.

We held an extra meeting to review of our workplan in March this year. This concluded that we had done well in developing our consultancy activities and in a way that meets our organisational objectives. We have also developed our associate base, and been successful in the delivery of our projects. In 2008-9 we want to build on the experience, profile and track record we have gained but focus more upon the following areas where we were less successful:

- bringing together what we have learned and promoting the resulting 'whole picture' of localisation to and beyond the region
- a greater degree of communication/outreach work including engaging in political dialogue
- ensuring we cover a wider geographical range in the region: less Birmingham-centric
- more developing of networks and drawing in a wider membership

Our objectives for 2008-9 are as follows:

1. Promote the whole picture of localisation across and beyond the region
2. Develop expertise, evidence and influence on specific localisation issues
3. Engage with regional/local policy to bring a localisation perspective
4. Develop the organisation to increase our capacity and efficiency to deliver the above.

Karen Leach remains the Coordinator of LWM and there have been some changes in other staff and associates which are detailed in the People section of the report.

### **2. Projects and consultancy work**

#### **Sustainable Procurement in Birmingham – implementing the action plan**

Following the recommendations made in the previous year to *Be Birmingham*, LWM was engaged again by the strategic partnership with a project aiming to help partner organisations deliver Community Strategy and Local Area Agreement objectives through procurement and carbon footprinting. Rosemary Foggitt and Jon Morris led this project. More specifically the project objectives were to:

- Develop a *Be Birmingham* Sustainable Procurement compact aligned with the Sustainable Community Strategy, including commitments to minimise carbon emissions and promote equal opportunities from all suppliers
- Develop, adapt or signpost to appropriate carbon footprinting tools for procurement
- Development of the sustainable procurement champion role amongst partners and agreement of approach to implementation
- Facilitate ongoing networking.

The compact was launched on 12th March 2008 by the chair of *Be Birmingham*, Cllr Paul Tilsley. It commits the partners to relevant staff training, development of policies for individual organisations, and identification of priorities for sustainable procurement. It includes some commitment to the concept of 'whole life costing' (considering the costs of operating and disposal of a purchase), and using procurement to achieve wider organisational objectives.

## **Prosperity and Inflation agenda**

Andrew Lydon has been leading twin projects on the prosperity and inflation agenda funded by the Andrew Wainwright Reform Trust.

The first of these is to build a campaign around the adoption of more diverse inflation targets that address regional and demographic variances, from research conducted by Andrew the previous year. There has been interest from members of all main political parties and the project continues into the current year.

The second emerged from the same initial work and looks at the feasibility of a reformed independent Bank of England – or Bank of Britain - potentially with regional representation to ensure monetary policy can be more broadly beneficial.

The presentations developed last year introducing our prosperity and inflation framework are still available to any interested groups or individuals.

## **Farming & Food Team wholesaler and producer group mapping**

In February and March 2008 LWM conducted some further wholesaler mapping to complete a comprehensive study of the region begun the previous year. This was commissioned by the Government Office's and Advantage West Midlands' Farming and Food Team. This study aimed to identify wholesalers in the region who are capable of and interested in supplying the region's public sector with locally sourced fruit and vegetables.

This year's study was of Staffordshire, Herefordshire, Worcestershire and Warwickshire, as the conurbation and Shropshire were covered last year.

The study fits into a wider initiative of the Food and Farming Team, which aims to create and develop linkages between local food growers, wholesalers and public sector purchasing bodies: a parallel piece of work by Heart of England Fine Foods is collating information on public sector fresh food contracts in the region. Additionally, LWM are considering a feasibility study for the use of Birmingham's wholesale markets as a hub for distribution of local food to the city's public procurers.

## **Digbeth Community Land Trust**

LWM and partner organisations are proposing a Community Land Trust on the land neighbouring The Warehouse in Digbeth: a small, cooperatively owned sustainable development comprising affordable housing, workspace and garden.

In a Community Land Trust, the asset (the land) is owned by a charitable trust and 'locked' for charitable (social and environmental) benefit, but the Trust will involve a co-operative model including residential/business tenants and the involved organisations in its membership.

An indicative design has been drafted for the site and first steps have been taken to seek support within Birmingham City Council to sell us the land at a price that reflects the public benefits the scheme will bring. Next steps are to seek local interest in business or residential units and to make progress on securing the land.

Proposals for funding for a development officer will be put forward this summer to the Esmee Fairbairn Foundation. The development worker would be responsible for the set-up of the CLT and for coordinating the development work for the scheme.

The project has been approved as one of 11 CLT 'pioneers' in a pilot scheme being run by Community Finance Solutions and the Housing Corporation, which gives us access to advice and support from specialists on community land trust models.

The partners for this project are Localise West Midlands, Accord Housing Association, Birmingham Friends of the Earth, and Birmingham Cooperative Housing Services.

## **Fair Deal for UK Farmers**

During the year Localise West Midlands has been supporting the 'Fair Deal Awards,' an award created by the Attwood Group to raise awareness of both 'fair deals' and 'unfair deals' that farmers in UK experience in the market place today.

The Fair Deal Awards are nominated by producers and given to retailers that they feel offer them a 'fair price'. Localise West Midlands coordinates the Award presentations and surrounding publicity.

The principle of a fair share of the consumer price being paid to producers is applicable across the world. The severity of the impacts will differ greatly but the experiences of larger corporations taking increasing shares of producer's profits or global competition and trade pushing down prices are shared across the world, particularly by the smaller farms.

Two awards have been presented, and another two are being prepared for this summer. Supermarket chain Waitrose were the first of four organisations to be given an Award; they were nominated by dairy farmer Andrew Hemmings for paying a fairer price for his milk than the other chains would offer. They were willing to pay extra for quality, animal welfare and environmental standards offering him the opportunity to properly care for his stock and landscape.

A second award was presented by Fordhall Farm to the general public, the people who buy directly from their farm shop or buy their produce at farmers markets, because in the words of tenant farmer Charlotte Hollins "without them we could not survive against the power of the big retailers and corporations that increasingly dominate the global food market".

In the coming year LWM is also looking into the possibilities of extending its role to that of a 'signposting' organisation for domestic producer focused fair trade initiatives, investigating whether a more collaborative approach between these initiatives might be more effective, and producing a webpage that brings together all initiatives on this issue.

## **Birmingham Climate Change Strategy**

Former Eastside sustainability advisor Rosemary Coyne, briefly on our associates list before her move to Advantage West Midlands at Easter, assisted *Be Birmingham* with the

mammoth task of putting together the BSP's Climate Change Strategy. Her specific task is coordinating a series of leadership workshops for senior BSP partner organisation staff who will be asked to identify and agree sets of strategic priorities, actions and targets for each of the nine themes of the strategy, in order to achieve something that is cohesive, deliverable and agreed with all partners. The themes include amongst others procurement, business, planning, transport, skills and homes. The workshops culminated in a January conference for partners to examine the outcomes of the different theme groups in the light of the strategy as a whole, adopted by the Partnership at Easter.

### **Sustainable Constituencies**

Rosemary Coyne also carried out a small piece of work for *Be Birmingham* on sustainability in Birmingham 'Constituencies' (devolved council services across the city).

This involved a survey of staff attitudes, by online and face-to-face interviews, in three pilot Constituencies (Ladywood, Edgbaston and Hall Green) to assess behaviours, attitudes and awareness towards sustainability issues. This was used to define a baseline; and to inform the content of a guidance document for constituency staff which raises awareness and provides advice on sustainability throughout constituency activities.

The main recommendations were:

- Constituency Climate Change Champions to be supported (time in their workplans and training) to be more active on sustainability issues.
- Greater attention to simple quick-wins such as double sided/reused paper printing, turning off lights and electrical equipment etc.
- Increase constituency staff awareness of sustainable procurement via the compact commitments.

A leaflet was also created for constituency staff outlining the importance of sustainability and some pointers to further advice.

### **Local bonds to bring new deal for climate**

LWM founder member Colin Hines has been promoting the use of local authority bonds and pension funds over the year, particularly for financing renewable energy schemes or housing, as a secure and highly sustainable long-term form of investment. The Birmingham Post published an article by Colin in February this year on a wider concept called the Green New Deal.

When the world faced a depression in the 1930's it was Roosevelt's New Deal that contributed to getting people back to work by building the infrastructure the US required. Today a similar approach is required: one that addresses climate change by funding building efficiency, renewables and combined heat and power.

The Green New Deal will require legislation and government encouragement of the use of such funding. But the provision of such backing makes sense: it will make a significant contribution to tackling climate change and generate the jobs and economic activity that will help counter the growing effect of the global credit crunch.

Local authority bonds could be the vehicle to raise the funds for this programme. In the US there is a trillion dollar Municipal Bond market. In the UK it is almost non-existent, but this source of funding and local democracy could be promoted entirely effectively if the returns on part or all of any investment in such bonds were tax free and if a central government guarantee against loss were given on up to £100,000 of funds invested, of the type granted recently to Northern Rock investors.

LWM and Finance for the Future plan to carry out research and lobbying and to help develop pilot studies to show the feasibility of this Green New Deal approach.

### **3. Promotion, networking, policy work**

LWM members have attended regional networking events over the year including the RegenWM convention, an ESRC seminar on local economic development in an era of oil shortage and climate change. We have attended Sustainability West Midlands' meetings as a member organisation and contributed to the policy group.

Aside from our project work, LWM have given presentations for external organisations over the year, including presentations to a 'Balsall Heath Is Our Planet' event and to a group of Chinese delegates to the School of Public Policy of the University of Birmingham.

LWM continues to participate in the West Midlands Regional Sustainability Forum, the network of sustainability-focused groups working on regional policy which has seats on the Regional Assembly and other regional bodies. We coordinated the production of a joint statement from the forum on the Delivery Framework for the Regional Economic Strategy.

We have also made our own responses to the Regional Spatial Strategy, the subnational review and the Regional Economic Strategy's Delivery Framework.

#### **Eastside**

Karen Leach continued to chair the Eastside Sustainability Advisory Group, a collection of sustainability-focused interest groups with roles in advising the area's sustainability advisors and in independent scrutiny of developments in the regeneration area known as Eastside, Birmingham. However, when the Groundwork-Council partnership project Sustainable Eastside came to an end, it was felt by members that with no advisors in post the group had lived out its remit. The group therefore closed in March. The formation of a city-wide sustainable regeneration group has been discussed for the future.

### **4. Future work**

We have been given a grant by the Polden-Puckham Charitable Trust for our Extending Localisation project, which involves researching localised economic activity in the West Midlands region in order to gain a clear picture of how localisation works and could work in the region, build networks, and identify recommendations for the future to create change. This will focus on current localisation activity in the sectors of energy, food, retail, manufacturing and local finance; and will produce sets of recommendations to deliver in the mainstream what is often seen in pilots. This work has long been in our plans and we are delighted that thanks to the Polden-Puckham Charitable Trust will be carried out in the coming year.

We also intend to be working on the Digbeth community land trust; a potential role for Birmingham wholesale markets in the distribution of local produce for public procurement; regional networking meetings; procurement and sustainability training for strategic partnerships; and links with other organisations across the world working on a similar agenda. LWM has always had global objectives to its regional promotion of localisation, but given current global issues of food shortage, peak oil, climate change and impending recession it is more important than ever that all our West Midlands activities serve to reduce our footprint and support global justice as well as local community needs.

## People

### Members of LWM's Board

Over the year the following have been Board members of Localise West Midlands and active participants in the organisation:

#### **Hannah Worth (Chair)**

Hannah is a freelance consultant and formerly managed the Birmingham Community Empowerment Network, facilitating community networks that aim to involve people more effectively in local decision-making. She previously volunteered for Localise West Midlands for a few months after completing a Masters in Global Ethics.

#### **George Morran (vice chair)**

Currently Director of the West Midlands Convention, former Chair and current Secretary of the Campaign for the English Regions, research associate at Aston Business School and freelance Regional Governance consultant. Formerly, Director of the WM Regional Forum of Local Authorities, Regional Economic Consortium, assistant Chief Executive of Dudley MBC.

#### **Chris Crean (Secretary)**

Friends of the Earth's Regional Campaigns Coordinator for the West Midlands. Chris has been involved with Friends of the Earth (FOE) for over twelve years, initially as a campaigner on air pollution and transport in Birmingham and the West Midlands. He also worked for an environmental consultancy on contaminated land and industrial water issues. Chris's responsibilities include developing regional policy, a major strand of which is to develop a solutions approach - one strand of which will be a localisation of the regional economy.

#### **Michael Whithouse (Treasurer)**

Michael is a chartered accountant with a degree in rural land management, based in Shropshire. He is actively involved in various organisations including the Fordhall Community Land Trust, the Wasteless Society, the Institute of Organic Training and Advice, and the Shropshire Hills AONB advisory board. He worked on the wholesaler mapping this year.

#### **Pat Conaty**

Pat Conaty is a Research Associate of the New Economics Foundation. He has produced a number of recent policy reports on local community banking, rural regeneration and community land trusts, micro-credit for small business, and affordable housing finance for low income homeowners with disrepair problems. He was formerly the Development Director of Birmingham Settlement, an inner city voluntary organisation.

#### **Colin Hines**

Author of 'Localization- A Global Manifesto' (Earthscan) and an Associate of the International Forum on Globalisation, a San Francisco based alliance of activists, academics and economists developing alternatives to globalisation and free trade. Before that he was the Co-ordinator of Greenpeace International's Economics Unit having worked for the organisation for 10 years.

#### **Karen Leach**

Karen has been LWM's Coordinator since October 2002. Previously she worked as Campaigns and Project Worker, and Local Food and Trade campaigner, for Birmingham Friends of the Earth. In that capacity she was involved in setting up LWM. She is also a member of Birmingham Friends of the Earth Ltd's management committee, which runs the Warehouse community building where LWM are based.

**Amy Longrigg**

Amy Longrigg is a Development Worker for Woodgate Valley Urban Farm. Before moving to Birmingham last February Amy worked for the New Economics Foundation (nef), in their local economies team for two years. Key projects of the team were Plugging the Leaks and Local Alchemy which focused on developing tools for people to use to understand their local economy and get involved in decision-making. This year Amy undertook work on the BSP sustainable procurement project and fair deal for UK farmers.

**Andrew Lydon**

Andrew Lydon was initially involved in the Labour Party, where he developed his interest in decentralisation and economic development in drafting parts of their Birmingham Council manifesto. Since 1992, when he left Labour, he has been involved in the politics of the regions as a spokesman for the West Midlands New Economics Group and latterly for Birmingham NHS Concern. Andrew leads the Prosperity and Inflation campaign for LWM.

**Jon Morris**

Currently housing, planning and regeneration consultant. Former Director of Coventry New Deal for Communities, Chair of Royal Town Planning Institute Housing Panel, Extensive experience in the fields of housing, planning and regeneration, as a practitioner, researcher and lecturer. Jon has also been a member of a number of ministerial advisory groups and an expert witness to the House of Commons Environment Select Committee.

**Additional steering group members**

The following are actively involved in LWM's steering group and attend and contribute to our Board meetings.

**Barbara Panvel**

Barbara has brought together different people, organisations and ideas on localisation during her work in both Mumbai and Birmingham, and has been involved in LWM since our earliest discussions.

**Audrey Miller**

Audrey has been involved in educational work across the region. Now retired, she is an active campaigner on environmental development and asylum/refugee issues. She has served as a trustee of national and local charities, and sees localisation as an important global concept.

**Philip Davis**

Philip represents transport consumers nationally and regionally and has extensive public policy experience, consumer and community engagement. A former trade union officer who specialised in lay advocacy and tribunals, he has more recently been a local authority Leader and a voluntary sector CEO. He is now a non-executive director of a number of public and community bodies, including chair of the West Midlands Constitutional Convention.

**Staff and associates**

Karen Leach has continued as Coordinator of Localise West Midlands. Amy Longrigg was also employed occasionally throughout the year on projects. Rosemary Foggitt, Rosemary Coyne, Clare Coyne, and Bob Aston have also worked for us as associates over the year.

If you are interested in getting involved with the work of LWM, as part of the Board, an associate, or more informally, please contact [Karen Leach](#) to discuss this further.

## **Financial Report**

Localise West Midlands gratefully acknowledges financial support during 2007-8 from:

Andrew Wainwright Reform Trust – prosperity and inflation agenda  
Greening the North – Fair Deal for UK Farmers

We are also grateful for the opportunity to have worked with:

Be Birmingham  
Government Office for the West Midlands (Farming and Food Team)

**LOCALISE WEST MIDLANDS**  
(Limited by Guarantee)

**INCOME AND EXPENDITURE ACCOUNT**  
**FOR THE PERIOD 8 MAY 2007 TO 31 MARCH 2008**

	<b>Note</b>	
<b>TURNOVER</b>	1	115,002
Direct costs		<u>66,477</u>
<b>GROSS INCOME</b>		48,525
Overhead expenses		<u>19,557</u>
<b>OPERATING SURPLUS</b>		28,968
Taxation on operating surplus		—
<b>SURPLUS FOR THE PERIOD</b>	5	£ <u>28,968</u>

The notes on pages 4 & 5 form part of these financial statements.

**LOCALISE WEST MIDLANDS**  
(Limited by Guarantee)

**BALANCE SHEET**  
**AS AT 31 MARCH 2008**

	Note	
<b>CURRENT ASSETS</b>		
Debtors	3	30,980
Bank balances		<u>18,751</u>
		49,731
<b>LESS CREDITORS</b>		
Amounts falling due within one year	4	<u>20,763</u>
<b>NET ASSETS</b>		£ <u>28,968</u>
<b>CAPITAL AND RESERVES</b>		
Reserves	5	£ <u>28,968</u>

The company is entitled to exemption from the requirement to have an audit under the provisions of section 249A(1) of the Companies Act 1985 and no notice requiring an audit has been deposited under section 249B(2) of the Act. The directors acknowledge their responsibility for ensuring that the company keeps accounting records which comply with section 221 of the Companies Act 1985, and for preparing accounts which give a true and fair view of the state of affairs of the company as at 31 March 2008 and of its results for the period then ended in accordance with the requirements of section 226, and which otherwise comply with the requirements of the Act relating to the accounts so far as applicable to the company.

The financial statements have been prepared in accordance with the special provisions of Part VII of the Companies Act 1985 relating to small companies and in accordance with the Financial Reporting Standard for Smaller Entities (effective January 2007).

The financial statements were approved by the board of directors on 19 June 2008 and signed on its behalf by

MJN Whithouse  
Director

H Worth  
Director

The notes on pages 4 & 5 form part of these financial statements

**LOCALISE WEST MIDLANDS**  
(Limited by Guarantee)

**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE PERIOD 8 MAY 2007 TO 31 MARCH 2008**

**1. ACCOUNTING POLICIES**

**1.1 Basis of preparation of financial statements**

The financial statements have been prepared under the historical cost convention and in accordance with the Financial Reporting Standard for Smaller Entities (effective January 2007). A summary of the more important accounting policies, which have been applied consistently, is set out below.

**1.2 Turnover**

Turnover represents amounts receivable, net of Value Added Tax, in respect of grants, donations, fees and income from fund raising events.

**1.3 Cash Flow**

The financial statements do not include a cash flow statement because the company, as a small reporting entity, is exempt from the requirement to prepare such a statement under Financial Reporting Standard 1.

**2. DIRECTORS REMUNERATION AND RELATED PARTY TRANSACTIONS**

8 May 2007 to  
31 March 2008

Directors emoluments £ 15975

During the period the company was provided with professional consultancy services by directors or their relatives as follows:

	£
A Lydon	4,000
JS Morris	13,500
MJN Whithouse	950
R Conaty-Foggitt	21,802

At 31 March 2008, the following amounts (included above) were due to be paid:

	£
JS Morris	1,750
MJN Whithouse	950
R Conaty-Foggitt	3,740

**LOCALISE WEST MIDLANDS**  
(Limited by Guarantee)

**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE PERIOD 8 MAY 2007 TO 31 MARCH 2008 (CONT.)**

31 March 2008

**3. DEBTORS**

Trade debtors	30,641
Other debtors	<u>339</u>
	£ <u>30,980</u>

**4. CREDITORS**

Amounts falling due within one year:	
Trade creditors	6,839
Social security and other taxes	<u>13,924</u>
	£ <u>20,763</u>

**5. RESERVES**

Surplus for the period	28,968
<u>Less</u> Transfer to designated reserves as follows:	
Extending localisation project	10,000
Regional prosperity project	7,000
Food wholesaler project	<u>500</u> <u>17,500</u>
Income and expenditure account at 31 March 2008	£ <u>11,468</u>

**Reserves at 31 March 2008:**

Extending localisation project	10,000
Regional prosperity project	7,000
Food wholesaler project	500
Income and expenditure account	<u>11,468</u>
	£ <u>28,968</u>

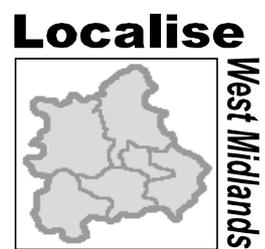
**6. COMPANY STATUS**

Localise West Midlands is a private company limited by guarantee, which does not have a share capital. Each of the members is liable to contribute an amount not exceeding £1 towards the assets of the company in the event of liquidation.

**LOCALISE WEST MIDLANDS**  
(Limited by Guarantee)

**DETAILED INCOME AND EXPENDITURE ACCOUNT  
FOR THE PERIOD 6 JULY 2007 TO 31 MARCH 2008**

<b>Turnover</b>		
Grants receivable		104,764
<b>Less Direct costs</b>		
Consultants fees	65,322	
Project and event costs	<u>1,155</u>	<u>66,477</u>
<b>Gross Income</b>		38,287
<b>Less Overheads</b>		
Directors remuneration	15,975	
Employer's national insurance	1,453	
Staff training	70	
Rent	591	
Telephone and fax	297	
Insurances	406	
Printing, postage and stationery	117	
Travel and subsistence	132	
Accountancy	470	
Sundry expenses	<u>46</u>	<u>19,557</u>
		18,730
<b>Less Incoming funds designated for forthcoming work transferred to reserves</b>		
Extending localisation project reserve	10,000	
Regional prosperity project reserve	7,000	
Food wholesaler project reserve	<u>500</u>	<u>17,500</u>
<b>Net income for the period</b>		1,230
<b>Add Assets received on ceasing of activities by unincorporated association, Localise West Midlands, on 6 July 2007</b>		
Bank balance		<u>10,238</u>
<b>SURPLUS FOR THE PERIOD</b>		£ <u>11,468</u>



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