



**Evaluation of the  
Building Change  
Trust**

**Year 1 Interim  
Evaluation Report**

**Final Draft**

**November 2010**



## Table of Contents

<b>I</b>	<b>EXECUTIVE SUMMARY</b> .....	<b>1</b>
<b>1</b>	<b>INTRODUCTION &amp; BACKGROUND</b> .....	<b>1</b>
1.1	Introduction.....	1
1.2	Background .....	2
<b>2</b>	<b>STRATEGIC &amp; OPERATING CONTEXT</b> .....	<b>5</b>
2.1	Introduction.....	5
2.2	C&V Sector Overview .....	5
2.3	C&V Sector Development .....	5
2.4	Current Strategic Drivers.....	8
2.5	Public Finances .....	8
2.6	Charity Legislation.....	16
<b>3</b>	<b>SET-UP &amp; EARLY DELIVERY OF TRUST</b> .....	<b>17</b>
3.1	Introduction.....	17
3.2	Building Change Trust ('The Trust') .....	17
3.3	Trust Activities - Progress to Date .....	27
3.4	Monitoring & Evaluation .....	36
<b>4</b>	<b>ENGAGEMENT WITH THE C&amp;V SECTOR</b> .....	<b>37</b>
4.1	Introduction.....	37
4.2	Sector Consultation .....	37
4.3	Conclusion.....	44
<b>5</b>	<b>CONSULTATION FINDINGS</b> .....	<b>45</b>
5.1	Introduction.....	45
5.2	Key Findings.....	45
<b>6</b>	<b>IMPACT OF THE TRUST FUND MODEL</b> .....	<b>52</b>
6.1	Introduction.....	52
6.2	Outcomes / Impacts .....	52
6.3	Assessing Outcomes / Impacts.....	53
<b>7</b>	<b>CONCLUSIONS &amp; RECOMMENDATIONS</b> .....	<b>54</b>
7.1	Conclusions.....	54
7.2	Recommendation .....	57
<b>8</b>	<b>NEXT STEPS</b> .....	<b>60</b>
8.1	Key Areas to Be Considered.....	60
<b>9</b>	<b>APPENDICES</b> .....	<b>61</b>

<b>Appendix I</b>	Board of Trustees – Experience
<b>Appendix II</b>	Timeline of Trust Activities
<b>Appendix III</b>	Explore Change Programme – Overview of projects proposed
<b>Appendix IV</b>	Deliver Change Programme – Overview of projects proposed
<b>Appendix V</b>	C&V sector organisations represented at consultation events
<b>Appendix VI</b>	Overview of C&V sector consultation event themes and discussions

---

# I Executive Summary

## I.1 Introduction

The BIG Lottery Fund ('BIG') commissioned FGS McClure Watters to undertake a two-year formative evaluation of the Building Change Trust ('The Trust') to assess: the set up and early delivery of the Trust; how effective this model has been in engaging with the Community and Voluntary (C&V) sector; and the impact of the Trust Fund model.

## I.2 Set-up & Early Delivery of Trust

### Inception

- The Trust was established in November 2008 by BIG's grant of £10m following the acceptance of a business plan "***Building Capacity for a New Paradigm***". The business plan was developed by the following bid partners: Community Foundation for Northern Ireland (CFNI); Community Evaluation Northern Ireland (CENI); Rural Community Network (RCN); Volunteer Now; and Business in the Community (BITC). The focus of the Trust's work is: underpinning community development; promoting volunteering; supporting partnerships; skills development; and infrastructure support.
- Although the £10m investment represents less than 2% of the annual income of the C&V sector to be expended over a 10 year period, it is considered to be a substantial investment by BIG in the context of a "*programme for change*" model.
- Citi Quilter has been appointed as investment manager – a return of 3.5% has been achieved, against an initial target of 5%, which can be regarded as a success given the current context of an economic downturn.

### Governance

- The original bid partners transferred authority and responsibility for the management of the Trust to nominated Trustees in January 2009.
- A Service Level Agreement is in place between the Trust and CFNI in respect of administration services, which remains in force until 31st December 2019, subject to a 'Good Faith Review' during the fifth year.
- On 15th-16th January 2010, the Trust organised a strategy development event which represented a substantive move forward in the development of the Trust's mission, vision and aims. One of the outputs of this meeting was the augmentation of the original business plan's mission from "*Tomorrow's Sector, Today*" to '*Investing in social change: working to make today's challenges tomorrow's opportunities*'.
- The Trust's Strategy 'Investing in Social Change' (2010-2013) was launched on 7<sup>th</sup> May 2010, highlighting the following distinct offerings of the Trust Model: *More than grant making; Supporting Innovation; Learning and Sharing; and A Strategic Focus on Change*.
- A Protector has been nominated by BIG, responsible for safeguarding public monies. The Protector has highlighted the following key issues relating to governance: the perception that the original 'bid partners' are not wholly independent of the Trustees; and appointments of the directors in breach of Article 82 of the Articles of Association which gives each of the bid partners the right to appoint one director "*who shall not be an employee or officer of that body*'.

- The Trust recognised the need to create a stronger identity and to reinforce independence and have enhanced this through the development of a separate website for the Trust; communication through events, seminars and resources circulated to the sector; and by having e-mail and other contact addresses. Appointments of the directors in breach of Article 82 have been ratified by the members of the Corporate Trustee.

### **Trust Activities - Progress**

The various strands of support provided by the Trust and the progress to date are summarised below. Please refer to Section 3.3 for further details:

- **Bid Partner Projects:** Five awards, totalling c£1.2million, have been allocated to the bid partners as part of the initial transformative awards programme proposed in the original business plan to cover the period 1<sup>st</sup> January 2009 until 31<sup>st</sup> December 2011. Each organisation will be concerned with supporting community development and enhancing the skills and capacity of the sector. The bid partners have also invested a lot of time and effort in the creation and development of the **Catalyst for Change initiative**, in response to the need to work collectively rather than working in isolation on their respective projects. Based on resources available, two pilot sub-areas within the district council areas of Omagh and Fermanagh and North Down and Ards have been targeted for support. The selection of the two pilot areas was based on the analysis of CENI's Social Assets model. This model mapped the levels of 'Bonding', 'Bridging' and 'Linking Social Capital' across each district council area as well as the levels of community organisation and capability. By adopting this approach, the bid partners will identify what the community has to offer and then utilising this to take forward positive change. An internal evaluation has been drafted by CENI, on behalf of the bid partners, to capture key achievements, which will be finalised by December 2010 and published in January 2011.
- **Award Programmes:** Following consultation with the C&V sector, the Trust launched two new awards programmes, Exploring Change and Deliver Change, on 7<sup>th</sup> May 2010. The Trust is interested in projects that are innovative and have the potential to explore/deliver change to enhance future sustainability to help influence the wider sector. Significant progress has been made in the development and launch of the award programmes. The first 23 awards were announced on 25<sup>th</sup> November 2010.
- **Sector Support Programme:** A sector support programme has been tendered, in response to the needs articulated in the C&V consultations events to deal with the issue of collaboration, partnership and mergers. The contract has recently been awarded to Northern Ireland Council for Voluntary Action (NICVA) and the 'Chief Officers Third Sector ('CO3').
- **Loan Fund:** The original business plan detailed the potential to establish a £2m permanent loan fund for the NI C&V sector through the Trust. The aim is to support organisations to adapt to changing environment from short-term funding and dependency on grants to longer-term sustainability focused on social investment and a focus on output/ impacts as a result of funding. It is envisaged that the permanent loan fund is to deliver a legacy impact from the Trust. On 26<sup>th</sup> March 2010, Trustees agreed to firstly allocate £1m with an additional £1m to be ring fenced for further social finance, subject to satisfactory performance. This project will be launched on 7<sup>th</sup> December 2010 and the Trust, in collaboration with Charity Bank, have organised a community assets seminar on 14<sup>th</sup> December 2010.

### I.3 Impact of the Trust Model

- **The development of the Trust Model has facilitated increased capacity in the sector**
  - The establishment of the Trust has helped to increase capacity by drawing together a consortium of like-minded individuals who will collectively have a positive influence within the C&V sector. The extent of this influence will be increasingly evident upon further implementation and roll-out of interventions.
  - Increased capacity among groups and organisations to date is limited as the Trust is in its inception stage where engagement has focused on dialogue with relevant stakeholders to establish community needs in the first instance. The Trust has now developed interventions to respond to these needs. The resulting programme of support will lead to increased capacity initially among grant recipients and subsequently the wider sector through shared learning events.
- **Capacity has been utilised within the C&V Sector**
  - The capacity of the Trustees and bid partners has been utilised within the C&V sector through the development of the Trust and associated projects.
  - Furthermore, capacity has been utilised by engaging the C&V sector in consultation events in order to inform the development of interventions.
  - An Advisory Panel, which includes representatives from the wider sector, has also been established to support CFNI's Observatory project.
  - Based on the level of interest from C&V organisations at consultation events and the interest in the award programmes, which were oversubscribed, awareness of the Trust is evident throughout the sector. Sharing and dissemination of good practice will be achieved at a later stage, upon the implementation and completion of programme interventions.
- **Partnerships been developed and supported within the Trust and between sectors**
  - The development of the bid partners Catalyst for Change initiative provides evidence that collaborative links have proactively been developed.
  - Partnerships with organisations in the private sector are also evident, For example, BITC are consulting with Business Leadership Networks across NI which aims to profile the quality of existing relationships between C&V sector and opportunities for future collaboration. A pilot Business Leadership Network has also been created in Enniskillen.
  - Partnerships have also been created through CFNI's Observatory's Advisory Panel.
  - Increased communication and collaboration between the Trustees and bid partners is needed to maintain and build on partnerships established through the development of the Trust.
- **The Trust Model links to the priorities in the Review of Public Administration (RPA) and other relevant strategies**
  - The Trust aims to support the development of a sustainable infrastructure so that the sector will be capable of meeting future challenges within the context of reduced public finances. By working collaboratively across a range of organisations and sectors, the Trust can contribute to bringing greater efficiencies and coherence to the identification of local 'need' and resulting decisions on how best to address need.

- The Trust's programme of services offers the opportunity to contribute to BIG's outcome for the Trust that "*People can actively participate in their communities to bring about change*"; and the Coalition's vision for the 'Big Society'.
- It is too early to conclude on whether there are any emerging factors which will lead to changes in policy. It is important that learning emanating from projects funded by the Trust is captured and shared to the wider sector to help influence change.
- **Impact of the Trust Model**
  - To date the Trust's operations for Year 1-2 have involved establishing and profiling community assets and needs. This will be followed by Year 2-3 of operations, which will focus on targeting and allocating resources for capacity/asset building. Investment into direct support, transformation and loan grants has only recently been made (end of Year 2).
  - It is too early therefore to conclude on whether the funding provided through the Trust has had a transformational impact on the C&V sector and disadvantaged communities in NI. Conclusions regarding how effective and efficient the model is in terms of a support mechanism for the C&V sector cannot be provided at this stage. However, early indications suggest that there is a both need and a demand for the services being offered, evident by high attendance levels at events organised by the Trust and programmes being oversubscribed.

## I.4 Recommendations

The recommendations from the interim evaluation include:

### Wider Policy Influence

- The Trust may wish to consider **further engagement** with key stakeholders within the **NI Executive** upon the completion and evaluation of the first phase of activities to share learning and to stimulate discussions to influence and drive future policy change.

### Implementation

- Although issues relating to governance arrangements have been resolved to a large extent, it is important for the Trustees and bid partners **continue to build on relationships** and focus on gaining momentum in the operational roll-out of activities. BIG representatives should be fully informed of any emerging issues by the Protector.
- **Clarity surrounding roles**, responsibilities and linkages should be provided with regard to the bid partners' status in comparison to other grant recipients.
- The role of the Protector has proven to be beneficial in helping to support the initial and on-going development of the Trust and in ensuring robust governance processes are in line with good practice and meet the requirements of the Trust Deed. BIG should **continue to support the role of the Protector**, as an independent watchdog, responsible for safeguarding public monies and ensuring the integrity of the administration of the Trust.
- As the Trust moves towards the roll-out and completion of activities, Trustees may wish to consider the **development of a Strategic Programme Panel and/or learning circles** (as per the original business plan) to help capture learning and to generate discussion on

transformational change. BIG representatives should also consider their involvement in such a Panel to utilise their capacity as a body driving change initiatives.

- The Trust may want to consider the increased inclusion of **representatives from the private sector** in order to encourage networking on a cross-sectoral basis.
- The need for **increased communication** between the Trustees and bid partners is evident, based on feedback from consultees. Regular formal and informal communication should be encouraged through email, telephone and face-to-face contact. A formal six monthly meeting should be considered to facilitate the process of knowledge sharing, assessing progress and agreeing strategic direction.
- The level of work and input from the Trustees, in their voluntary capacity, should be monitored to **ensure** that the workload is not excessive and that the **role is sustainable**.
- The Trust should continue to focus on **consulting widely with the C&V sector**, in order to seek their views on the support required and to disseminate learning from interventions.
- To enhance the effectiveness of communication regarding the Trust and to ensure **consistent brand awareness**, it is important that the Trust's website and associated bid partner's website contain **relevant, up-to-date information** in a standard format utilising the combined BIG and Trust logo. It is important the Trust's aims and activities are clearly communicated.
- It is fundamental that the Trustees and bid partners **continue to develop monitoring and reporting systems** to ensure that learning is being adequately captured. Outcomes and impacts that will derive as a result of forthcoming programme activities will help to focus the Trust in their management and allocation/targeting of future support throughout the lifetime of the Trust, until 2018.

# 1 INTRODUCTION & BACKGROUND

## 1.1 Introduction

The BIG Lottery Fund ('BIG') commissioned FGS McClure Watters to undertake an evaluation of the Building Change Trust ('The Trust') in Northern Ireland (NI).

This two-year formative evaluation will involve assessing the following:

1. *Set up and early delivery of the Trust;*
2. *How effective this model has been in effectively engaging with the Voluntary and Community sector; and*
3. *Impact of the Trust Fund model.*

The evaluation will provide independent verification of the Trust's achievements will make recommendations for future development.

The evaluation will be conducted over a two year period. Year 1 of the evaluation will cover Trust activities over the period November 2008-December 2010. Year two of the evaluation will assess the Trust activities during the period January 2011-December 2011.

**Table 1.1**  
 Summary of Operations and Evaluation Period

Evaluation Period	Contract	Focus of Evaluation	
		Year of Operation	Activities
Year 1		<b>Year 1:</b> Nov 2008 -Dec 2009	Establishment and profiling community assets and needs
		<b>Year 2:</b> Jan 2010-Dec 2010	
Year 2		<b>Year 3:</b> Jan 2011-Dec 2011	Targeted capacity / asset building and transformation with RP

Please note that that final evaluation report will be completed by 31<sup>st</sup> January 2012, which will be cumulative in nature, reflecting all research activity in Year 1 and Year 2.

**The purpose of this first interim report is to provide a summary level overview of the Trust activities to date and to highlight key lessons for BIG.**

Consultations have been carried out with the following stakeholders: BIG representatives, BIG's NI Committee, Trust Administrator, seven Trustees, Protector and the five bid partners. Going forward, consultations will also involve engagement with project beneficiaries to include questionnaires and case study development.

---

## 1.2 Background

### 1.2.1 *BIG Lottery Fund ('BIG')*

BIG is a non-departmental public body, sponsored by the Department for Culture, Media and Sport (DCMS) which operates in all regions of the UK. BIG was formed from an administrative merger between the New Opportunities Fund and the Community Fund in June 2004. BIG's mission states:

***“We are committed to bringing real improvements to communities and to the lives of people most in need”***

BIG's focus is on the difference that their funding makes, rather than on the organisations who receive funding. BIG makes grants to organisations in the public and private sectors and the voluntary sector. BIG recognises the vital role that the community and voluntary sector plays in reaching out to grass roots in communities, engaging people and inspiring confidence, where others may find it difficult. BIG believe that a strong and well-resourced community and voluntary sector is crucial to a healthy and well-functioning society.

In Northern Ireland, BIG has invested over £480 million since 1995, providing support for more than 10,500 projects. The three UK-wide themes underpinning all of BIG's programmes are:

- Supporting community learning and creating opportunity;
- Promoting community cohesion and safety; and
- Promoting well-being.

BIG's aim for the Trust, and for the work it supports, is to build the capacity of the community and voluntary sector by equipping it to meet the changing needs of disadvantaged communities in Northern Ireland. The work that the Trust supports must achieve the following outcome:

***“People can actively participate in their communities to bring about change”***

It is BIG's intention that the Trust will provide a legacy that extends beyond the life and scope of the funding and will have a transformational impact on the community and voluntary sector and disadvantaged communities in Northern Ireland.

The Trust will support BIG's underlying principles by:

- Addressing disadvantage and promoting tolerance and social inclusion; and
- Contributing to the reduction of poverty.

And BIG's priorities to:

- Build community capacity; and
- Increase the opportunity for volunteering and engagement within and between communities.

The Trust will address five specific areas and provide support that will facilitate change to happen. These areas are:

- Underpinning community development;
- Promoting volunteering;
- Supporting partnerships;
- Skills development; and
- Infrastructure support.

### **1.2.1 Terms of Reference**

The Terms of Reference (ToR) for this formative evaluation can be found below:

**Table 1.2**  
 Evaluation ToR

ToR
<ul style="list-style-type: none"> <li>• The evaluation will involve consideration of the extent of progress on the following issues:               <ul style="list-style-type: none"> <li>– How has the development of the Trust model facilitated increased capacity and is there evidence that capacity has been strengthened to date?</li> <li>– Has capacity been utilised within the Voluntary and Community Sector?</li> <li>– What progress, including target setting, has been made by the three streams of provision offered by the Trust?</li> <li>– How have partnerships been developed and supported within the Trust and between sectors?</li> <li>– Is the Trust model an effective and efficient support mechanism for the Voluntary and Community Sector?</li> <li>– Are there any emerging factors that may lead to changes in the Voluntary and Community Sector during the lifetime of the programme in addition to the Trust?</li> <li>– How has the Trust shared and disseminated good practice in the Voluntary and Community Sector?</li> <li>– How does the model link to the priorities in the Review of Public Administration and other relevant strategies?</li> <li>– Has the development of the Trust model facilitated learning across the Voluntary and Community Sector?</li> <li>– How has the Trust addressed the changing needs of disadvantaged communities in NI?</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• Provide a detailed and thorough assessment of the achievements of the Trust against the stated aims and objectives in particular focusing on:               <ul style="list-style-type: none"> <li>○ Achievements against the three year plan; and</li> <li>○ Progress against strategic objectives.</li> <li>○ Views of beneficiaries</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• To make recommendations in a timely way in relation to improvements in operation and future strategy for the next phase of the Trust’s operation.</li> </ul>

**Please refer to Section 7, which summarises the key conclusions under each of these ToR requirements.**

## **1.2.2**      ***Report Structure***

The report is structured under the following headings:

- **Section 1:**      Introduction & Background
- **Section 2:**      Strategic & Operating Context
- **Section 3:**      Set-up & Early Delivery of Trust
- **Section 4:**      Engagement with the C&V Sector
- **Section 5:**      Consultation Findings
- **Section 6:**      Impact of the Trust Fund Model
- **Section 7:**      Conclusions & Recommendations

## 2 STRATEGIC & OPERATING CONTEXT

### 2.1 Introduction

This section provides an overview of the profile of the Community and Voluntary (C&V) sector in Northern Ireland (NI) and the strategic context framing the establishment and implementation of the Trust.

### 2.2 C&V Sector Overview

According to the Northern Ireland Council for Voluntary Action (NICVA) ‘State of the Sector V’ report (2009), there are an estimated **4,700** C&V sector organisations in NI. In addition, there are approximately 500 local or branch offices and projects that are linked to C&V organisations.

The C&V sector is an important employer in NI. The latest estimate is that the sector employs **26,737** individuals, representing 3.7% of the total NI workforce. This is a decrease of 7.6% since 2005 when it was estimated that 28,932 staff were employed in the sector.

In relation to volunteers, estimates indicate that there are approximately **87,723** individuals who volunteer with a C&V sector organisation. Between 1995 and 2007 (latest available information) the proportion of volunteers of the entire population has only increased by 3%.

### 2.3 C&V Sector Development

The strategic and operating context in which the NI C&V sector operates has evolved over the last 12 years. An illustration of key developments can be found in the table below.

**Table 2.1**  
 Key Developments

Date	Description
October 1998	Joint Government C&V Sector Forum was established to give the C&V sector the opportunity to meet regularly with Government Departments. The Forum was responsible for continuously reviewing and improving the channels of communication between Government and the C&V Sector. The forum consisted of Government representatives and a cross section of representatives from the C&V sector.
December 1998	A ‘ <b>Compact</b> ’ Between Government and the C&V Sector in NI was published. The Compact is a “jointly prepared, agreed statement of the general principles and the shared values which will govern the further developments of the relationship between Government and the C&V Sector in NI”. The remit of Compact is to clarify respective roles in the relationship between Government and the C&V sector; establish the shared values and principles which underpin the partnership; and, identify commitments to ensure values and principles will govern future relationships between Government and the sector.
June 2001	‘ <b>Partners for Change</b> ’ (2001-2004) the Government’s strategy for the support of the C&V sector is published for consultation. The strategy set out a programme of action across every Government Department over a three year period. The publication of the strategy was listed as a policy priority in the Programme for Government under the heading of ‘Working Together’. Commitments are made in the areas of neighbourhood regeneration, the economy, transport, the environment, rural development health and social services, education, training, the arts, sport, and EU funding programmes. The

Date	Description
	'Partners for Change' strategy was to underpin and take forward the principles agreed in the Compact between Government and the C&V sector.
February 2003	The Minister for Social Development set up a <b>Task Force on 'Resourcing the C&amp;V sector'</b> . The Task Force's remit was to ensure that the Sector continued to make a substantial contribution to the achievement of Government objectives and to the well-being of the NI community beyond 2006, when the funding from the European Union was expected to decline. The Task Force was to identify the impact of changes to the funding programmes and highlight what action was necessary to diversify support for the sector. Task Force membership was drawn from government departments and agencies, one of the health and social services boards, Belfast City Council, academia and the C&V sector.
December 2003	The Task Force consulted with the Sector through ' <b>Pathways for Change</b> '. Key themes were, funding, accountability, relationships and infrastructure and it also looked at the idea of social investment for the future sustainability of the sector. NICVA held consultation meetings with the sector to discuss the proposals in the consultation document. While welcoming it in general, they expressed some concerns. Central was still the issue of core funding where; <i>'C&amp;V organisations continue to find that funding is too short, too project-based, too programmatic; that there is insufficient funding for core costs, and that core costs are not broadly enough defined'</i> . It was felt that the consultation document alluded to the issue rather than addressing it precisely.
October 2004	Task Force published their report ' <b>Investing Together: The report of the Task Force on 'Resourcing the C&amp;V sector'</b> '. Key recommendations included: <ul style="list-style-type: none"> <li>• Funding Approaches – Government should adopt a ten-year planning framework that ensures a level playing field and supports a mixed economy of activities;</li> <li>• Community Development – Long-term stable funding should be made available for the support of local community development activity;</li> <li>• Internal Governance, Management and Accountability – A coherent system for monitoring, evaluation and audit of statutory funding to the Sector should be implemented across Government including an explicit good governance standard as a pre-condition for funding support; and</li> <li>• Change Drivers – Structures for engagements between Government and the Sector should be reviewed and strategies developed for skills development, ICT usage and support services to local C&amp;V organisations.</li> </ul>
March 2005	The Department for Social Development (DSD) published ' <b>Positive Steps</b> ', the Government's response to the report of the Task Force. Government stated they would provide an additional £23m over the next three years to help support the changes recommended by the Task Force. Proposed action to be taken forward as a result of 'Positive Steps' included the: <ul style="list-style-type: none"> <li>• Establishment of a Community Investment Fund to support community development activity;</li> <li>• Modernisation Fund to promote modernisation and change within the sector;</li> <li>• Movement towards a longer-term funding and planning framework;</li> <li>• Improving the system of governance and accountability in the C&amp;V sector; and</li> <li>• Streamlining the audit and accountability of funding to the sector.</li> </ul> Positive Steps also recommended the establishment of an Implementation Group consisting of senior officials within each Department and Chaired by the Minister responsible for Social Development to ensure the momentum generated by the Task Force was maintained.
2006	Key actions to implement the policy and strategic framework for a shared future and good relations in NI were outlined in the Triennial Action Plan 2006-2009. In relation to the C&V sector, DSD was nominated as the lead department responsible for providing a range of strategic funding programmes in support of the voluntary and community sector across NI which would integrate and add value in supporting the development of communities through Neighbourhood Renewal.
February 2007	The Government's response to the Task Force on Resourcing the C&V sector, Positive Steps, confirmed that DSD would lead the development of a strategy for support services which would address benchmarks and performance standards for support organisations to help ensure consistency of service provision. Publication of research report on the C&V Support Services Strategy. The research outlined the core functions of support services, principles governing support services, information from interviews with organisations providing support to the sector, and the opinions of agencies which

Date	Description
	fund support work.
March 2007	DSD published ' <b>Evaluating Progress: Government's report on the Implementation of Positive Steps</b> '. The report stated that there had been considerable progress against the majority of recommendations contained within Positive Steps but recommended that further implementation and monitoring of progress be taken forward by the Positive Steps Implementation Group.
July 2007	<p>The Minister for Social Development welcomed the Executive's endorsement for '<b>Partners for Change</b>' (2006-2008). It is a cross departmental strategy for partnership with the C&amp;V sector. Partners for Change covers the period up to 2008 and was developed in response to a commitment given in the Compact to develop a supporting strategy to implement the Compacts values and principles. The strategy is described as an Action Plan that identifies the work that Government Departments plan to undertake in partnership with the C&amp;V sector. Each Department has provided a statement of its commitment to work with the C&amp;V sector. The C&amp;V sector participated in the development of the plan through the Strategy Sub-Group of the Joint Government/C&amp;V Sector Forum. Its three key themes are:</p> <ul style="list-style-type: none"> <li>• Building Communities/Promoting Active Citizenship – encourage voluntary activity and the involvement of communities (both "geographic" and "of interest") in the planning and decision-making process about matters which affect them;</li> <li>• Shaping Policy Development/Working Together – ensure that the knowledge and expertise of the Sector informs policy development and that policies are sensitive to the needs of those who experience disadvantage; and</li> <li>• Investment in the Sector/Capacity Building – build the capacity of the Sector to make an effective, continued contribution to society in NI.</li> </ul>
September 2007	Publication of ' <b>Opening Doors</b> ' the Strategy for the Delivery of Voluntary Advice Services to the Community. The strategy is designed to ensure that advice centres are available in areas where they are needed most and to ensure that there is no duplication in service between service providers. DSD was to work in partnership with the Advice Services Alliance (ASA) to look at issues such as the recruitment, training and retention of staff providing advice and support services.
September 2007	Publication of ' <b>It's all about time</b> ', a research report into volunteering in NI. The report was produced by the Voluntary Development Agency and was funded by DSD. The research was part of the Development's work on the development of a Volunteering Strategy for NI. The Department have established a Volunteering Strategy Steering Group. The Volunteer Development Agency, in partnership with the Institute of Volunteering Research, worked with DSD to produce a draft consultation document for the Minister to consider and approve.
October 2008	NICVA publishes its final monitoring report of the impact of ' <b>Positive Steps</b> '. NICVA has conducted a twice yearly assessment of the perceived progress of Positive Steps over a three year period. The report states that overall respondents believe that there is more awareness of Positive Steps and the implementation process and that progress has been made. However, the report also states that there remains a sense amongst the C&V Sector that it has been a missed opportunity to radically overhaul the funding environment and how the Government and the Sector interact.
October 2008	NICVA issues a report calling for the NI Executive to agree to develop a White Paper on the relationship between the Government and the C&V sector.
November 2009	<p>DSD publishes Governments Final Report on the Implementation of Positive Steps. This report outlines that there has been progress against a majority of the commitments made within Positive Steps and these have resulted in significant changes and greater consistency of practice. However there are a small number of relatively complex Positive Steps commitments that remain to be fully implemented and DSD officials have been asked to work with the Joint Government / C&amp;V Sector Forum to ensure that these are delivered. These outstanding commitments fall under two main categories:</p> <ol style="list-style-type: none"> <li>1) Relationships between Government and the sector; and</li> <li>2) Developing processes of audit and accountability for the sector that minimise the bureaucratic burden whilst providing the necessary assurances on public expenditure.</li> </ol>

Source: FGS McClure Watters & NI Assembly

---

## 2.4 Current Strategic Drivers

The C&V sector is being and will be impacted by a number of drivers of change in the coming years, for example: reduced public finances, the Coalition's vision for the 'Big Society', uncertainty surrounding the review of public administration, draft concordat between Government and the C&V sector, and charity legislation.

Further detail is provided on each of these strategic drivers of change in the section below.

## 2.5 Public Finances

### 2.5.1 *Public Finances Overview*

In recent months, especially around the time of the UK national elections and ever since the Coalition Government came to power, the key economic and public policy issue on the agenda has been the state of public finances and how quickly to reign in the record size of the UK deficit. This has been by no means a unique issue for the UK with many economies across the world facing similar fiscal problems, including in the Republic of Ireland and perhaps most publicised, in Greece.

### 2.5.2 *Recent Public Spending Trends*

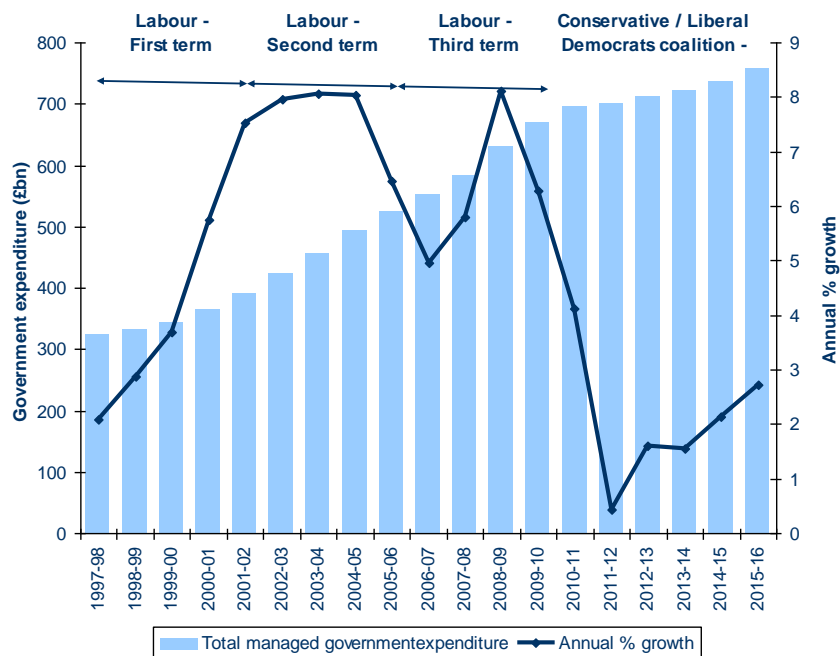
When elected in 1997, the previous Labour Government initially adopted a strategy of prudence towards public expenditure, maintaining aggregate spending plans from the previous Conservative Government. The annual percentage growth in public spending however gradually increased towards the end of the first election term, and remained high throughout most of Labour's entire second term (7-8% growth in nominal terms).

In Labour's third term from 2005-2010, spending growth was lower relative to the previous term (Figure 2.1). However, in the final year of Labour's third term expenditure growth increased substantially (though this was partly as a result of 'automatic stabiliser' spend in response to the recession, e.g. increased unemployment benefits etc., as well as bank bail outs).

The patterns in UK public spending naturally fed through to higher public spending in NI. While in the long-run the Barnett formula for allocations to the devolved regions is intended to equalise per capita public spending, it only does so over the very long-term and in some cases, 'special' funding or concessions to the NI Executive can have a greater impact.

As a result of Labour's public spending decisions, the state's share of UK GDP increased from 37% in 2000 to 48% in 2008, and 52% today. It is noteworthy that in some parts of the north of the UK, including in NI, the state now accounts for a larger share of the economy than it did in communist countries in the old eastern bloc. Even when the UK economy had been enjoying long periods of economic expansion, the Labour Government did not always run a budget surplus (Figure 2.2).

**Figure 2.1**  
UK Total Managed Expenditure



Source: HM Treasury

The financial market crisis then had further serious implications for UK public finances, as banks needed to be ‘bailed out’ by the government, which has significantly increased net borrowing.

### 2.5.3 Current Fiscal Crisis

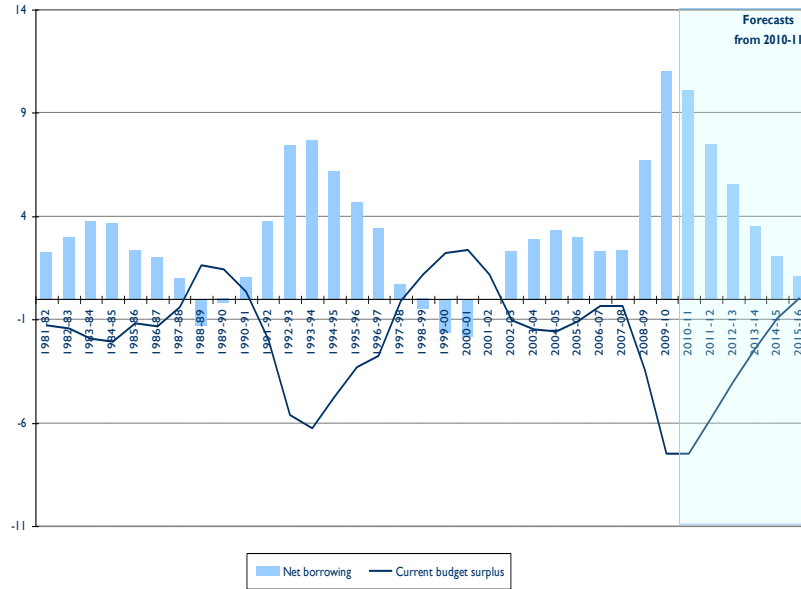
It is well documented that the UK’s public borrowing had risen to unprecedented levels, and is currently at £155bn this year (11% of GDP). The UK’s total debt, which currently stands at more than 62% of GDP, is forecast to peak at 70% of GDP in 2013/14.

The deficit has risen to nearly twice the size of the shortfalls seen during previous economic downturns in the 1970s and early 1990s. The scale of the deficit highlights the extent of the challenge the new UK Coalition Government is facing.

The coalition has pledged that the budget deficit will fall to 1.1 per cent, or £20bn, by 2015/16<sup>1</sup>. With spending cuts, as opposed to tax rises, widely seen as the more effective and less damaging way to reduce deficits, this stance has clear implications for future public spending growth.

<sup>1</sup> The UK government faces similar pressures from the European Commission, as other EU countries, which has vowed to ‘police’ national budgets at an early stage and introduce a wider range of sanctions on excessive deficits to prevent a repeat of the Greece-fuelled debt crisis that has undermined the Euro. Finance ministers agreed to impose fines on countries that fail to deliver on deficit-cutting pledges even before deficits surpass the limit of -3% GDP. Under the EU Stability and Growth Pact agreement, countries with deficits below the -3% GDP limit face fines of as much as 0.5 per cent of GDP unless they get their budget back into compliance.

**Figure 2.2**  
UK Budget Balance (1981/82-2015/16)



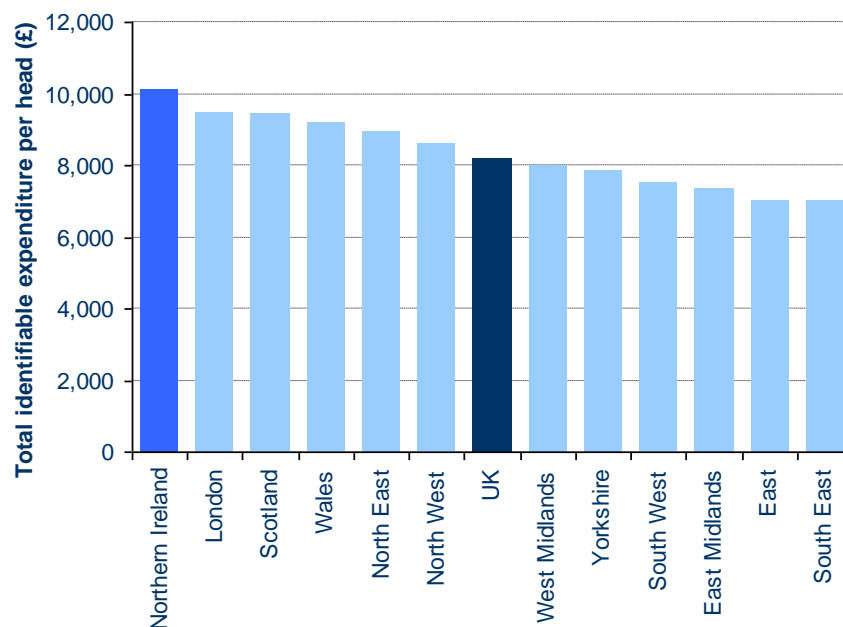
Source: HM Treasury

### 2.5.4 NI's Public Spending Allocation

Historically NI has received a generous public expenditure allocation from HM Treasury with levels of public spend per capita in NI well above the UK average and in fact any other UK region (Figure 2.3). As such, the recent Coalition Government's Comprehensive Spending Review in October 2010 will clearly have a significant impact on NI's public expenditure driven and dependent economy.

**Figure 2.3**

Total identifiable Government expenditure per head (2008/09)



Source: HM Treasury

In proportion to the rest of the UK, NI has a greater percentage (29%) of employees in the public sector than Scotland (23%), Wales (24%) and the UK average (20%).

Public spending accounts for over two-thirds of GVA in NI. It is important however to remember that the Executive has powers over how the block grant that NI receives is allocated, so sector cuts at UK level need not necessarily read directly across to NI. The Executive will have some very important decisions to make on how the cuts across the public sector will be distributed, or alternatively seek some method of raising finance from within NI such as selling public assets in order to raise finance for spending on public services.

### **2.5.5 October 2010 Comprehensive Spending Review**

The Coalition Government announced the UK Comprehensive Spending Review (CSR) on 20th October 2010. According to the document, the government will invest £470 million in the C&V sector over the next four years. This includes a short-term £100 million transition fund to help non-profit organisations adapt to the economic conditions.

NI's overall grant allocation, which is currently in the region of £9.3 billion, will be £9.4 billion in 2011-2012 and only £9.5 billion at the end of the four year period, an accumulative fall of 6.9% in real growth. The local capital budget is reported to be significantly impacted with proposals to reduce local capital projects from £1.2 billion this year to £0.8 billion by 2014-2015 (a cut in real terms of 37%).

The NI Executive is currently preparing a Draft Budget for the local economy which is expected to be released in late November or early December 2010.

#### **Impact on the C&V Sector**

The latest figures from the NICVA<sup>2</sup> indicate that income in the C&V sector in 2006/07 was estimated to be **£570.1 million** (Table 1.3). An overall decline in the income of the sector has continued, falling by 7.2% (£44.4m) since 2003/04 figures which reflects a reduction in the amount of funding available across a number of sources.

The most dramatic reduction was in Peace II funding which made up just 1.9% of the overall income of the sector. For instance, in 2003/04 the community development sub-sector was dependent upon 21.2% of its funding from Europe, this figure is now 3.1%.

Given that approximately 45% (Table 1.3) of the income of the C&V sector in NI comes from government sources, via departments, non-departmental public bodies (NDPBs) and other agencies, the outcome of the CSR budget for NI could pose a real threat to the capacity and capability of significant parts of the C&V sector.

It is therefore important to establish the priority needs within the C&V sector in NI to ensure the effective delivery of community development and capacity building in circumstances of reducing public expenditure and to develop new innovative ways of working.

**Table 1.3**  
**C&V Sector – Sources of Income**

<b>Funding Source</b>	<b>£million</b>	<b>% of Total Income</b>
Government	£259.1	45.4%
General Public	£180.1	31.6%
Voluntary	£54.0	9.5%
Lottery	£29.0	5.1%
Europe	£10.6	1.9%
Business	£11.5	2.0%
Internal	£17.1	3.0%
Other	£8.7	1.5%
<b>Total</b>	<b>£5,701</b>	<b>100%</b>

<sup>2</sup> Northern Ireland Council for Voluntary Action 'State of the Sector V' report (2009) <http://www.nicva.org/publications/state-sector-v>

NICVA ‘*Smart Solutions in Tough Times campaign*’ is highlighting the strengths of the C&V sector. By gathering evidence, organising roundtable meetings with government departments, holding one-to-one briefings with Ministers, MLAs and key officials, briefing Assembly committees and running a media campaign, this campaign will encourage government departments to fully consider the priorities of the third sector.

In addition to reduced funding, there is increased focus on the effective and efficient use of public funds. The key recommendations outlined in the HM Treasury Guidance ‘*Improving financial relationships with the third sector: Guidance to funders and purchasers*’ (2009) are:

- **Stability in the funding relationship:** moving from one year funding to longer-term funding arrangements where appropriate;
- **Timing of payments and the balance of risk:** recognising that payment in arrears often results in the third sector bearing the upfront costs of borrowing and the risks that this entails;
- **Full cost recovery:** ensuring that funding bodies recognise that it is legitimate for third sector organisations to recover the appropriate level of overhead costs associated with the provision of a particular service; and
- **Reducing the burden of bureaucracy:** streamlining access and performance management requirements for multiple, and often very small, funding streams.

As a result of the above, there is an increased focus on good governance and on value for money, where more information on the outcomes and impact of funding is required.

**Strategic Fit**

The £10million grant allocated to the Trust from BIG will provide much needed investment in supporting the C&V sector to adapt to the changing environment and to help organisations to develop new, innovative ways of working

The Trust will address support that will have a transformational impact. The focus of support will be in the following areas: underpinning community development, promoting volunteering, supporting partnerships, skills development and infrastructure support.

Although the investment of funding from BIG represents less than 2% of the annual income of the sector to be expended over a 10 year period, it is considered as a substantial investment by BIG in the context of a “*programme for change*” model, which will identify what the community has to offer and then utilising this to take forward positive change, rather than a traditional grants programme.

The Trust will aim to provide a legacy that extends beyond the life and scope of funding and will positively impact the C&V sector and disadvantages communities in NI.

### 2.5.1 **Government’s ‘Big Society’ Concept**

The **Big Society** was the flagship policy idea of the 2010 Conservative Party general election manifesto and forms part of the legislative programme of the Conservative – Liberal Democrat Coalition Agreement. The aim is “*to create a climate that empowers local people and communities, building a big society that will ‘take power away from politicians and give it to people*’.

The plans include setting up a Big Society Bank and introducing a national citizen service. The stated priorities and planned actions are presented in the box below:

**Give communities more powers**

- We will radically reform the planning system to give neighbourhoods far more ability to determine the shape of the places in which their inhabitants live.
- We will introduce new powers to help communities save local facilities and services threatened with closure, and give communities the right to bid to take over local state-run services.
- We will train a new generation of community organisers and support the creation of neighbourhood groups across the UK, especially in the most deprived areas.

**Encourage people to take an active role in their communities**

- We will take a range of measures to encourage volunteering and involvement in social action, including launching a national ‘Big Society Day’ and making regular community involvement a key element of civil service staff appraisals.
- We will take a range of measures to encourage charitable giving and philanthropy.
- We will introduce a National Citizen Service. The initial flagship project will provide a programme for 16 year olds to give them a chance to develop the skills needed to be active and responsible citizens, mix with people from different backgrounds, and start getting involved in their communities.

**Transfer power from central to local government**

- We will promote the radical devolution of power and greater financial autonomy to local government, including a full review of local government finance.
- We will give councils a general power of competence.
- We will abolish Regional Spatial Strategies and return decision-making powers on housing and planning to local councils.

**Support co-ops, mutuals, charities and social enterprises**

- We will support the creation and expansion of mutuals, co-operatives, charities and social enterprises, and support these groups to have much greater involvement in the running of public services.
- We will give public sector workers a new right to form employee-owned co-operatives and bid to take over the services they deliver. This will empower millions of public sector workers to become their own boss and help them to deliver better services.
- We will use funds from dormant bank accounts to establish a Big Society Bank, which will provide new finance for neighbourhood groups, charities, social enterprises and other nongovernmental bodies.

**Publish government data**

- We will create a new ‘right to data’ so that government-held datasets can be requested and used by the public, and then published on a regular basis.
- We will oblige the police to publish detailed local crime data statistics every month, so the public can get proper information about crime in their neighbourhoods and hold the police to account for their performance.

Source: <http://www.cabinetoffice.gov.uk/media/407789/building-big-society.pdf>

A recent survey of 266 charities, which was carried out by the Charities Aid Foundation (CAF), found that:

- 46% of the UK’s charities believe that the Government’s vision of a “Big Society” can work if given the resources to do so. However, 67% are concerned about their finances for the coming year and many fear the impact of public sector cuts.
- Over the next twelve months, 56% think they will see an increase in costs, 43% think that the public sector cuts will affect their charity, 41% believe that they will see a drop in voluntary donations and while 38% think that demand for their services will increase.
- Many charities are sceptical about the “Big Society” concept with 54% believing that it makes it acceptable for the Government to stop providing basic public services, and 35% worrying that resources provided by the “Big Society” will only be there for the short term. Yet over a fifth think this Government move will empower local communities and encourage more people to volunteer.

**Strategic Fit**

The 'Big Society' concept is in keeping with the aims and objectives of the Trust in terms of building community capacity, empowering individuals and increasing the opportunity for volunteering and engagement within and between communities, thereby also supporting BIG's outcome for the Trust that *"People can actively participate in their communities to bring about change"*.

Due to a renewed focus empowering local communities, there is an increased need for support from charity organisations, such as the Trust, to equip the C&V sector with the appropriate skills. However, the future is uncertain with reduced funding, decreasing donations to charities and increasing demand on services.

**2.5.2 Review of Public Administration**

Under the initial plan for the Review of Public Administration (RPA) the existing 26 District Councils were expected to be reformed into new larger administrative zones based on the amalgamation of current district boundaries, and elections for this new council structure were expected in 2009. The anticipated outcome would involve the adoption of an 11 council model with the existing 26 council system continuing until 2011. Councils have been working together to develop streamlined and more efficient ways of delivering their services to the public and have been expected to assume more responsibility for local economic development, community planning and neighbourhood renewal.

It is important to note that, in May 2010 it emerged that the process of bringing the new authorities into existence will be delayed or may not occur, due to the failure of members of the NI Executive to agree on boundaries for district electoral areas. Consequently, there is a great deal of uncertainty regarding whether reform will take place.

**Strategic Fit**

The Trust aims to support the development of a sustainable infrastructure so that the sector will be capable of meeting future challenges within the context of reduced public finances and the need for collaborative working to bring greater efficiencies. It was envisaged that this challenge would be met through addressing:

*'The need for the development of a productive relationship between local authorities and local communities through providing support, building real partnerships, building organisational and community capacity, engaging individual citizens in a more cohesive, more effective way, to recognise, mobilize and use the assets of their communities to address disadvantage, promote tolerance and social inclusion'*

Activities developed through the Trust could be used to enhance public participation and user empowerment to support the delivery of public administration. By working collaboratively across a range of organisations and sectors can bring greater efficiencies and coherence to the identification of local 'need' and resulting decisions on how best to address need.

### **2.5.1 Draft Concordat**

DSD announced in March 2010 that a draft Concordat for the relationship between Government and the sector is currently being developed in response to the need for more formalised relationships to be formed. This will establish the respective roles for the C&V sector and for Government. It will formally reflect on the importance of this relationship.

This is supported by NI’s Audit Office Report ‘*Creating Effective Partnerships between Government and the Voluntary and Community Sector*’ (2010), which found that the C&V sector “*makes a significant contribution to the achievement of the Executive’s strategic goals and priorities.*”

An effective concordat, governing relations, will highlight the importance of the contribution of the C&V sector and will ensure that the needs of the sector are on the agenda of the NI Executive.

**Strategic Fit**  
 A robust concordat will ensure that the sector is afforded with an opportunity to impact on the delivery of services and inform policy in the future.

The Trust can help to influence change in the sector by collating the key learning that will emerge from interventions developed and engagement with the sector and ensuring that this is communicated at a Government level.

## **2.6 Charity Legislation**

A new Charity Commission for Northern Ireland (CCNI) is now established, marking the beginning of a process to create a coherent system for charity registration and regulation within NI. This will have a significant impact on all C&V organisations as it aims to create a coherent system for charity registration and regulation. It will also increase public confidence in charities, encourage charitable giving and work with the sector to enable charities to improve their operations. This body was created under the Charities Act (NI) 2008. In summary, its purposes are to:

- Establish a compulsory register of all charities operating in Northern Ireland;
- Provide a test to determine which groups are charities;
- Establish new requirements for public collections; and
- Better regulate, supervise and support charities in Northern Ireland.

The change in legislation will impact the C&V sector as charities will be expected to provide evidence of good governance, quality and be accountable to the sector.

**Strategic Fit**  
 The Trust is a registered charity which aims to promote, for the public benefit of the C&V Sector, the efficiency and effectiveness of charities and the effective use of charitable resources in NI.

## 3 SET-UP & EARLY DELIVERY OF TRUST

### 3.1 Introduction

The following section provides a brief overview of the set-up and early delivery of the Trust over the period November 2008 to present.

### 3.2 Building Change Trust ('The Trust')

#### 3.2.1 Inception

The Trust was established in November 2008 by BIG's grant of £10m following the acceptance of a business plan "**Building Capacity for a New Paradigm**". The business plan was developed by the following organisations<sup>3</sup>, collectively known as the 'bid partners'

- Community Foundation for Northern Ireland (CFNI);
- Community Evaluation Northern Ireland (CENI);
- Rural Community Network (RCN);
- Volunteer Now (formerly the Volunteer Development Agency (VDA)); and
- Business in the Community NI.

Section 3.3 (Table 3.4) provides an overview of five distinct projects offered by the bid partners.

The development of this business plan was informed by discussions with the following organisations: Northern Ireland Local Government Association (NILGA), Department for Social Development (DSD), Department of the Environment (DoE), Northern Ireland Housing Executive (NIHE), Northern Ireland Council for Voluntary Action (NICVA), Community Relations Council (CRC), Belfast City Council, the Institute of Governance at Queen's University Belfast, along with a number of potential delivery agents, and consultation with a number of organisations in the C&V sector.

The Trust's mission is "**Investing in social change: Working to make today's challenges tomorrow's opportunities**". The Trust's vision is of a strong, vibrant, independent and relevant C&V sector in NI that:

- Is effective and makes the best possible use of resources to improve the quality of life for the most disadvantaged and marginalised;
- Develops and delivers effective services, advocacy and drives development for positive change based on sound evidence;
- Engages and develops positive relationships with communities, and with other stakeholders and collaborates productively in pursuit of its overall aims;

<sup>3</sup> These projects are in receipt of the first transformative grants from 1 January 2009 until 31 December 2011.

- Inspires, enables and supports more active and involved citizens resulting in the benefit of increased voluntary effort;
- Is open to new ideas and ways of working and continually learns from and improves what it does; and
- Contributes to developing a shared and inclusive NI, which is open and outward looking and encourages the potential of all to be recognised and realised.

The specific objectives of the Trust, as detailed within the Trust Deed<sup>4</sup> made between BIG and the Trust are as follows:

*“To make awards for charitable purposes for:*

- *the development, for the public benefit, of the capacity and skills of the members of socially and economically disadvantaged communities in Northern Ireland in such a way that they are better able to identify, and help meet, their needs and to participate more fully in society;*
- *the promotion, for the public benefit, of the Voluntary Sector, the efficiency and effectiveness of Charities and the effective use of charitable resources in Northern Ireland; and*
- *the advancement, for the public benefit, of citizenship and community development in Northern Ireland;*

*and thereby increase opportunities for volunteering, enhance the identification and support of best practice and good governance in the Voluntary Sector and the development of the skills of persons working in the Voluntary Sector and enable organisations in the Voluntary Sector to work effectively together for the benefit of the community”*

### **3.2.2 Development of Trust**

It is important to note that on 15<sup>th</sup>-16<sup>th</sup> January 2010, the Trust organised a strategy development event to involve input from the Trust Administer, Trustees and Bid Partners following up on an event held April 2009. The two day residential event was facilitated by Interaction Associates to facilitate the process and aimed to develop a strategy and action plan for the Trust which would detail future actions that the Trust will take to continue to develop and refine future strategy.

This output of this event represented a substantive move forward the development of the Trust’s mission, vision and aims. One of the outputs of this meeting was the augmentation of the original business plan’s mission from *“Tomorrow’s Sector, Today”* to *‘Investing in social change: working to make today’s challenges tomorrow’s opportunities’*.

Strategy development also involved brainstorming activities, resulting in ideas being generated for potential programmes. Subsequent to this event, programmes have been developed reflecting inputs from Trustees and Bid Partners. The Trust’s programmes have also been informed by and on-going consultation with representatives in the C&V sector to

<sup>4</sup> The Trust Deed is a legal document governing how the funding must be distributed.

include an event held on 27<sup>th</sup> January 2010 to include 27 individuals from a variety of positions right across C&V sector in NI to discuss collaboration and mergers and their future potential within the sector. This helped to inform the Trust on how best to provide support in response to the issue of mergers, collaboration and partnerships.

The above activities have contributed to the development of the Trust's Strategy 'Investing in Social Change' (2010-2013), which was launched on 7<sup>th</sup> May 2010. The strategy sets out the mission, vision and aims of the Trust and sets out how the Trust aims to be distinctive in the operation of its programmes.

According to the strategy, Trust wants to invest in NI's C&V organisations to achieve positive change and:

- Increase active citizenship and support community development;
- Facilitate new ways of working and effective cooperation;
- Assist the sector to develop and realise an inspiring future vision;
- Contribute to the development of a more independent, confident, risk taking and effective sector; and
- Exercise the best possible stewardship of the time limited Trust Fund, through good governance, inclusive communication and meaningful collaboration.

The Trust's strategy also highlights the following distinct offerings of the Trust Model:

- **“More than grant making:** *We will do more than make grant awards. We will consider non-traditional grant making approaches if appropriate. We will also commission specific projects and in doing so will seek to influence practice and policy in the sector and elsewhere.*
- **Supporting Innovation:** *With our resources we will seek to support organisations in their endeavours to work better, smarter and innovatively. We will work collaboratively with the sector and others to identify new ways of working which may inform the sector into the future.*
- **Learning and Sharing:** *We will make a relatively small number of awards along with commissioned projects and will not invest our resources for continuing existing service delivery. Where we do make grant awards we will seek to develop an enduring relationship with grantees to learn from them and to share that learning. We recognise that the sector has a wealth of skill, knowledge and experience along with willingness and determination for on-going development. We want to harness and contribute to that knowledge and expertise*
- **A Strategic Focus on Change:** *Our resources are substantial but limited. The environment in which community and voluntary organisations are operating is changing. Reduction in availability of funding, changes in local governance, the recession and wider societal changes all impact. We will use our resources to explore, support and enable positive change for sustainable development and delivery within community and voluntary activity.”*

### 3.2.3 *How the Trust will Support the Community & Voluntary Sector*

The £10million awarded to the Trust will be invested over the next 10 years and will involve the following activities:

- Identify community assets and needs;
- Design and target interventions, which will include the following programme themes;
  - Underpinning community development;
  - Promoting volunteering;
  - Supporting partnership;
  - Skills development; and
  - Infrastructure support.
- Build/ strengthen/ utilise capacity and assets; and
- Capture positive change and replicate success.

Three phases of activity can be identified over the life of the Trust, as outlined below:

**Table 3.1**  
Phases of Activity

Phase	Year	Activity
Phase 1	1-2	Establishment, profiling community assets and needs
Phase 2	2-9	Targeted capacity / asset building and transformation
Phase 3	9-10	Consolidating the learning and closure

The Trust will support the sector in three main ways:

1. **Direct Support:** This support will underpin core activity across the focus areas and support pilot initiatives enabling flexible targeted direct intervention as appropriate. The Trust will carry out some pieces of work itself, commission other pieces of work and/ or support pilot initiatives;
2. **Transformative Grants:** the Trust will deliver a transformative grants scheme along with a number of Building Change awards to delivery organisations across NI, who are capable of addressing major transformation issues for example under each of the focus areas or in an integrated manner in order to meet overall objectives; and
3. **A Loan Fund:** A permanent loan fund will be established with an initial £1million one off grant, managed by the Charity Bank and supported by a Regional Investment Readiness Programme. 190 groups will be able to submit a successful loan application and 100+ groups will be supported to deliver their business plan.

### 3.2.4 Governance Arrangements

The Trust is governed by a Trust Deed. There is one Trustee, which is a new company, the Building Change Trust Limited.

A Memorandum of Association was developed to incorporate the new organisation as part of its constitution, it is the document that governs the relationship between the Trust and organisations outside the Trust. Articles of Association also form part of the Trust's governance arrangements, which describes the regulations governing the relationships between shareholders and directors.

#### **Board of Trustees**

As per the Trust Deed, an independent board of directors was appointed in January 2009 to become the 'Trustees' (Table 3.2). Each of the five bid partners nominated a Trustee. It is important to note that these nominees do not represent those organisations on the Trust board. There are also two Directors from outside the five bid partner organisations. This structure resulted in the original bid partners transferring authority and responsibility for the management of the Trust to the Trustees.

The original bid proposal estimated that input of 8-12 days from each of the volunteer nominees would be required and that the Trust would appoint an independent chair (Bill Osborne) for an initial three year term requiring 2-3 days input per month. The Board of Directors will have ultimate responsibility for the decision making process.

Please refer to Appendix I which provides an overview of the experience and expertise of each of the Trustees.

**Table 3.2**  
Trustees

Contact	
Bill Osborne	Chairperson
	<b>Nominated by:</b>
Martin McCarthy	BITC
Maurice Meehan	CENI
Billy Gamble	CFNI
Libby Keys	RCN
Joe McVey	Volunteer Now
Ann McGeeney	Independent
Peter Osborne	BIG

The Trustees met on a monthly basis and are involved in all aspects of the development of the Trust. To reduce the high level of work and input required in the initial set-up of the Trust, Trustees agreed to delegate responsibility and functions to separate sub committees, made up of two-three Directors, to deal with specific issues e.g. governance, finances and award programme development. This is in keeping with guidelines outlined in the Trust Deed and the Memorandum and Articles of Association of the corporate Trustee, which indicates that the Trust Board can establish sub committees which can be invested with the power to take decisions except in relation to investments.

On 6th May 2010, the Trust issued a recruitment call for two additional Directors to support the development of their activities. The aim is to have additional Directors in place by November 2010.

A Service Level Agreement is in place between the Trust and CFNI in respect of administration services to the Trust. This Agreement remains in force until 31<sup>st</sup> December 2019, subject to a 'Good Faith Review' during the fifth year. A Trust Administrator, Nigel McKinney, employed by CFNI, has been working since 2009 on formalising the structures, processes and programme design as well as providing a regular overview of the Trust investment portfolio managed by Citi Quilter.

### **Strategic Programme Panel**

The original business plan indicated that a Strategic Programme Panel would be developed to:

- Advise on the strategic direction of the programme of work;
- To examine issues relating to the legacy of the programme and the sustainability of the work; and
- To consider the progress of the programme.

It was intended that this Strategic Programme Panel would be chaired by a Trust Director and would consist of representation from the bid partnership along with:

- Northern Ireland Local Government Association (NILGA);
- Community Relations Council (CRC);
- Institute of Governance at Queen's University Belfast;
- Northern Ireland Council for Voluntary Action (NICVA);
- Department of Environment (DoE);
- Department for Social Development (DSD);
- Northern Ireland Housing Executive (NIHE); and
- Others as appropriate.

It was also anticipated that further support would be provided by groupings of organisations/agencies within the community/voluntary sector in NI, each chaired by a member of the Strategic Programme Panel, which would convene as required. It was envisaged that there will be: A Community Asset Circle; A Learning/Reflection Circle; and A Skills Development and Education Circle.

It is important to note that at this stage of the Trust's evolution, a Strategic Programme Panel has not been developed. The views of these organisations are being captured through CFNI's the Observatory project (Refer to Section 4.2.1 which has an advisory panel (Refer to Table 4.2, Section 4.2.1)).

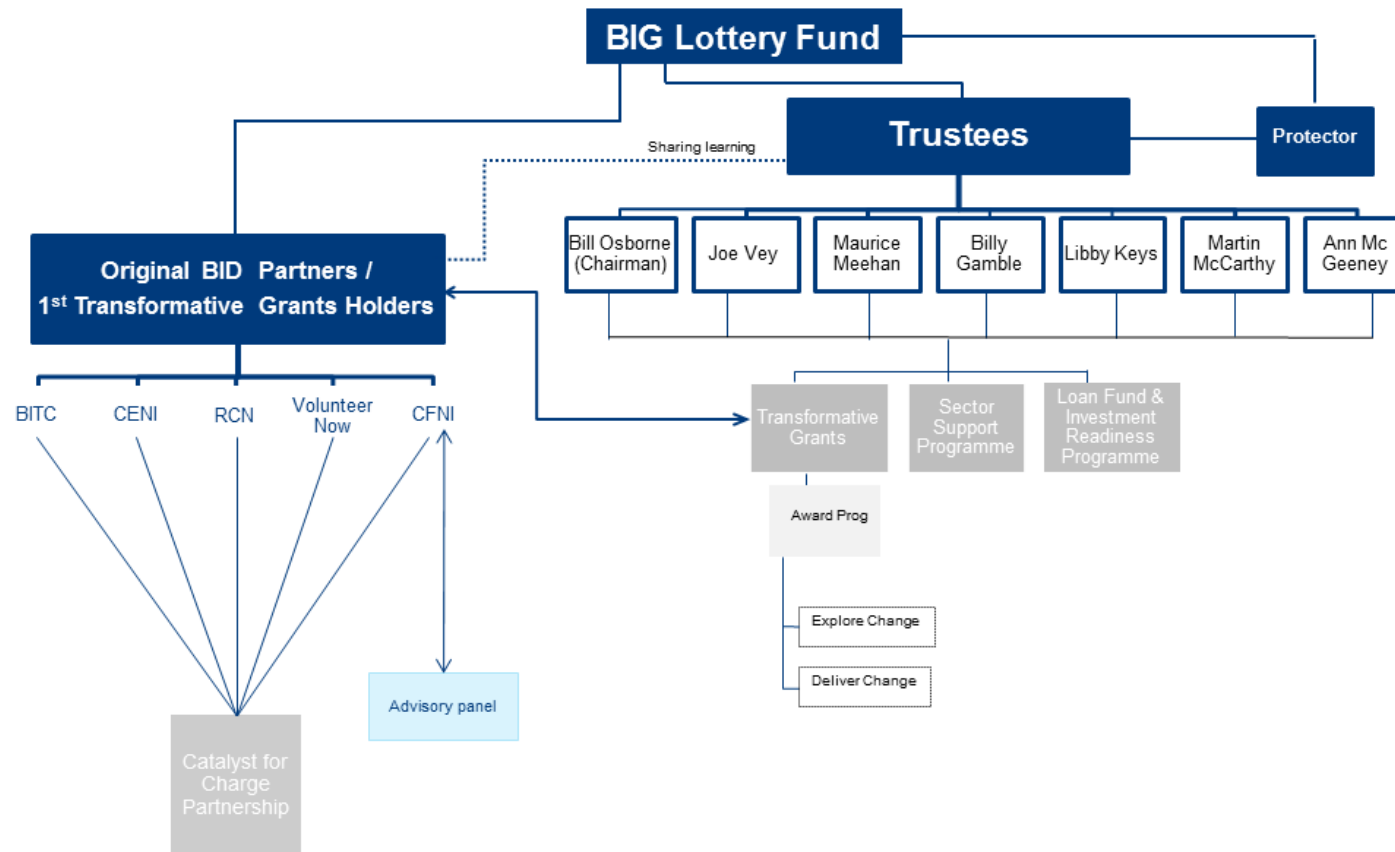
### **3.2.5 Role of Protector**

A Protector (Michael Wilson) has been nominated by BIG who can be regarded as an independent ‘watchdog’, responsible for safeguarding public monies and ensuring the integrity of the administration of the Trust. The key duties of the Protector are as follows:

- Endeavour to build a good working relationship with the Trustee;
- Ensuring that the Trustee administers the Trust properly and to protect the Trust’s property;
- Prepare each year a statement explaining the function of the Protector, and how that function has been exercised. This statement is to be published by the Trustee as part of its annual report;
- Required to give, or withhold, consent or approval to the exercise of certain powers by the Trustee;
- The Protector is acting in a professional capacity and must exercise the powers both reasonably and in a bona fide manner, and with a view to safeguarding the interests of the Trust and the furtherance of its charitable objects.
- The Protector will be open to criticism if he or she acts arbitrarily or for reasons unconnected with the interests of the Trust. He or she should always be able to provide reasons for his or her decisions.
- In dealing with the Trustee, the Protector should aim to achieve a positive and helpful working relationship. There is nothing to prevent the Protector offering informal and helpful advice to the Trustee where it is within their competence to do so even though this may be outside the confines of his or her strict fiduciary duty. However, this is not the Protector’s main duty and the Trustee may choose to disregard any advice.

Diagram 3.1 overleaf provides an illustrative overview of the structure and activities of the Trust.

**Diagram 3.1**  
Overview of Trust Structure



Source: FGS McClure Waters

### 3.2.6 Governance Issues & Actions Taken

Table 3.3 outlines the key issues outlined by the Protector, in his role as overseeing the work of the Corporate Trustee to ensure that it administers the Trust in accordance with the terms of the Trust Deed.

The table also provides an overview of the actions taken by the Trust to address and resolve these issues.

**Table 3.3**  
Key Issues & Actions Taken

Key Issue highlighted by Protector	Description of Key Issues	Action taken by Trust to Address Key Issues
<b>Independence and perception of the Trust</b>	Although the Trust and Corporate Trustee are legally independent of the original 'bid partners', the perception may be that it is not wholly independent. The perception is borne from the fact that the Corporate Trustee does not have its own office and does not directly employ staff, instead a Service Level Agreement with CFNI, one of the bid partners, has been developed.	<p>The Trust have recognised the need to create a stronger identity and enhance this through the following means:</p> <ul style="list-style-type: none"> <li>• Development of a separate website for the Trust</li> <li>• Communication through events, seminars and resources circulated to the sector.</li> <li>• Other practical steps to reinforce independence are being considered i.e. dedicated phone number, e-mail and other contact addresses.</li> </ul>
<b>Directors</b>	<p>The Protector raised a concern that the appointment of some of the directors of the Corporate Trustee could be considered to be in breach of Article 82 of the Articles of Association which gives each of the Bid Partners the right to appoint one director <i>"who shall not be an employee or officer of that body"</i>.</p> <p>The Protector also recommended that the Trust should increase the number of directors and "to expand the talent pool from which the directors might be appointed".</p>	<ul style="list-style-type: none"> <li>• Appointments of the directors in breach of Article 82 have been ratified by the members of the Corporate Trustee, based on the recommendation of the Protector. Therefore ensuring that the directors act independently of the nominating body.</li> <li>• In May 2010, the Trust issued a recruitment call for two additional Directors to support the development of their activities. The aim is to have additional Directors in place by November 2010.</li> </ul>
<b>Operational and Financial Matters</b>	To ensure that the £10m received from BIG was invested appropriately and to ensure that procedures are developed for the internal and external audit of the Trusts financial and management systems.	<ul style="list-style-type: none"> <li>• The Trust Directors appointed Citi Quilter as investment manager. Since the investments were made mid-year a return of 3.5% has been achieved. A target of 5% was set by the bid partners in the original business plan, prior to the economic downturn, therefore the</li> </ul>

Key Issue highlighted by Protector	Description of Key Issues	Action taken by Trust to Address Key Issues
		achievement of 3.5% can be regarded as a success given the current context. <ul style="list-style-type: none"> <li>• The Trust has also ensured that appropriate procedures have been put in place for the internal and external audit of the Trusts financial and management systems.</li> </ul>
<b>Role of Chairman and Administration of the Trust</b>	The Protector also suggested that the position of the Trusts Chairman, which is at present non-executive and unpaid, became a part-time executive and/or remunerated role and that the Chairman might also be the Accounting Officer of the Trust. This is based on the need to ensure that the Trust should operate as effectively as possible and with an operational and communication strategy that is internally effective and externally robust.	<ul style="list-style-type: none"> <li>• This is currently under consideration by the Trust.</li> <li>• The Trust Directors are also reviewing general administration to ensure that processes are as effective as possible.</li> </ul>

The role of the Protector has proven to be beneficial in helping to support the initial and on-going development of the Trust and in ensuring robust governance processes are in line with good practice and meet the requirements of the Trust Deed.

In the Trust’s Annual Report, it is stated that the Protector *“is a role worthy of further consideration by the sector as it has the potential to strengthen governance within voluntary and community organisations”*.

### 3.3 Trust Activities - Progress to Date

The following section provides an overview of the various strands of support provided by the Trust and the progress to date in relation to:

- Transformative Grant Aid to the original bid partners;
- Catalyst for Change partnership;
- Establishment of a permanent loan fund for the sector through Charity Bank;
- Two Awards Programmes which aim to support projects which explore and deliver change; and
- Commissioned programme to support the sector deal with the issue of collaboration, partnership and mergers.

An evaluation of the outcomes and associated impacts of these strands of support will be included in a subsequent draft report, upon the roll-out of activities.

Appendix II provides a summary of the timeline and sequencing of activities from the inception of the Trust to present.

#### 3.3.1 *Transformative Grant Aid to ‘Bid Partners’*

Five awards, totalling c£1.2million, have been allocated to the bid partners as part of the initial transformative awards programme proposed in the business plan “*Building Capacity for a New Paradigm*” to cover the period 1<sup>st</sup> January 2009 until 31<sup>st</sup> December 2011. Each organisation will be concerned with supporting community development and enhancing the skills and capacity of the sector.

The progress of these projects are monitored on a six monthly basis, CENI are in the process of finalising the internal formative evaluation report based on monitoring information, which will document the key achievements and progress with regard to each area of activity outline below. This will report will be published in **January 2011**, at which point an independent critique of achievements will be conducted on behalf of BIG.

**Table 3.4**  
Bid Partner Projects

Name	Location	Amount	Overview of Activities
BITC	Belfast	£172,000	BITC will be responsible for the following activities, collectively known as the ‘Tomorrow Today’ Programme, consisting of three interconnected strands i.e.: <ul style="list-style-type: none"> <li>• <b>Strand 1: Establish Supportive Private Sector Structure</b> – which would work with the community sector providing: Networks for collaborative action; New pathways to ensure partnership approaches/working; Consideration of a new tool to capture, measure and benchmark the activity.</li> <li>• <b>Strand 2: Mobilisation of Networks</b> – involving the following; establishing a new employers supported volunteering campaign working in partnership with Volunteer Now and local volunteer centres; development</li> </ul>

Name	Location	Amount	Overview of Activities
			<p>of a new partnership/talent academy that would include all sectors; development of a new support programme for social economy organisations; embedding of strategic alliances and rolling out of new style cross-sectoral working.</p> <ul style="list-style-type: none"> <li>• <b>Strand 3: Seeing is Believing</b> – embedding strategic alliances and rolling out a new style of cross-sectoral working. This was to involve: Holding as Best Practice road show; Harnessing the learning programme; and Holding a ‘What if’ conference.</li> </ul>
CENI	Belfast	£331,010	<p>CENI will be responsible for the following activities:</p> <ul style="list-style-type: none"> <li>• <b>Social Assets</b> – Provide analysis, dissemination and update of the social assets data base.</li> <li>• <b>Needs &amp; Support Assessment</b> – CENI launched a high profile report ‘<i>Measuring Up</i>’ - A Review of Evaluation Practice in the Voluntary and Community Sector (Please refer to Section 4.2.2).</li> <li>• <b>Training</b> – Develop and deliver an integrated package of evaluation training. This has involved research and development and training seminars relating to the social assets model and developing the Catalyst for Change partnership (Please refer to Section 3.3.2)</li> <li>• <b>Formative Evaluation</b> – To provide a formative evaluation of the BCT Programme (including the Catalyst for Change programme) and to capture positive change and replicate success.</li> </ul>
CFNI	Belfast	£251,651	<p>CFNI will be responsible for the following activities:</p> <ul style="list-style-type: none"> <li>• <b>Statutory Sector Engagement</b> – CFNI has established the post of ‘Observatory Facilitator’ to engage with key stakeholders in the public and private sectors, academia and with political representatives whose work directly impacts on the C&amp;V sector. The purpose of these meetings has been to introduce the work of the Observatory within CFNI and its relationship to the work of Trust (Please refer to Section 4.2.1).</li> <li>• <b>Community and Voluntary Sector Engagement</b> – The Observatory, together with the Trust Administrator, has also carried out a number of consultation events with community and voluntary sector organisations to begin a dialogue that will; Outline the challenges and uncover opportunities for continued and effective community development; and Ensure that the sector has a channel for communication and participation in the work of the Trust.</li> <li>• <b>Informing Strategy</b> – Findings from consultations throughout the sector have been submitted to the Trustees in order to: Identify best practice and procedures for transformative action in civic engagement and community development; Explore new models of community engagement, governance and service delivery; Influencing policy development for continued support and development.</li> <li>• <b>Facilitation and Support</b> – The Observatory has also delivered information workshops to community development practitioners on the value and practice of community development, civic participation and community engagement. It has also sponsored 5 bursaries for training support on organisational transformation with the Institute for Cultural Affairs.</li> </ul>

Name	Location	Amount	Overview of Activities
Volunteer Now	Belfast	£293,980	<p>Volunteer Now will be responsible for the following activities, collectively known as the 'transformation of volunteering infrastructure':</p> <ul style="list-style-type: none"> <li>• <b>Utilisation of CENI's Social Assets Mapping</b> – identify areas where volunteer involvement is low; assess the range of opportunities available; work with local volunteer centres to assist organisations to develop and promote opportunities, and provide training to build volunteer management skills.</li> <li>• <b>Time Bank Projects</b> – In partnership with 4 volunteer centres to develop and support 4 Time Bank pilot projects. Enhance the capacity of volunteers in the Time Bank areas through training and accreditation, and work with schools to develop and promote volunteering in Time Bank areas</li> <li>• <b>Investing in Volunteers</b> – Support organisations to complete and attain the Investing in Volunteers organisational standard</li> <li>• <b>Volunteer Now website</b> – Develop and promote the www.volunteerNow.org website to link potential volunteers with opportunities.</li> <li>• <b>Effective Management of Volunteers Programme</b> – Build the capacity and competence of volunteer managers through delivery of the Queens University accredited Effective Management of Volunteers Programme</li> <li>• <b>Respond to Review of Community Support Plans</b> – and work with local authorities and volunteer centres to enhance support for volunteering</li> <li>• <b>Review of the DIY Committee Guide</b> – a key resource for governance information including implementation of the new charities legislation</li> <li>• <b>Impact Assessment</b> – Volunteer Now staff members have received training in using the Impact Assessment Toolkit for volunteer involvement from the Institute for Volunteering Research. This will enable the organisation to roll out this work across a range of organisations/groups.</li> </ul>
RCN	Cookstown	£144,100	<p>RCN will be responsible for the following activities:</p> <ul style="list-style-type: none"> <li>• <b>Strategic Framework for Community Development (SFCD)</b> – this will involve the creation and development of a regional advisory panel.</li> <li>• <b>Promoting Excellence</b> – this will involve promoting community development practice which would include the development of the National Occupational Standards (NOS) in community development at UK and Republic of Ireland levels. This would provide both for paid and unpaid practitioners developing a career path in community development with recognition of the value of this work that would be transferable to other sectors.</li> <li>• <b>Rural Community Development and Networking Infrastructure</b> – this would be developed to take maximum opportunities offered by new local governance structures, powers and processes.</li> </ul>
		<b>£1,192,741</b>	

---

### **3.3.2 Catalyst for Change Partnership**

In addition to the above activities, the original five bid partners have invested a lot of time and effort in the creation and development of the Catalyst for Change initiative, in response to the need to work collectively rather than working in isolation on their respective projects. This initiative involves the five partner organisations working together over the period 2009-11 and aims to provide a collaborative approach to producing more integrated models of working.

The lead organisation for the partnership is based on a six-monthly rotational basis, where each bid partner has an equal responsibility.

Based on resources available, the Catalyst for Change partnership targeted two pilot sub-areas within the district council areas of Omagh and Fermanagh and North Down and Ards. These areas included:

- Enniskillen (urban, area with a rural hinterland); and
- Upper Ards (rural area with several villages and small towns).

BITC is the Lead Area co-ordinator in Enniskillen and Volunteer Now is the lead for Upper Ards.

The selection of the two pilot areas was based on analysis of CENI's Social Assets model. This model mapped the levels of Bonding, Bridging and Linking Social Capital across each district council area as well as the levels of community organisation and capability. Consequently, the Trust will identify what the community has to offer and then utilising this to take forward positive change, rather than a traditional grants programme.

Several meetings have been conducted in the two pilot areas in order to provide key stakeholders with information relating to the expertise and support which can be provided by each bid partner. Subsequent to this key stakeholders in these targeted communities outlined their needs, the aim of which was to map what the bid partners could offer against these stipulated needs. This process helped to enhance the level of partnership working on various levels to include partnership across the bid partners and between and within the local community, whilst also providing the community with ownership and buy-in to the interventions developed.

---

### **3.3.3      *Loan Fund – Charity Bank***

The original business plan developed by the Bid Partners sets out the potential to establish a £2m permanent loan fund for the NI C&V sector through the Trust. The aim is to support organisations to adapt to changing environment from short-term funding and dependency on grants to longer-term sustainability focused on social investment and a focus on output/impacts as a result of funding. It is envisaged that the permanent loan fund is to deliver a legacy impact from the Trust.

It is important to note that the allocation of the permanent loan fund, to be managed by Charity Bank<sup>5</sup>, has been delayed as concerns were raised that this format would mean that loans would be available not only to NI C&V sector representatives but also to those in the UK. The Trustees felt that by pursuing this process, they would be acting in contravention of the Deed which placed emphasis on benefits for NI only.

The Trust Administrator has invested a lot of time and effort liaising between the Trustees and Charity Bank representatives, which has helped in the decision making process regarding this investment. At its meeting on 26<sup>th</sup> March 2010 the Board agreed allocate £1m (to be paid in two instalments, the first payment will be allocated in November 2010) and an additional £1m to be ring fenced for further social finance, subject to satisfactory performance.

It was initially proposed that the Loan Fund will be supported by a ‘Regional Investment Readiness Programme’ for the first five years of its operations. Charity Bank is committed to the delivery of this Programme in association with the University of Ulster across the whole of NI and will include mentoring, training and technical support on building community assets, organisational and cultural change, business planning, managing people and finances, marketing and focusing on community and local needs. The programme will result in an accredited Advanced Diploma, which aims to strengthen the entrepreneurial capacity, resilience and diversity of the C&V sector.

It has been decided to separate the accredited investment readiness programme at this stage until detail is provided regarding its implementation, to avoid further delays the first instalment to Charity Bank was paid at the end of November 2010. The Trust in collaboration with Charity Bank have organised a community assets seminar for 14<sup>th</sup> December 2010 in Belfast.

---

<sup>5</sup> Charity Bank aims “to help charitable organisations transform people’s lives – and to do this by harnessing the nation’s wealth and using it to create a social return”. This aim can be achieved through providing financial support and guidance to charities, social enterprises and community organisations, therefore helping communities to participate in society in meaningful and effective ways.

### 3.3.4 Award Programmes

Following consultation with the C&V sector, the Trust launched two new awards programmes, Exploring Change and Deliver Change on 7<sup>th</sup> May 2010 to help the NI C&V sector deal with changing times, to include the impact of the recession.

The Trust is interested in projects that are innovative and have the potential for learning within the organisation and to help influence the wider sector.

The awards will not be traditional grants in that the Trust will require recipients to spend on average 10 days over the life of the award to work with the Trust to share learning from their work with it and the rest of the C&V sector. Through this the Trust hopes to identify projects which demonstrate to the rest of the sector how change can take place and contribute to the on-going development of the sector.

Appendix III and Appendix IV provide an overview of the projects proposed to include the need for activities, outcomes, innovations and learning and sustainability, based on a review of applications.

#### **Exploring Change**

Exploring Change will make 60 awards (4 phases as per Table 3.5) of up to £20,000 (i.e. £1.2m) for exploratory work within the sector. Each award will enable recipients to complete a project exploring options for change and future sustainability in the context of making a contribution to one or more of the Trust’s aims i.e.

- Increase active citizenship and support community development;
- Develop new ways of working and effective cooperation;
- Enable the sector to develop and realise an inspiring future vision; and
- Help create a more independent, confident, risk taking and effective sector.

**Table 3.5**  
 Phasing of Explore Change Awards

Explore Change						
Phase	Application Process		No. of Awards	Project Duration		
	Opening	Closing		Start	Complete	No. of months
1	May 2010	June 2010	15	November 2010	March 2012	17 months
2	November 2010	January 2011	15	May 2011	October 2012	18 months
3	May 2011	June 2011	15	October 2011	March 2013	18 months
4	November 2010	January 2012	15	May 2012	October 2013	18 months

**Exploring Change**

Phase 1 of the Exploring Change, which will make 15 awards, has received 34 applications (Table 3.6). Appendix III provides an overview of each of the explore change programme applicants proposed projects. Six applications have already been considered and rejected by the Trustee as either not meeting the eligibility criteria or not being of sufficiently high quality at this stage. There is no barrier to these organisations reapplying to Phase 2 which will close for applications on 17<sup>th</sup> January 2011.

**Table 3.6**  
 Explore Change Applicants

Organisation name	Amount requested
1. Action Mental Health	£10,650
2. Aisling Centre	£3,766
3. Aware Defeat Depression	£20,000
4. Cedar Foundation	£19,000
5. CIPFA (Community on Board)	£12,668
6. CIPFA (Recognising Standards of Governance)	£19,455
7. Chief Officers Third Sector (CO3)	£14,000
8. Community Arts Forum	£19,440
9. Community Foundation for NI (CFNI)	£19,000
10. Forthspring Inter Community Group	£19,685
11. Intercomm	£20,000
12. Liberty Consortium	£20,000
13. Mulholland After Care Services (MACS)	£19,900
14. New Life Counselling	£20,000
15. New Lodge Arts	£18,150
16. NI Environment Link	£19,500
17. North West Centre for Learning and Development	£20,000
18. North West Lifelong Learning Association (NWLLA)	£20,000
19. Northern Ireland Rural Women's Network (NIRWN)	£19,958
20. Old Library Trust	£19,550
21. Opportunity Youth	£20,000
22. Royal Mencap Society	£20,000
23. Springfield Charitable Association	£20,000
24. The Village Garden Broughshane	£20,000
25. Ulster Community Investment Trust (UCIT)	£18,000
26. Ulster Cancer Foundation	£18,694
27. Volunteer Now	£19,300
28. YouthNet	£12,174
<b>Total Funding requested by applicants under consideration</b>	<b>£502,890</b>
<b>Rejected</b>	
29. Ballymagroarty and Hazelbank Community Partnership	£19,600
30. Big Telly Theatre	£20,000
31. CIPFA ( bank employee training)	£16,400
32. Dance United	£20,000
33. Greenlight gateway	£20,000
34. Voluntary Arts Ireland	£20,000
<b>Total Funding requested by applicants rejected</b>	<b>£116,000</b>
<b>Overall Total</b>	<b>£618,890</b>

**Deliver Change**

Deliver Change will make 20 awards (3 phases as per Table 3.7) of around £50,000 (i.e. £1m) for work to implement change. Deliver Change awards are expected to be more substantial projects where initial and exploratory work on change has been completed and clear change actions have been identified and can be implemented. The awards will enable organisations to start to implement change for future sustainability in the context of making a contribution to one or more of the Trust proposed outcomes.

**Table 3.7**  
 Phasing of Deliver Change Awards

Deliver Change						
Phase	Application Process		No. of Awards	Project Duration		
	Opening	Closing		Start	Complete	No. of months
1	May 2010	June 2010	5	November 2010	September 2012	23 months
2	May 2010	September 2010	5	January 2011	December 2012	24 months
3	April 2013	May 2013	10	September 2013	August 2015	24 months

Phase 2 of the Deliver Change is also oversubscribed, which will make 5 awards, received 16 applications representing organisations across NI. Appendix III provides an overview of each of the deliver change programme applicants proposed projects.

**Table 3.8**  
 Deliver Change Applicants

Organisation name	Amount requested
1. Age NI	£50,000
2. Ashton centre	£58,200
3. Autism Initiatives NI	£46,855
4. Coleraine Rural and Urban Network	£49,966
5. Foyle Multicultural Forum	£50,000
6. Gingerbread	£49,976
7. Habitat for Humanity	£49,220
8. Holywell Trust	£50,000
9. New Life Counselling	£50,000
10. NI Youth Forum	£50,000
11. North West Centre for Learning and Development	£50,000
12. Reminiscence Network NI	£49,572
13. Stepping Stones	£34,459
14. The Villages Together	£49,820
15. Voice of Young People in Care (VOYPIC)	£59,964
16. Volunteer Now	£50,500
<b>Total Funding requested by applicants under consideration</b>	<b>£798,532</b>

The Trust is now commencing the assessment process with the intention of making decisions and issuing contracts to successful applicants in November 2010. NB. Since the submission of this report, the Trust announced the first 23 awards on 25<sup>th</sup> November from the Exploring and Deliver Change Award Programmes.

### **3.3.5 Sector Support Programme**

The Trust facilitated a seminar in January 2010 to stimulate discussion regarding collaboration within the C&V sector. This seminar was hosted by the Trust, NICVA and 'Chief Officers Third Sector ('CO3') who brought together 27 representatives of the sector to enable them to share their experience and knowledge of mergers and collaboration along with the challenges and explore methods that will enable the sector to respond effectively to the issue.

As a result of this seminar, the Trust invited tenders for the delivery of the 'Mergers and Collaboration' Support Programme, initially for 3 years, to support the sector to deal with the issue of collaboration, partnership and mergers. The closing date for tenders was 27<sup>th</sup> August 2010, appointment of a programme delivery agent is expected by November 2010.

The Terms of Reference, outlined in the tender invitation, highlighted that this programme will assist organisations at all levels within the sector:

- To contribute to the debate on the role of collaboration, partnerships and mergers;
- To provide practical support to assist organisations to explore the issues and where the path is chosen to provide an integrated programme of support to progress plans for partnership, collaboration and mergers;
- To contribute to learning within the sector; and
- To create a legacy of information, knowledge, skills and experience for the future benefit of the sector in respect of the issue

The aim is to develop and deliver a NI wide programme that will:

- Critically examine and encourage and host debate within the sector and with others on the appropriate use of partnerships, increased collaboration and mergers within the overall aim of adding to the sustainability of community needs being identified and met into the future;
- Provide access to an appropriate and comprehensive range of mentoring, training, support, information, advice (including technical/legal advice) for organisations seeking to explore and/or progress partnerships, increased collaboration and mergers;
- Develop and make available in a range of formats, best practice material and guidance based on case studies and toolkits to support organisations explore and implement collaborative working;
- Develop and deliver study visits and seminars to support the programme • Undertake research into the issue to both inform programme development and with the aim of contributing to knowledge of the issue within and outside the sector;
- Establish, coordinate and manage a programme advisory group to support on-going development and delivery of the programme; and
- Identify and deliver other actions that can contribute to delivering the objectives of the programme.

NB. Since the submission of this report, the Trust announced that the tender will be awarded to NICVA & CO3 at the end of November 2010/start of December.

## 3.4 Monitoring & Evaluation

The following provides an overview of the current monitoring and evaluation which is being carried out by the Trust.

### 3.4.1 *Trust Monitoring & Evaluation*

#### **Internal**

The Trust Administrator prepares quarterly reports for the Trustees and BIG regarding governance and operational updates.

As one of the bid partners, it is CENI's responsibility to conduct a formative, internal evaluation of the individual bid partner projects and the Catalyst for Change collaborative project. This evaluation includes a review of the original bid partners' individual and collaborative projects. This will cover the period 1 January 2009 until 31 December 2011.

CENI's evaluation report will be published in November 2010, which will provide an update with regard to achievements to date. To feed into CENI's evaluation process, it is the responsibility of each bid partner to provide CENI with robust evidence of progress on a six monthly basis.

It is important to note that CENI has re-developed evaluation and monitoring tools in order to ensure consistency of reporting across each of the bid partner projects. Furthermore, the evaluation framework has been re-designed to take into consideration of the Catalyst for Change partnership engagement.

This evaluation framework summarises how the activities are contributing to Trust Programme themes i.e. Underpinning community development, promoting volunteering, supporting partnership, skills development; and infrastructure support and the Trusts Strategic Objectives i.e. identify community assets and needs, design and target interventions, build/strengthen/utilise capacity and assets; and capture positive change and replicate success.

In addition to the above, the Trust Administrator conducts monitoring visits/meetings with each bid partner every six months.

The loan fund and sector support programme and will be monitored upon award of contracts expected in November 2010. In addition, monitoring of the award programme will commence upon issuing of the letter of offer to successful applicants in November 2010.

#### **External**

In November 2009, the Trust commissioned an independent external evaluation from Hall Aitken and Full Circle Management, to review the operations of the Trust to include functioning of structures, systems and procedures over the first three years, verify its achievements and make recommendations for its development.

The final Year 1 evaluation report from Hall Aitken was received and circulated initially to Trustee board and thereafter bid partners by 30 April 2010.

---

## 4 ENGAGEMENT WITH THE C&V SECTOR

### 4.1 Introduction

The extent to which the Trust model has effectively engaged with the C&V sector is presented in this section. Consideration is given to the following channels of communication:

- CFNI’s Observatory project through the post of the Observatory Facilitator;
- Programme Development;
  - Sector Information/Dialogue Sessions;
  - Award Programme Engagement;
  - Catalyst for Change Engagement; and
  - Sector Support Programme
- Communication Channels (e.g. Trust’s website and publications)

### 4.2 Sector Consultation

#### 4.2.1 *Trust & CFNI’s Observatory Project*

The Trust in association with CFNI’s Observatory project (Section 3.3.1, Table 3.4) has been engaged in consultations with the following organisations, aimed at introducing the work of the Trust and initiating dialogue within the sector to gain a better understanding of the issues impacting on C&V organisation and disadvantaged communities:

- Local Authorities and Government Departments i.e.
  - 17 local councils (Antrim, Ards, Armagh, Ballymena, Belfast, Banbridge, Craigavon, Derry, Down, Dungannon (Cookstown & Magherafelt), Fermanagh, Lisburn, Newtownabbey, Omagh, and Strabane);
  - NI Local Government Association (NILGA);
  - Local Government Policy Division;
  - Department of Social Development (DSD); and
  - Department of Education (DE).
- Health related organisations i.e.
  - Public Health Agency;
  - Patient Client Council; and
  - Health Trusts (including Belfast, Northern, Southern and the South Eastern Health Trust).

In addition to the above, the Trust launched a series of community consultation events throughout 2009 (as per Table 4.1), which aimed to engage with a range of organisations across the sector to discuss key issues and help to inform how the Trust’s resources will be used to support the sector. Over 100 different C&V organisations were present at these consultation events. Please refer to Appendix V for a list of these C&V organisations and Appendix VI which provides an overview of the key areas of discussion at each consultation event.

The Observatory Facilitator has drafted a report based on discussions with the statutory sector and consultation with the C&V sector, which has been used to inform the development of the Trust's programme of support.

**Table 4.1**  
 Engagement with the C&V Sector (2009)

Area/Theme	Date 2009	Focus of Event/Seminar	No. of Attendees	No. of Org.
<b>2009 Events</b>				
TBC	3rd July	<i>"What needs to be done to build a better community and voluntary sector?"</i>	21	20
North West	24th Sept	<i>"What must my organisation do to ensure our community needs are better met now and into the future?"</i>	17	11
Belfast	29th Sept		9	8
Fermanagh	30th Sept		18	14
Mid Ulster	1 <sup>st</sup> Oct		16	12
Regional Women's Sector	6 <sup>th</sup> Oct		16	13
North Antrim	7th Oct		TBC	TBC
Coleraine & District	14th Oct		10	9
North Belfast	23 <sup>rd</sup> Oct		25	21
Omagh	28th Oct		TBC	TBC
East Belfast	4 <sup>th</sup> Nov		18	12
East Belfast	4 <sup>th</sup> Nov		TBC	TBC

The Observatory Facilitator has also formed an Advisory Panel of key stakeholders from academia, the public and the C&V sector. The aim of this panel is to help support the role of the Observatory by providing advice to address issues emerging from consultation in relation to change and transformation and how stakeholders might respond. The Advisory Panel would benefit from the inclusion of representatives from the private sector.

**Table 4.2**  
 Advisory Panel Members

Organisation	Contact
<i>BIG, Trust, BID partners &amp; Trust associate representatives</i>	
BIG	Joanne McDowell
BIG	Norrie Breslin
CFNI	Kat Healy
CFNI	Avila Kilmurray
CFNI	Nigel McKinney
CFNI	Monina O'Prey
CENI	Gladys Swanton
Volunteer Development Agency	Denise Hayward
Volunteer Now	Christine Irvine
BITC	Claire McAteer
RCN	Michael Hughes
Charity Bank	Niamh Goggin
<i>Other C&amp;V sector representatives</i>	
Belfast Heath & Social Care Trust	Sandra McCarry
Community Development & Health Network	Joanne Morgan
Community Network Craigavon	John McGuinness
Community Places	Annie Clarke
DSD Voluntary & Community Unit	Jack O'Connor

Organisation	Contact
Department of Agriculture and Rural Development (DARD)	Zita Murphy
East Down Rural Community Network (EDRCN)	Frances
Environmental Planning Queen's University	Dr Brendan Murtagh
Fermanagh Trust	Lauri McCusker
Institute of Governance, Queen's University	Dr Una Lynch
Landmark East	Maurice Kinkead
NI Local Government Association (NILGA)	Helen Richmond
North West Community Network	Colin Devine
Pobal (RoI)	Anne Molloy
St Mary's University College	Gerard McCann

#### **4.2.2 Programme Development**

Engagement with the sector continued in 2010, to include the following events/seminars, which have helped to further inform the development of the Trusts programmes:

- Sector Information/Dialogue Sessions;
- Award Programme; and
- Catalyst for Change – pilot area consultation

##### **Sector Information Sessions**

- On **27th January 2010**, the Trust, NICVA and 'Chief Officers Third Sector ('CO3') brought together 27 representatives of the sector to discuss mergers and collaboration and their future potential in the sector. As a result of this engagement, the Trust agreed to tender the 'Mergers and Collaboration' Support Programme (2010-2013) (Please refer to Section 3.3.5 for further information on this programme).
- On **4th-5th February 2010**, the CO3 Leadership Voyage Conference was held. The conference aimed to give leaders in NI's third sector space to consider future trends and developments, skills to manage the forthcoming change and inspiration and passion to lead their organisation through change.
- On **17th February 2010**, Formal launch of CENI's report 'Measuring Up' - A Review of Evaluation Practice in the C&V Sector. The research, which was funded by DSD and by the Trust, was carried out between June-September 2009 and set out to review the current state of evaluation practice and to inform debate on how this needs to be developed in a very challenging political and economic environment. This research included; engagement with representatives from a range of funders including government departments, statutory agencies and non-governmental/ independent funding bodies; and a postal survey to a sample of 400 C&V sector organisations throughout NI (158 responses received, representing a return rate of almost 40%). The report provided an assessment of current experience and practice in monitoring and evaluation in relation to meeting future needs. The conclusions highlighted the need for investment to develop more effective approaches to outcomes measurement and the importance of building the evaluation capacity of the sector and its funders. The report has been widely disseminated across the sector and Government and provides a timely account of the need for a more strategic approach to evaluation in the current economic climate.

- On **26th March 2010**, a conference entitled ‘Working Towards a Way Forward’ was facilitated by the Trust’s Chairperson to over 100 delegates regarding the progress to date and plans for the future.

#### **Award Programme Events/Information Sessions**

- On **7th May 2010**, the Trust launched Phase 1 Exploring Change and Deliver Change Award Programmes (Phase 1 closed for applications on 11th June). Four information sessions were held i.e.
  - Session 1: Belfast, 7<sup>th</sup> May
  - Session 2: Derry, 10<sup>th</sup> May
  - Session 3: Newry, 12<sup>th</sup> May
  - Session 4: Moygashel, 17<sup>th</sup> May
- On **3rd September 2010**, Deliver Change Phase 2 Information Session was hosted by the Trust (Phase 2 closed for applications on 17th September)
- Phase 2 of the Trust’s Exploring Change Awards Programme will close for applications on Friday 7 January 2011. Four information sessions have been organised for potential programme applicants i.e.
  - Session 1: Newry, 3<sup>rd</sup> November
  - Session 2: Dungannon, 3<sup>rd</sup> November
  - Session 3: Belfast, 5<sup>th</sup> November
  - Session 4: Derry, 12<sup>th</sup> November

#### **Catalyst for Change – Consultation Events**

As stated in Section 3.2.2, the Catalyst for Change partnership initiative involves targeting interventions and support to two pilot areas i.e. Enniskillen and Upper Ards. Meetings and focus groups have been carried out with key stakeholders in these areas in order to provide them with information relating to the expertise and support which can be provided by each bid partner. Subsequent to this key stakeholders in these targeted communities outlined their needs, the aim of which was to map what the partners could offer against these stipulated needs.

Engagement with the private sector is also evident with BITC consulting with Business Leadership Networks across NI (i.e. Belfast, North Eastern and North Western) which aimed to profile the quality of existing relationships between C&V sector and opportunities for future collaboration. A pilot Business Leadership Network has also been created in Enniskillen.

### 4.2.3 *Communication Channels*

The Trust has a dedicated Communications Officer, who is responsible for developing a communication strategy to include actions to promote the Trust throughout the C&V sector and beyond.

One of the key channels of communication and link with the C&V sector stakeholders is via the Trust’s official website, which was launched on 25<sup>th</sup> March 2010. The website is simple and easy to navigate. However, improvements can be identified with regard to the format and information presented, as summarised in Table 4.3 in order to improve the level of effectiveness.

The website can be regarded as the first port of call for the C&V sector and wider audience (government, policy makers, private sector), therefore messages presented should be relevant and up-to-date. Prominence should be given to the Trust’s ‘Investing in Social Change’ Strategy 2010-2013 and Annual Report & Accounts for 2009. Information regarding the bid partner projects should be updated and reference should be made to the Catalyst for Change Partnership. The website should be more sophisticated and in keeping with the concept of being innovative and inspiring the sector to engage in strategic change.

**Table 4.3**  
 Trust Website Content & Suggested Improvements

Website Area	Description	Area for improvement
Home / About Us / Contact Us	<ul style="list-style-type: none"> <li>• Overview of Trust Inception</li> <li>• Pen-Pic of Board Directors</li> <li>• Snapshot of latest news and projects</li> <li>• Contact details of the Trust</li> </ul>	<ul style="list-style-type: none"> <li>• Provide key information on aims and objectives of the Trust and areas of support.</li> <li>• Provide a link to the Trust’s Strategy and Annual Accounts on homepage.</li> <li>• Under the section ‘Latest Projects’ provide up-to-date information regarding progress of each of the individual bid partner projects as well as the collective Catalyst for Change partnership initiative.</li> </ul>
Get Involved	<ul style="list-style-type: none"> <li>• This page provides contact details for the Trust. No other information is provided.</li> </ul>	<ul style="list-style-type: none"> <li>• Greater clarity surrounding this section is needed. For example, is this section aimed at encouraging individuals to become involved at a Trust or Trustee level or is it aimed at engaging with the C&amp;V sector.</li> <li>• It may be possible to merge this section with the information provided under the ‘Events’ section, which provide a mechanism for the sector to get involved.</li> </ul>
News	<ul style="list-style-type: none"> <li>• Provides updates relating to C&amp;V sector consultation events, information sessions, award programme details and the appointment of new Directors to the Trust.</li> <li>• The latest news alert was posted on 25th October 2010 relating to information sessions scheduled for the Explore Change Phase 2 Programme. The news alert previous to this was on 26th July 2010. In general, news alerts have been posted on a monthly basis.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure that updates are regularly posted to engage the sector.</li> </ul>
Frequently Asked Questions	<ul style="list-style-type: none"> <li>• This section provides information on:               <ul style="list-style-type: none"> <li>– Background information relating to formation of the Trust;</li> <li>– Key aims and activities of the Trust;</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• This section could be merged with ‘About Us’ section.</li> </ul>

Website Area	Description	Area for improvement
	<ul style="list-style-type: none"> <li>- Availability of the Trust to support the C&amp;V sector.</li> </ul>	
Resources	<ul style="list-style-type: none"> <li>• Resources are categorised as follows:               <ul style="list-style-type: none"> <li>- Director Minutes,</li> <li>- Grant Management,</li> <li>- Presentations,</li> <li>- Programmes,</li> <li>- Recruitment, and</li> <li>- Tenders.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Trust Strategy and Business Plan are not in a prominent position. As previously noted, links to the above could be provided on the homepage.</li> <li>• Under each category, files could be grouped as hyperlinks under key headings e.g. Consultation Events, Board Minutes, Reports and Presentations and Tender Adverts, rather than an extensive list of resources.</li> </ul>
Members Area	<ul style="list-style-type: none"> <li>• This section is a secure area for Trustee members. An email and corresponding password are required.</li> </ul>	
Projects	<ul style="list-style-type: none"> <li>• This section provides a quick snapshot of the bid partner projects highlighting:               <ul style="list-style-type: none"> <li>- Name of the Organisation</li> <li>- Location;</li> <li>- Amount allocated to the project</li> <li>- Contact email address</li> </ul> </li> <li>• A separate attachment is also provided which outlines each organisations project. However, attachments are not up-to-date.</li> </ul>	<ul style="list-style-type: none"> <li>• Update attachments relating to bid partner projects on a regular basis.</li> <li>• Provide information on the Catalyst for Change Partnership</li> </ul>
Links	<ul style="list-style-type: none"> <li>• Links to each of the five bid partner websites and links for:               <ul style="list-style-type: none"> <li>- BIG;</li> <li>- NICVA;</li> <li>- Community NI;</li> <li>- DSD;</li> <li>- DIY Committee Guide, and</li> <li>- Neighbourhood Statistics NI.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Provided a summary of the organisations aims / objectives and rational for inclusion</li> </ul>
Events	<ul style="list-style-type: none"> <li>• Events are categorised as follows:               <ul style="list-style-type: none"> <li>- <b>C&amp;V events</b> – This subsection currently provides information on November information sessions; and</li> <li>- <b>Board Events</b> – This sub section is currently blank.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Continue to provide information on upcoming information sessions.</li> <li>• Populate Board Events section with forthcoming meetings.</li> </ul>

In addition to the Trust website, a review of the bid partner websites was undertaken to assess the extent to which consistent messages of the composite Trust activities were being communicated to the C&V sector.

The table below provides an overview of the information provided by each of the bid partner websites. As the review suggests, the information regarding the Trust and bid partner projects is limited.

Furthermore, one of the conditions of accepting assistance from BIG and the Trust is that the beneficiary logo (Diagram 4.1) is used to acknowledge support. (The beneficiary logo is made up of BIG's logo locked to the Building Change Trust's logo, to show that they managed the funding of the award), yet only two of the bid partners contain this logo.

**Diagram 4.1**  
Beneficiary Logo



To enhance the effectiveness of communication regarding the Trust and to ensure that consistent brand awareness is raised, it is important that the Trust's website and associated bid partner's website contain relevant, up-to-date information in a standard format utilising the combined BIG and Trust logo.

Furthermore, all grant recipients must acknowledge the support of BIG when producing any form of promotional or publicity material, including press releases, leaflets, posters, brochures and annual reports.

**Table 4.4**  
Bid Partner Websites – References to Trust Activities

Bid Partner	Reference to Trust in bid partner websites
BITC	<ul style="list-style-type: none"> <li>One webpage overview of the Trust outlining:               <ul style="list-style-type: none"> <li>– Launch of the Trust;</li> <li>– How BITC supports the work of the Trust; and</li> <li>– Information is also provided on the Catalyst for Change Partnership.</li> </ul> </li> <li>Website does not refer to the name of the Trust funded project i.e. 'Tomorrow Today Programme', although reference is made to activities.</li> <li>A link to the Trust website is provided.</li> <li>The combined BIG and Trust beneficiary logo is not visible.</li> </ul>
CENI	<ul style="list-style-type: none"> <li>No webpage dedicated to how the bid partner is linked with the Trust</li> <li>The Trust is referenced within the news article - 'Measuring Up': A Review of Monitoring and Evaluation Practice in the Voluntary and Community Sector in NI (February 2010)</li> <li>A link to the Trust website is provided</li> <li>The combined BIG and Trust beneficiary logo is not visible. (A logo for the BIG is evident on the homepage)</li> </ul>
CFNI	<ul style="list-style-type: none"> <li>No webpage dedicated to how the bid partner is linked with the Trust</li> <li>Within the news section of the website reference is made to CFNI's funded project in an article dated June 2009. The article entitled 'BCT – Observatory Opens' notes that the CFNI appointed Charlie Fisher to the post of Observatory Facilitator for the Trust. The article also identifies objectives of the Observatory Facilitator.</li> <li>Consultation events, under the Observatory Pr are promoted in the news article dated August 2009.</li> <li>Reference is also made to Trust in another article dated March 2010. The article notes that a series of regional awareness events were organised to coincide with the launch of the Trust's Strategy published in May 2010.</li> <li>The combined BIG and Trust beneficiary logo is provided.</li> <li>A link to the Trust website is provided.</li> </ul>

Bid Partner	Reference to Trust in bid partner websites
Volunteer Now	<ul style="list-style-type: none"> <li>• One webpage overview of the Trust outlining:               <ul style="list-style-type: none"> <li>– Launch of the Trust; and</li> <li>– How VDA supports the work of the Trust;</li> </ul> </li> <li>• A link to the Trust website is provided</li> <li>• The combined BIG and Trust beneficiary logo is not visible.</li> </ul>
RCN	<ul style="list-style-type: none"> <li>• No webpage dedicated to how the bid partner is linked with the Trust</li> <li>• Under the section 'News and Events' one article identifies that further funding through the BCT has enabled RCN to offer free courses of up to four hours duration to groups which are volunteer-led or rely mainly on volunteers to deliver their service. The article also lists other courses that have been delivered so date and also provides contact details for further information on the courses.</li> <li>• No link is provided for the Trust.</li> <li>• Under the section 'About Us – Funders' the combined BIG and Trust beneficiary logo is provided.</li> </ul>

### 4.3 Conclusion

Based on the above, it is evident that the Trust has made significant efforts in terms of ensuring engagement with the C&V sector throughout the development of the Trust through CFNI's Observatory project, sector information/dialogue sessions and programme development and launch events.

Recommendations:

- Consultation events to include representatives not only from the C&V sector but also from government and the private sector in order to encourage engagement on a cross-sectoral basis.
- The Trust may wish to consider extending the remit of the Advisory Panel as Trust activities and programmes advance. This would include a wider focus going forward and across all Trust activities. The Trust should continue to actively engage local authorities and governments and in particular the Minister for Social Development to help influence policy change in the future.
- Improved website presence to include promotion of the composite strands of support under the Trust model and inclusion of up-to-date information regarding the progress of activities to date. Business Link<sup>6</sup>, which is government's official website for businesses of all sizes, provides best practice guidelines for website design and should be used as a reference tool. It is important the Trust's aims and activities are clearly communicated to the C&V sector and beyond.

<sup>6</sup> <http://www.businesslink.gov.uk/bdotg/action/layer?topicId=1075384855>

---

## 5 CONSULTATION FINDINGS

### 5.1 Introduction

The following section provides an overview of the views provided by the Trust Administrator, seven Trustees, Protector and the five bid partners. The key findings summarised represent the views stated by the majority of individuals.

### 5.2 Key Findings

Key findings emanating from consultations are categorised as follows:

- Governance;
  - Set-up
  - Trustee Relationships
  - Bid Partner Relationships
  - Role of Trust Administrator
  - Potential role of the Strategic Programme Panel
- Role of the Protector;
- Trust Activities;
  - Bid Partner Projects & Catalyst for Change Partnership
  - Loan Fund – Charity Bank
  - Award Programme
  - Sector Support Programme
- Monitoring & Evaluation;
- Engagement and Perception within the C&V sector; and
- Key Lessons & Areas for Improvement.

#### 5.2.1 Governance

##### Set-up

- Trustees agreed that the relationship with BIG has been effective and that difficulties surrounding the establishment of the Trust has been understood by the funders.
- It was acknowledged that the bid partners invested a lot of time and effort in the development of the original business plan to BIG. The business plan was developed when the impact of recession was less apparent, therefore the Trust activities proposed can now be seen as being innovative, providing timely investment and support in a changing operating climate with reduced funding available.
- Respondents recognised their unique role as part of the Trust and that they have a responsibility and a 'huge opportunity' to help develop a new paradigm for the C&V sector.
- The initial set-up of the Trust in terms of governance arrangements and processes was regarded as ambitious and complex and is more challenging than originally expected. Individuals have dedicated a lot of time to the development of structures with issues surrounding the independence and perception of the Trust now resolved.

- A few respondents commented that the relationship between Trustees and bid partners would benefit from further clarity surrounding roles and responsibilities. It was cited that mechanisms should be in place to increase communication and share learning more effectively to help influence the evolution of the Trust activities.
- As momentum has been gained in the development and roll-out of project activities, as structures are now in place, there is evidence of increased confidence in what the Trust is trying to achieve.

### **Trustee Relationships**

- Trustees are dedicated to the formation of the Trust and are fully committed to the concept of change. Trustees stated that they wanted to volunteer for the role as they were *'inspired'* and *'excited'* about the potential of the Trust in its capacity to influence policy and *'to spearhead new ways of working'*.
- At the outset of the process, a few Trustees felt that they were not able to contribute as much to discussions as they would have liked. Reassuringly, as the Trust has evolved all members of the board feel that their opinions are valued.
- Half of the Trustee respondents felt that they were initially unclear regarding the link between themselves, as nominees, and the nominating bid partner and the requirement for independence. However, the need for independence is now understood and being honoured by all Trustees.
- The time commitment outlined in the original bid was a voluntary commitment of 8-12 days per year. However, the Trustees reflected that the level of work required in terms of reading briefing materials, attendance at meetings etc. has taken longer than expected.
- It was acknowledged that the profile of the Trust is not wholly reflective of the wider NI population. The Trust would benefit from a better balance of gender, ethnic minority and cross-sectoral representation.
- The formation of sub-groups within the board of Trustees was regarded as an effective structure to ensure that issues were delegated and efficiently addressed, with each sub-group reporting back to the overall board regarding; governance, programme activities etc. This format provided Trustees with the opportunity to develop closer relationships in a smaller group setting.
- To help augment the expertise of the Board of Trustees, two additional directors have been sought.
- Respondents agreed that relationships have taken time to develop and although challenging, the overall experience has been *'worthwhile'*.

### **Bid Partner Relationships**

- Bid partners had no previous experience of working together as a consortium; therefore respondents stated that investment was needed to develop relationships, structures and processes.
- The bid partners reflected on the complexities in the development of the Trust and their changing roles. For instance, the bid partners were responsible for the development of the original business plan which was accepted by BIG, the subsequent uncoupling of this relationship occurred due to the allocation of five separate contracts to each of the bid partners and the resulting focus on working independently. The bid partners were also responsible for nominating a board of Trustees, who would take responsibility for the

administration of the Trust. After this divergence and focus on five separate projects, there was a subsequent need to re-converge to enable collaborative work, resulting in the bid partners proactively developing the Catalyst for Change partnership initiative within existing resources. These evolving relationships and responsibilities have taken time to develop and cement and it is only now that momentum is being gained in actual project activities.

- Bid partners agreed that the collaboration with other bid partners is contributing to linking the C&V sector together through networking and the offering of complimenting services.
- Clarity regarding the bid partners status was stated by a few respondents in terms of their status in comparison to other grant recipients i.e. do the bid partners have a 'special' relationship with the Trustees or will the bid partners be regarded as being on the same level as other award programme grant holders.

#### **Role of Trust Administrator**

- Trustees and bid partners agreed that the Trust Administrator is committed, dedicated and effective in his role.
- Respondents felt that the Trust Administrator workload has, at times, been excessive with greater levels of administration support required in the development of the Trust.
- It was noted that the term 'Trust Administrator' did not portray the developmental and strategic work carried out within this role.
- Clarity regarding reporting structures was raised in respect of who the Trust Administrator is answerable to i.e. the Trust Administrator is employed by CFNI and seconded to the Trust.

#### **Potential Role of Strategic Programme Panel**

- Going forward, the Trustees acknowledge the importance of disseminating information and learning emanating from Trust activities to the wider sector. The role of a Strategic Programme Panel, as per the original business plan, was agreed as a beneficial forum to generate ideas and for knowledge sharing. It was noted that the Observatory Project's Advisory Panel (or a sub group of the panel) would be beneficial at a wider Trust level to act as a 'think tank' and would benefit from representation from Government officials, to include DSD and cross-sectoral representatives.
- The roles and responsibilities of a Strategic Programme Panel are yet to be agreed by the Trustees, it is envisaged that a panel may be formed upon progress/completion of the first phase of activities in order to inform discussions regarding future activities of the Trust and to influence change within the sector.

### **5.2.2 *Role of the Protector***

- The role of the Protector was new to each of the Trustees.
- Trustees acknowledged the role of the Protector as ensuring that the Trust is administered appropriately by the Trustees and that the terms of reference within the Trust Deed are being adhered to.
- Trustees referred to the Protector as a 'critical friend', believing that the advice provided and challenging role has contributed greatly to development of the Trust.

- A minority queried the need for the Protector, believing that governance issues could be resolved within the Trustee Board.
- Overall, Trustees were positive regarding their experience of working with the Protector and that a good working relationship has been developed. The majority of Trustees agreed that they would recommend the inclusion of a Protector.

### **5.2.3 Trust Activities**

#### **Bid Partner Projects & Catalyst for Change Partnership**

- The bid partner's projects are progressing and respondents have submitted monitoring reports to CENI in order to capture activities to date. Due to the early stages of the projects being roll-out, the level of outcomes and impacts cannot be measured at this point.
- Tools for monitoring progress was agreed to be improved with the introduction of standardising bid partners progress reports.
- In relation to the development of the Catalyst for Change partnership, bid partners stated that considerable time and resources have been dedicated to the development of the partnership and to the pilot areas selected under this initiative. The process has been agreed as challenging and outside of initial input and contract requirements.
- The importance of documenting the work of Catalyst for Change was highlighted by bid partners to ensure learning would be captured effectively and disseminated to the Trust and other potential stakeholders.
- At this stage, bid partner feel that the partnership is effective and has offered opportunities to enhance partnership links within the sector.

#### **Loan Fund – Charity Bank**

- Issues regarding the proposed investment of £2m to Charity Bank were raised by respondents i.e. large proportion of overall BIG award being allocated; award would not be the control of the Trustees; and funds would not be guaranteed solely for the NI C&V organisations. After lengthy debate, the Trustees have agreed to allocate £1m to the Charity Bank loan fund and a further £1m will be 'ring fenced' for further social finance, pending an evaluation of performance.
- Respondents were aware, to varying degrees, about the loan fund arrangements and recent updates regarding the allocation of the contract award to Charity Bank. It is important that all Trustees and bid partners understand and are fully aware of the offerings within the composite Trust model to allow for a consistent message to be communicated to the sector and to facilitate appropriate sign-posting.

#### **Award Programme**

- Trustees stated that they were confident that the Trust was developing and implementing robust systems for the assessment of award programme applicants. A lack of applicants from rural areas was reported by a few respondents.
- Trustees and bid partners are interested in the projects proposed and the extent of innovation that will emerge from the award programmes.
- It was suggested by a few respondents that constructive feedback should be provided to applicants that were unsuccessful.

- Respondents felt the inclusion of learning circles would provide the Trust with the opportunity to capture learning from the projects funded under the award programme.
- The launch of the award programme was regarded as an opportunity to engage with the C&V sector to communicate one of the core service offerings of the Trust.
- Depending on the outcome/impact of the first phase of award programmes, two respondents queried whether the size of the grants could be increased to involve fewer projects, which may generate greater impact (NB. Current grant size is £20,000 for the Explore Change and £50,000 for the Deliver Change Programme).

### **Sector Support Programme**

- Respondents recognised the need for the sector to increase the level of collaborative work in order to become sustainable and therefore welcomed the inclusion of the sector support programme to equip project beneficiaries with the necessary skills to create and develop partnerships.
- A few respondents stated that larger C&V sector organisations may be equipped with the skills to merger and/or collaborate, however smaller organisations, who are also contributing to the sector, may not have adequate resources or capabilities to take advantage of partnership arrangements.

## **5.2.4 *Monitoring & Evaluation***

- Bid partners agreed that there was a need to realign action plans and to develop more robust mechanisms for monitoring and reporting. CENI has dedicated efforts to re-profiling action plans and has produced an integrated evaluation framework for collating the collaborative efforts of each of the bid projects in a standardised format.
- Bid partners currently prepare six monthly monitoring reports against their individual targets and tasks as well as indicating contribution to the overall aims of Trust, which is collated by CENI as part of their role of internal evaluators.
- The majority of Trustees and bid partners felt that communication on the level of progress and key learning to date could be improved. It was suggested that the members of the board of Trustees and representatives from each of the bid partner organisations should come together on a six monthly basis to present to the wider group the activities and outcomes. The inclusion of case study material was regarded as a useful tool in which to inspire, not only the Trust members, but also the wider community.
- The importance of linking internal and external evaluation findings was also cited by respondents.

## **5.2.5 *Engagement & Perceptions within C&V Sector***

### **Engagement**

- C&V sector consultation events, facilitated by the Trust and through CFNI's Observatory project, were highly regarded and provided effective means in which to engage with stakeholders.
- Although efforts were made to provide a geographical spread of consultation events, increased endeavours in relation to consultation with rural sector representatives was cited by some respondents.

- Respondents agreed that consulting with the sector was instrumental in the development of programme activities, and will ultimately lead to matching support with the current needs of the C&V sector.
- It was agreed that C&V sector engagement should continue as the needs of the sector will change throughout the life of the Trust's support.
- It was suggested that consultations for the C&V sector should be extended to include increased representation from the private sector and government and policy makers to ensure that collaborative relationships are initiated and built upon.

### **Perceptions**

- A few respondents felt that the launch event was premature, as communication was provided to the sector regarding the allocation of £10million, in the absence of robust governance structures being in place. As the development of structures took longer than expected and the time required for development, C&V sector representatives would not be aware of the reasons for the delay so the perception may have been that the Trust initiatives have been slow to start.
- Initial C&V sector consultations events were delivered by the Trust in association with CFNI's Observatory project. Trustees felt that the perception within the sector is one where these projects are synonymous with each other. Furthermore, as the Trust Administrator is an employee of CFNI and seconded to the Trust, there is potential for confusion in the sector regarding the distinct role of the Trust and the bid partner projects.
- Respondents felt that the C&V sector may not be aware of the full range of activities offered by the Trust as the model is complex.
- Respondents believed that the C&V sector recognised that the environment is changing and there is an increased emphasis on working more effectively in order to be sustainable in a reducing funding climate.
- The communication of the Trust in its role as engendering change rather than a traditional grant programme is increasingly being understood within the sector, as perceived by the majority of respondents.

## **5.2.6 Key Lessons & Areas for Improvement**

Key lessons and areas for improvement articulated by respondents included:

### **Key lessons**

- The time invested in the development of the Trust was believed to be necessary to develop relationships and structures. However, the formative process did not progress or gain as much momentum as originally expected.
- The need for an independent board of Trustees and independent administration.
- Importance of communication between the Trust and bid partners to support the process of disseminating information and learning.
- To manage expectations within the C&V sector, and to reduce the perceived lag time between BIG funding being allocated and programmes being rolled out, the launch of the Trust should have been delayed until governance structures were embedded and the Trust was ready to communicate a coherent message.
- Importance of encouraging the sector to be more innovative and committed to social entrepreneurship.

- Importance of community consultation, which should not be seen as ‘navel gazing’ but central to the development of the Trust’s activities.
- Importance of managing expectations regarding what can and cannot be achieved in relation to the Catalyst for Change partnership initiative, due to limited resources.
- Importance of monitoring the allocation of funding, recognising that £10million over a 10 year period is not a finite resource.

#### **Key Areas for Improvements Suggested**

- Trust should look beyond the first 3 years of operation towards a 10 year focus. A few respondents were concerned regard the level of spend to date and the need to manage the process to ensure that support can be provided throughout the duration of the Trust.
- Need to improve communication and collaboration between the Trustees and bid partners.
- Expanding the number of Trustees, with the appointment of two additional Directors will help to reduce the level of work for volunteers, as work/tasks can be delegated to a wider team and sub-groups can be formed.
- The need for further executive support for the team of volunteer Trustees.
- Need for the development of a Strategic Programme Panel in the future to commence the process of disseminating information and learning to the wider sector and to engage strategic thinkers and stimulate innovative thinking to help inform the evolution of the Trust. In order to inform future policy, the need for commitment is required from Government Ministers, in particular the Minister of Social Development. It was noted by some respondents that the Trust is ‘*not ready for another layer of hierarchy*’ that would result from the formation of a Strategic Programme Panel, the remit of this panel will need to be considered going forward as the first phase of activities progress towards completion.
- The need to maximise opportunity for joint working within the Trust and with the wider community.
- A few respondents stated that it may have been beneficial to withhold funding to the bid partners at the outset to allow the Trustees to form and to ensure that a robust strategy is in place in the first instance.
- Investigate the option of providing a greater grant allocation to the original bid partners to augment activities, providing an opportunity for greater/wider impact.
- Bid partners suggested that they would be welcome the opportunity to engage with representatives from BIG.

## 6 IMPACT OF THE TRUST FUND MODEL

### 6.1 Introduction

The following section provides an overview of the anticipated outcomes of the overall Trust model and how these outcomes will be assessed.

### 6.2 Outcomes / Impacts

The Trust anticipates the following outcomes of its work and those organisations and projects it supports.

**Table 6.1**  
 Objectives & Outcomes

Objective	Outcomes
Identify Community Assets/needs	More focussed planning and targeting of investment to communities informed by appropriate baselining of differential community assets and needs.
Target resources effectively	Coordinated, tailored and targeted capacity building interventions to create, build and utilise community assets most effectively.
Build appropriate assets/capacity	<p>More engaged communities within a vibrant well supported voluntary and community sector, participating in active and formal relationships with statutory and other sectors on behalf of their communities as evidenced by:</p> <ul style="list-style-type: none"> <li>- Increased capacity in local infrastructure to support other organisations and to promote and develop volunteering.</li> <li>- Increase in number of organisations meeting nationally recognised standards and recognition of importance of volunteering.</li> </ul>
Strengthen existing assets /capacity	<p>More effective and representative organisations equipped to meet the challenges of the new environment, as evidenced by:</p> <ul style="list-style-type: none"> <li>- Improved governance in organisations through achievement of accredited quality marks (e.g. PQASSO, IIP etc);</li> <li>- Improved evidence of progress and outcomes achieved through application of self-evaluation models;</li> <li>- Improved volunteer management practice in organisations, more confident and empowered volunteers, and improved experience of volunteering for volunteers;</li> <li>- Evidence of impact of volunteering and numbers, profiles involved, increased involvement of underrepresented groups in volunteering and increased awareness of organisations of the need to embrace diversity; and</li> <li>- Improved partnership &amp; collaborative working arrangements.</li> </ul>
Use assets /capacity	<p>More effective design and delivery of services set in the context of post RPA structures and with new relationships between public, private and voluntary and community sectors as evidenced by:</p> <ul style="list-style-type: none"> <li>- Development of partnerships between sector and statutory agencies to design and deliver local services; and</li> <li>- Development of local social economy initiatives.</li> </ul>
Capture Positive change and replicate success	<p>Greater community well-being as manifested through:</p> <ul style="list-style-type: none"> <li>- Higher levels of community engagement and active involvement of people with the capacity to bring about positive change; and</li> <li>- Less dependent and more sustainable communities supported in the new paradigm.</li> </ul>

## 6.3 Assessing Outcomes / Impacts

To date the Trust's operations for Year 1-2 have involved establishing and profiling community assets and needs. This will be followed by Year 2-3 of operations, which will focus on targeting and allocating resources for capacity/asset building. Investment into direct support, transformation and loan grants, has only recently been made (end of Year 2). It is too early therefore to conclude on whether the funding provided through the Trust has had a transformational impact on the C&V sector and disadvantaged communities in NI. However, early indications suggest that there is a both need and a demand for the services being offered, evident by high attendance levels at events organised by the Trust and programmes being oversubscribed.

Table 6.2 outlines our approach to measuring the impact of the Trust's interventions in order to assess the effectiveness of the Trust model over the next year.

**Table 6.2**  
Approach to Assessing Impact

Trust – Sector Support Services/Programmes	Progress	Approach to measuring impact
Transformative Grant Aid to the original bid partners	CENI's internal formative evaluation report relating to achievements will be finalised in December 2010 and published in <b>January 2011</b> .	Consultations with the following stakeholders on a quarterly basis: <ul style="list-style-type: none"> <li>• BIG</li> <li>• BIG NI Committee</li> <li>• Trust staff</li> <li>• Bid Partners</li> <li>• Trustees</li> <li>• Sector representatives</li> <li>• Charity Bank staff</li> <li>• Sector Support Programme delivery agent</li> </ul>
Catalyst for Change partnership		
Loan Fund	Awarding contract of £1m to Charity Bank (two equal payments) – launch to take place on <b>7<sup>th</sup> December 2010</b> .	Desk review of the following reports and an independent assessment of achievements will be conducted on behalf of BIG : <ul style="list-style-type: none"> <li>• Relevant monitoring reports from the Trust, Charity Bank and Programme delivery agent.</li> <li>• CENI's internal evaluation report detailing the progress of the bid partner projects and the Catalyst for Change initiative.</li> <li>• Hall Aiken's evaluation report.</li> </ul>
Sector Support Programme	Trust invited tenders for the delivery of a programme, initially for 3 three years, to support the sector to deal with the issue of collaboration, partnership and mergers – awarding tender to NICVA & C03 at the end of <b>November 2010</b> .	
Award Programme – Explore Change	Launched on 7 <sup>th</sup> May 2010. Phase 1 to allocate 15 awards. 34 applications received. Letters of Offer (LoO) to be issued in <b>November /December 2010</b> .	Survey of award programme participants to be carried out to establish a baseline and a subsequent follow up survey to be carried out at the end of the year to gain an appreciation of the outcomes and impacts achieved.
Award Programme – Deliver Change	Launched on 7 <sup>th</sup> May 2010. Phase 1 to allocate 5 awards 16 applications received. LoO to be issued in <b>November /December 2010</b> .	
<b>15 Cases Studies</b> across a selection of the above Trusts activities (i.e. Loan Fund, Sector Support Programme, and Award Programme) will be developed to provide further depth with regard to progress, activities and outcomes / impacts achieved. Selection of case studies will be agreed with BIG in association with the Trustees.		

## 7 CONCLUSIONS & RECOMMENDATIONS

### 7.1 Conclusions

The evaluation aims to provide an assessment of how effective the Trust model is in engaging with the C&V sector. In particular, the evaluation will consider the Trust's work in increasing community capacity as impacts are realised over the coming year. It will also provide an independent verification of the Trust's achievements and make recommendations for its future development.

The interim evaluation conclusions, based on the following areas outlined in the Terms of Reference, are provided below.

1. **How has the development of the Trust model facilitated increased capacity and is there evidence that capacity has been strengthened to date?**
  - The establishment of the Trust has helped to increase capacity in the sector by drawing together a consortium of like-minded individuals who will collectively have a positive influence within the C&V sector.
  - The extent of this influence will be captured upon further implementation and roll-out of interventions and further collaboration between the Board of Trustees and bid partner organisations.
  - In terms of increased capacity among groups and organisations to date, this is limited as the Trust is in its inception stage where engagement has focused on dialogue with relevant stakeholders to establish community needs in the first instance. The Trust has now developed interventions to respond to these needs. The resulting programme of support will lead to increased capacity initially among grant recipients and subsequently the wider sector through shared learning events.
  
2. **Has capacity been utilised within the Voluntary and Community Sector?**
  - The capacity of the Trustees and bid partners has been utilised within the C&V sector through the development of the Trust and associated projects.
  - Furthermore, capacity has been utilised by engaging the C&V sector in consultation events in order to inform the development of interventions.
  - An Advisory Panel, which includes representatives from the wider sector has also supported CFNI's Observatory project. However, further engagement with the Minister for Social Development, policy makers and private sector representatives would be beneficial going forward in order to utilise expertise and to enhance the level of collaboration on a cross-sectoral basis.
  
3. **What progress, including target setting, has been made by the streams of provision offered by the Trust?**
  - **Bid Partner Projects:** Significant progress has been made in the development and roll-out of bid partner projects and the Catalyst for Change initiative. An internal evaluation has been drafted by CENI, on behalf of the bid partners to capture key achievements, which will be finalised by December 2010 and published in January 2011.

- **Award Programmes:** Significant progress has also been made in the development and launch of the award programmes. The first 23 awards were announced on 25<sup>th</sup> November 2010.
- **Sector Support Programme:** A sector support programme has been tendered, in response to the needs articulated in the C&V consultations events to deal with the issue of collaboration, partnership and mergers. The contract has recently been awarded to NICVA and CO3.
- **Loan Fund:** The original business plan, developed by the bid partners, details the potential to establish a £2m permanent loan fund for the NI C&V sector through the Trust. The Trust Administrator has invested a lot of time and effort liaising between the Trustees and Charity Bank representatives. At its meeting on 26<sup>th</sup> March 2010 the Board agreed to allocate £1m (to be paid in two instalments, the first payment was allocated in November 2010) and an additional £1m to be ring fenced for further social finance, subject to satisfactory performance. This project will be launched on 7th December 2010 and the Trust, in collaboration with Charity Bank, have organised a community assets seminar on 14<sup>th</sup> December 2010.

**4. How have partnerships been developed and supported within the Trust and between sectors?**

- The development of the bid partners Catalyst for Change initiative provides evidence that collaborative links have proactively been developed.
- Partnerships with organisations in the private sector are also evident. For example, BITC are consulting with Business Leadership Networks across NI (i.e. Belfast, North Eastern and North Western) which aim to profile the quality of existing relationships between C&V sector and opportunities for future collaboration. A pilot Business Leadership Network has also been created in Enniskillen.
- Partnerships have also been created through CFNI's Observatory's Advisory Panel.
- Increased communication and collaboration between the Trustees and bid partners is needed to maintain and build on partnerships established through the development of the Trust.

**5. Is the Trust model an effective and efficient support mechanism for the Voluntary and Community Sector?**

- As the interventions developed by the Trust are being rolled-out next month, conclusion regarding how effective and efficient the model is in terms of a support mechanism for the C&V sector cannot be provided at this stage.

**6. Are there any emerging factors that may lead to changes in the Voluntary and Community Sector during the lifetime of the programme in addition to the Trust?**

- It is too early to conclude on whether there are any emerging factors which will lead to changes in the C&V sector. It is important that learning emanating from projects funded by the Trust is captured and shared to the wider sector to help influence change.
- The development of a Strategic Programme Panel in the future, to include engagement from local authorities and government, would also be recommended to ensure that learning can influence policy change, where relevant. The Trust should

continue to actively engage local authorities and governments and in particular the Minister for Social Development to help influence policy change.

**7. How has the Trust shared and disseminated good practice in the Voluntary and Community Sector?**

- Based on the level of interest from C&V organisations at consultation events and the interest in the award programmes, which were oversubscribed, awareness of the Trust is evident throughout the sector. Sharing and disseminated good practice will be achieved at a later stage, upon the implementation, completion and evaluation of programme interventions. It is recommended that greater coherence is achieved in terms of the message between the Trust and the bid partner projects. Furthermore, it is important that a consistent and up-to-date message is communicated through the Trust's website and respective bid partners website and greater clarity communicated regarding the composite offerings of the Trust.

**8. How does the model link to the priorities in the Review of Public Administration (RPA) and other relevant strategies?**

- The Trust aims to support the development of a sustainable infrastructure so that the sector will be capable of meeting future challenges within the context of reduced public finances and the need for collaborative working to bring greater efficiencies. It was envisaged that this challenge would be met through addressing: *'The need for the development of a productive relationship between local authorities and local communities through providing support, building real partnerships, building organizational and community capacity, engaging individual citizens in a more cohesive, more effective way, to recognise, mobilize and use the assets of their communities to address disadvantage, promote tolerance and social inclusion'*. Activities developed through the Trust could be used to enhance public participation and user empowerment to support the delivery of public administration.

**9. Has the development of the Trust model facilitated learning across the Voluntary and Community Sector?**

- Upon the implementation and completion of programme interventions, the Trust model should create learning circles/strategic programme panel to facilitate learning across the C&V sector.

**10. How has the Trust addressed the changing needs of disadvantaged communities in NI?**

- It is too early to conclude on whether the funding provided through the Trust has had a transformational impact on the C&V sector and disadvantaged communities in NI. However, progress has been made to engage with the C&V sector where needs have been captured. In addition, the pilot areas targeted through the Catalyst for Change initiative demonstrate that efforts have been made to target support in areas of greatest need.

## 7.2 Recommendation

The following section provides an overview of the recommendations from the interim evaluation to date:

### Wider Policy Influence

- The Trust may wish to consider **further engagement** with key stakeholders within the **NI Executive** upon the completion and evaluation of the first phase of activities to gain their commitment and support, particularly from the Minister for Social Development. This relationship will provide an opportunity for the Trust to promote activities and to share learning at a government level in order to influence and drive future policy change. It would be important for BIG representatives to be part of this process of engagement, ensuring that the learning emerging from interventions is disseminated across the sector.
- The activities of the Trust are timely and support the need for transformative change within the C&V sector in a climate of reduced funding and potential changes to local council powers. The Trust's programme of services offers the opportunity to contribute to BIG's outcome for the Trust that "*People can actively participate in their communities to bring about change*"; and the Coalition's vision for the 'Big Society'. This further reinforces the need for the Trust, in association with BIG, to effectively link with the NI Executive in the future to ensure that the impact of the Trust model can be experienced across NI.

### Governance

- Although issues relating to governance arrangements have been resolved to a large extent, therefore it is important for the Trustees and bid partners **continue to build on relationships** and focus on gaining momentum in the operational roll-out of activities. BIG representatives should be fully informed of any emerging issues by the Protector and monitor how issues are resolved.
- **Clarity surrounding roles**, responsibilities and linkages should be provided with regard to the bid partners status in comparison to other grant recipients i.e. do the bid partners have a 'special' relationship with the Trustees or will the bid partners be regarded as being on the same level as other award programme grant holders.
- As the Trust moves towards the roll-out and completion of activities, Trustees may wish to consider the **development of a Strategic Programme Panel and/or learning circles** (as per the original business plan) to help capture learning and to generate discussion on transformational change. This could be achieved by extending the focus and range of stakeholders within CFNI's existing Observatory project's Advisory Panel. BIG representatives should also consider their involvement in such a Panel to utilise their capacity as a body driving change initiatives.
- The Trust may want to consider the increased inclusion of **representatives from the private sector** in order to encourage networking on a cross-sectoral basis
- The need for **increased communication** between the Trustees and bid partners is evident, based on feedback from consultees. Regular formal and informal communication should be encouraged through email, telephone and face-to-face contact. A formal six

monthly meeting should be considered to facilitate the process of knowledge sharing, assessing progress and agreeing strategic direction.

- The level of work and input from the Trustees, in their voluntary capacity, should be monitored to ensure that it becomes more manageable. The expansion of the board of Trustees to include two additional Directors will help to reduce the workload for volunteers, as work/tasks can be delegated to sub-groups. The Trustees should continue to monitor the extent to which additional board members will help to alleviate work pressures to **ensure that the role is sustainable**.

#### **Role of the Protector**

- The role of the Protector has proven to be beneficial in helping to support the initial and on-going development of the Trust and in ensuring robust governance processes are in line with good practice and meet the requirements of the Trust Deed. In the Trust Annual Report, it is stated that the Protector *“is a role worthy of further consideration by the sector as it has the potential to strengthen governance within voluntary and community organisations”*.
- BIG should **continue to support the role of the Protector**, as an independent watchdog, responsible for safeguarding public monies and ensuring the integrity of the administration of the Trust.

#### **Activities**

- The Trust should continue to focus on **consulting widely with the C&V sector**, in order to seek their views on the support required and to disseminate learning from interventions. In terms of future actions and programmes, these will be influenced through the operation of and learning from the evaluation of initial programmes and on-going consultation with the sector.
- The Trust Administrator and Communications Officer should consider the further development of the website to include the promotion of the composite strands of support under the Trust model and **up-to-date information** regarding the progress of activities to date. Business Link, which is government’s official website for businesses of all sizes, provides best practice guidelines for website design and should be used as a reference tool. It is important the Trust’s aims and activities are clearly communicated to the C&V sector and beyond.
- In relation to media communication, one of the conditions of accepting assistance from the Trust is that the beneficiary logo is used to acknowledge support. (The beneficiary logo is made up of BIG’s logo locked to the Building Change Trust’s logo, to show that they managed the funding of the award), yet only two of the bid partners effectively use this logo. To enhance the effectiveness of communication regarding the Trust and to ensure **consistent brand awareness**, it is important that the Trust’s website and associated bid partner’s website contain relevant, up-to-date information in a standard format utilising the combined BIG and Trust logo.

### **Future Support**

- The Trust has been established for almost two-years, it is fundamental that the Trustees and bid partners **continue to develop monitoring and reporting systems** to ensure that learning is being adequately captured. Outcomes and impacts that will derive as a result of forthcoming programme activities will help to focus the Trust in their management and allocation/targeting of funding for future support throughout the lifetime of the Trust, until 2018.

## 8 NEXT STEPS

### 8.1 Key Areas to Be Considered

Key areas to be considered at the next stage of the evaluation will include:

- Examination of the Trust Model to include pros, cons and alternative options for BIG to consider if the model were to be implemented in another region;
- The extent to which the outcomes of the Trust Model and the activities of the Trust link with current government strategies;
- The extent to which the outcomes of the Trust Model and the activities of the Trust will help to influence future policy and changes in the C&V sector and disadvantaged communities in NI;
- The impact of the Trust model and whether the structure and activities are conducive to increasing capacity within the C&V sector and the extent to which capacity has been strengthened and learning/good practice disseminated;
- The extent to which partnerships have been developed within the Trust and between sectors;
- The progress of the Trusts three streams of provision (i.e. Direct Support, Transformative Grants, and Loan Funds) and the extent to which targets have been met against the three year plan and strategic objectives;
- The extent to which the Trust model is an effective and efficient support mechanism for the C&V sector; and
- Identification of improvements in operation and future strategy for the next phase of the Trust's operation.

---

## 9 APPENDICES

<b>Appendix I</b>	Board of Trustees – Experience
<b>Appendix II</b>	Timeline of Trust Activities
<b>Appendix III</b>	Explore Change Programme – Overview of projects proposed
<b>Appendix IV</b>	Deliver Change Programme – Overview of projects proposed
<b>Appendix V</b>	C&V sector organisations represented at consultation events
<b>Appendix VI</b>	Overview of C&V sector consultation events

## Appendix I: Board of Trustee - Experience

**Table I.1**  
Trustee Pen Pics

Trustee	Experience
Bill Osborne, Chairperson	<p><i>Current Experience</i></p> <ul style="list-style-type: none"> <li>• Director of Voluntary Service Bureau (VSB) since 1991 (in addition VSB provided support to the Trustee of the Women Caring Trust);</li> <li>• Northern Ireland Adviser to Esmée Fairbairn Foundation;</li> <li>• Deputy Chair Board of Directors, Old Museum Arts Centre;</li> <li>• Member of Board of Directors, Beth Johnson Foundation;</li> <li>• Member, Probation Board for NI;</li> <li>• Committee member, Consumer Focus Post (NI);</li> <li>• Partner (husband) of the Director of Volunteer Development Agency;</li> <li>• Member of the Sydney Stewart Memorial Fund; and</li> <li>• Member of the Board of Wheelworks Youth Arts organisation.</li> </ul> <p><i>Previous Experience</i></p> <ul style="list-style-type: none"> <li>• Member of the National Lottery Charities Board,</li> <li>• Member and former Treasurer of the Prince's Trust Northern Ireland Committee;</li> <li>• Member of the executive committee of the NI Council for Voluntary Action;</li> <li>• Chairperson of the Parents' Advice Council;</li> <li>• Assistant Director of the NI Association for the Care and Resettlement of Offenders;</li> <li>• Vice Chair Simon Community NI;</li> <li>• Volunteer with the Old Museum Arts Centre;</li> <li>• Secretary to the Ian Gow Memorial Fund; and</li> <li>• Deputy Chair of the General Consumer Council for Northern Ireland.</li> </ul>
Michael Wilson, Protector	<ul style="list-style-type: none"> <li>• Joint Managing Partner of Elliott Duffy Garrett, Solicitors, Belfast;</li> <li>• Solicitor and a Licensed Insolvency Practitioner;</li> <li>• President of the Solicitors' Disciplinary Tribunal;</li> <li>• Parent Governor of a Belfast Primary School; and</li> <li>• Board member of a subsidiary company of the Belfast Development Agency.</li> </ul>
Ann McGeeney	<ul style="list-style-type: none"> <li>• Sole trader and Governor, St Dallan's Primary School, Warrenpoint, Co Down</li> <li>• Over 20 years' experience working in peace building and community development work throughout Ireland, North and South;</li> <li>• Over 10 years' experience of working in a voluntary capacity with the Barrow Cadbury Trust;</li> <li>• Currently assisting the recently established Hickinbotham Trust to identify a niche for their approach to supporting community development work in Ireland.</li> <li>• Works independently, balancing paid work with voluntary work with supporting a number of community based organisations in Ireland and internationally in El Salvador and Palestine</li> </ul>
Maurice Meehan	<p><i>Current Experience</i></p> <ul style="list-style-type: none"> <li>• Director, Community Evaluation NI;</li> <li>• Director, Belfast Healthy Cities;</li> <li>• Director, Ardoyne / Shankill Health Partnership;</li> <li>• Investing for Health Manager within the newly established Public Health Agency; and</li> <li>• Qualified Social Worker.</li> </ul> <p><i>Previous Experience</i></p> <ul style="list-style-type: none"> <li>• Partnership Board development with Making Belfast Work;</li> <li>• Community development work in the Lower Falls area of West Belfast; and</li> <li>• Previously managed personal development programmes for the Princes' Trust and family centre work with Save the Children Fund</li> </ul>

Trustee	Experience
Peter Osborne	<p><i>Current Experience</i></p> <ul style="list-style-type: none"> <li>• Member of BIG;</li> <li>• Principal, Rubicon Consulting;</li> <li>• Voluntary secondary review panel member for the SEUPB covering the Peace II and Peace III programmes;</li> <li>• Elected member of Castlereagh Borough Council for 12 years; and</li> <li>• Founded and chaired for the first seven years, Landmark East, a large property-based social enterprise in NI.</li> </ul> <p><i>Previous Experience</i></p> <ul style="list-style-type: none"> <li>• Director of South and East Belfast Health and Social Services Trust;</li> <li>• Director of the Northern Ireland Partnership Board.</li> <li>• Director of the Community Relations Training Learning Consortium.</li> <li>• Custody Visitor on behalf of the Policing Board visiting police stations in Belfast</li> <li>• Commissioner with the Parades Commission from 2000-2005.</li> </ul>
Joe McVey	<p><i>Current Experience</i></p> <ul style="list-style-type: none"> <li>• Chair of the Volunteer Development Agency;</li> <li>• Chair of New Belfast Community Arts;</li> <li>• Board Member Ballynaveigh Community Development Association;</li> <li>• Board Member Mallusk Enterprises;</li> <li>• Partner in Blueprint Development Consultancy Limited; and</li> <li>• Worked extensively in regeneration and development, in local government and the private and voluntary sectors.</li> </ul> <p><i>Previous Experience</i></p> <ul style="list-style-type: none"> <li>• Previously worked in local government and enterprise development; and</li> <li>• Previously worked as a development consultant in Nigeria, Russia and Bulgaria.</li> </ul>
Martin McCarthy	<ul style="list-style-type: none"> <li>• Staff member, First Trust Bank;</li> <li>• Chair, First Trust Bank Staff Charity Committee;</li> <li>• Member, NI Hospice Care;</li> <li>• Member, St Annes Parish Finance Committee, Catholic Diocese of Down &amp; Connor; and</li> <li>• Business in the Community's appointment to BCT.</li> </ul>
Libby Keys	<p><i>Current Experience</i></p> <ul style="list-style-type: none"> <li>• Member Loup Women's Group and the Mid Ulster Women's Network;</li> <li>• Member of Community Relations Council Core Funding Committee;</li> <li>• Member of the Community Initiatives Committee of the Community Relations Council; and</li> <li>• Member of RCN Shared Future Sub Group</li> </ul> <p><i>Previous Experience</i></p> <ul style="list-style-type: none"> <li>• Former District Council community relations officer,</li> <li>• Previously worked with the Future Ways Programme at the University of Ulster.</li> <li>• Previously served as Chair and Vice Chair of the Rural Community Network;</li> <li>• Nominated by a consortia of organisations in the Agri Rural Forum to represent the agri-rural sector on the Peace 2 Monitoring Committee; and</li> <li>• Chaired the Distinctiveness Working Group.</li> </ul>
Billy Gamble	<ul style="list-style-type: none"> <li>• Joined the Northern Ireland Civil Service in October 1971;</li> <li>• Headed the Good Relations &amp; Reconciliation Division in the Office of the First Minister and Deputy First Minister;</li> <li>• Previously Acted Director of Equality;</li> <li>• Former Director of Regional Planning and Transportation in the Department for Regional Development;</li> <li>• Private Secretary to Séamus Mallon, the Deputy First Minister during the first phase of devolution;</li> <li>• Previously held the post of First Secretary (Political) in the British Embassy, Dublin;</li> <li>• Board member of Training for Women Network; and</li> <li>• Trustee of the Gerry Rogan Initiative Trust and of the Integrated Education Fund.</li> </ul>

## Appendix II: Timeline of Trust Activities

**Table II.1**

Key Developments of Trust

Date	Description of Activities
<b>2008</b>	
5th Nov	Trust was established by BIG, following acceptance of a proposal developed by the CFNI, CENI, BITC, RCN, and Volunteer Now
<b>2009</b>	
1 <sup>st</sup> Jan	Trust's Board of Directors received cheque for £10million.
Jan - Sept	Development of Trust's structures and processes as per activities outlined in Section 3.2. The Directors met monthly to establish the all the set up tasks.
9 <sup>th</sup> Sept	The Trust launched a series of community consultation events for the Autumn 2009. These events aimed to engage with a range of organisations across the sector to discuss key issues and help to inform how the Trust's resources will be used to support the sector.
24 <sup>th</sup> Sept	North West community consultation event
29 <sup>th</sup> Sept	Community Arts, Belfast community consultation event
30 <sup>th</sup> Sept	Fermanagh community consultation event
1 <sup>st</sup> Oct	Mid Ulster community consultation event. Workshop held in partnership with Cookstown and Western Shores Area Network (CWSAN) and Community Organisations of South Tyrone Area (COSTA).
6 <sup>th</sup> Oct	Regional Women's Sector community consultation event
7 <sup>th</sup> Oct	North Antrim community consultation event
14 <sup>th</sup> Oct	Coleraine & District community consultation event. Workshop held in partnership with Coleraine Rural and Urban Network and the Trust
23 <sup>rd</sup> Oct	North Belfast community consultation event
28 <sup>th</sup> Oct	Omagh community consultation event
4 <sup>th</sup> Nov	East Belfast community consultation event
5 <sup>th</sup> Nov	Workshop held in partnership with the East Belfast Community Development Agency (EBCDA) and the Trust
3 <sup>rd</sup> July	Workshop to discuss " <i>What needs to be done to build a better community and voluntary sector</i> ". participants agreed key themes including sustainable resourcing, effective partnership work, engaging and valuing volunteers
25 <sup>th</sup> Mar	Trust website launched
25 <sup>th</sup> Mar	Observatory Facilitator appointed
<b>2010</b>	
27 <sup>th</sup> Jan	' <i>Mergers &amp; Collaboration</i> ' Seminar - Building Change Trust, NICVA and 'Chief Officers Third Sector ('CO3') brought together 27 representatives of the sector to discuss mergers and collaboration and their future potential in the sector.
4 <sup>th</sup> & 5 <sup>th</sup> Feb	Chief Officers Third Sector (CO3) Leadership Voyage Conference. The Trust provided £1,500 funding towards attendance bursaries for staff and/or board members of community and voluntary sector organisations. The conference aimed to give leaders in NI's third sector space to consider future trends and developments, skills to manage the forthcoming change and inspiration and passion to lead their organisation through change.
17 <sup>th</sup> Feb	' <i>Measuring Up</i> ' - A Review of Evaluation Practice in the Voluntary and Community Sector was launched recently by Community Evaluation Northern Ireland. The research, which was funded by the Department of Social Development and by the Trust, set out to review the current state of evaluation practice and to inform debate on how this needs to be developed in the face of a very challenging political and economic environment.
19 <sup>th</sup> Feb	Seminar to consider development potential for social investment in the NI community and voluntary sector using the Trust
26 <sup>th</sup> Mar	' <i>Working Towards a Way Forward</i> ' Conference – presentation by Trust Chairperson to over 100 delegates regarding the progress to date and plans for the future.
6 <sup>th</sup> May	Trust Strategy 2010-2013 published
6 <sup>th</sup> May	Invitation to tender issued for the development and delivery of a partnerships, collaboration and mergers support programme for the Northern Ireland community and voluntary sector. Closing date for return of completed applications is 27 <sup>th</sup> August 2010.

<b>Date</b>	<b>Description of Activities</b>
6 <sup>th</sup> May	Recruitment call for two additional Directors to support the development of the Trust
7 <sup>th</sup> May	Exploring Change and Deliver Change launch event
11 <sup>th</sup> June	Phase 1 of Exploring Change and Deliver Change closed for applications
17 <sup>th</sup> June	The Trust Annual Report & Accounts for 2009 launched
21 <sup>st</sup> June	The Trust Director Joe McVey awarded an OBE and the appointment of Billy Gamble as a Director of the corporate Trustee of the Trust following nomination by CFNI.
19 <sup>th</sup> July	Recruitment of two additional directors. In May 2010, the Trust issued a recruitment call for two additional Directors to support the development of their activities. The aim is to have additional Directors in place by Autumn 2010.
26 <sup>th</sup> July	Deliver Change Phase 2 Information Session. Phase 2 of the Deliver Change awards programme will make 5 awards of around £50,000 per award. The awards will enable organisations start to implement change for future sustainability in the context of making a contribution to one or more of the Building Change Trust proposed outcomes.
3 <sup>rd</sup> Sept	Deliver Change Phase 2 Information Session was hosted by the Trust (Phase 2 closed for applications on 17th September)
2 <sup>th</sup> Oct	Information sessions for Phase 2 of Exploring Change promoted

## Appendix III: Explore Change Programme - Overview of projects proposed

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
Action Mental Health	£10,650	<ul style="list-style-type: none"> <li>Option appraisal for Action Mental Health (AMH) training units in Downpatrick and Antrim</li> <li>Required due to current facilities not being fit for purpose</li> <li>Appraisal will review possibility of utilising vacant building space (10,000 sq feet) with the view to realising a potential income stream for AMH.</li> <li>On-going discussions with AMH clients has identified that the current AMH service provision does not fully meet their needs</li> </ul>	<ul style="list-style-type: none"> <li>Complete an option appraisal for building utilization - This would support the BCT aims of "community development" with the New Horizons units becoming community hubs.</li> <li>Develop a future service delivery model for AMH New Horizons Downpatrick and Antrim - This supports "active citizenship" and reflects AMH behaviour "involving &amp; empowering individuals, recognising and valuing their input".</li> </ul>	<ul style="list-style-type: none"> <li>Opportunity for Action Mental Health to learn from other expert authorities e.g. Sainsbury's Mental Health Centre about other cost effective, person centred service delivery models.</li> <li>Increase partnership and collaboration delivering community based services;</li> <li>Improve access to services; strengthen capacity to deliver services more relevant to people's needs.</li> </ul>	<ul style="list-style-type: none"> <li>Complements the AMH corporate strategy 2009-2012 Objective 2: ensure financial sustainability where diversity of income has a target of £45,000 per annum and objective 4: To develop quality services where a proven need is identified have a building fit for purpose in Downpatrick.</li> <li>Also complement the development of community mental health services as identified in the South Eastern Health and Social Care Trust "Local Services for Local People Safe and Sustainable Services for Population" 2009</li> </ul>
Aisling Centre	£3,766	<ul style="list-style-type: none"> <li>Proposal to implement Clinical Outcomes in Routine Evaluation (CORE), a robust evaluation tool that is incorporated into its psychotherapy and counselling service.</li> <li>Involves a client self-report questionnaire designed to be administered before-and-after-therapy.</li> <li>CORE will enable the Centre to explore outcomes against client and therapeutic factors, comparisons with national benchmarks for similar organisations and client populations.</li> <li>Implementation of CORE would also respond to recommendations outlined within the CLEAR project mapping summary report</li> </ul>	<ul style="list-style-type: none"> <li>Therapist and client will have a real sense of what the issues are over 4 areas of experience whilst forming a close working alliance</li> <li>Individuals most at risk will be identified and an appropriate plan of care put in place</li> <li>Increase information available to therapists about their client's experiences and what may be helpful in the healing process;</li> <li>Therapist and client will be able to identify in what ways therapy has been helpful based on the same indicators as pre therapy; and</li> <li>Therapist and client will be able to identify areas of experience that still need attention.</li> </ul>	<ul style="list-style-type: none"> <li>New innovative counselling service which conducts its operations with a more efficient and effective operation, with a greater client focus.</li> <li>Using client and practitioner experience to identify the issues and develop any plan of care.</li> <li>In this model the client takes responsibility for determining the actions that will guide their counselling therapy.</li> </ul>	<ul style="list-style-type: none"> <li>No Response Provided</li> </ul>
Aware Defeat Depression (ADD)	£20,000	<ul style="list-style-type: none"> <li>To aid recovery or prevent people from developing depression.</li> <li>Moving into new markets &amp; new areas such as Scotland and ROI to determine how to</li> </ul>	<ul style="list-style-type: none"> <li>Identify the potential for new, different/better ways of working for ADD, including collaboration with Mindwise which will help the organisation penetrate &amp; extend their</li> </ul>	<ul style="list-style-type: none"> <li>ADD hope to be able to cascade information &amp; skills about protecting mental health across all sectors, thus increasing community capacity,</li> </ul>	<ul style="list-style-type: none"> <li>This project will help determine the best way to develop our education &amp; training capacity in line with our vision &amp; strategic</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
		improve financial security in the long term <ul style="list-style-type: none"> <li>ADD new strategic plan complements the proposal and states the need to investigate how to respond to the economic downturn &amp; changes introduced by the new government which may affect their way of working &amp; fundraising</li> </ul>	geographical influence. <ul style="list-style-type: none"> <li>Enable the N.I. mental health sector to develop a cross border dynamic as the organisation anticipates that Aware &amp; Mindwise will concentrate a significant amount of resources into the development &amp; expansion of education programmes focused on the signs, symptoms &amp; recovery from mental illness, throughout Ireland, to meet growing demand for this knowledge.</li> </ul>	<ul style="list-style-type: none"> <li>Its objective is to provide Aware &amp; Mindwise with the best way to increase training &amp; education capacity in NI &amp; potentially in the South &amp; Scotland</li> </ul>	plan. It will provide similar information to Mindwise, who have recognised their need to address their limited training resources/marketing expertise & are talking to us about partnership plans in this area of work
Cedar Foundation	£19,000	<ul style="list-style-type: none"> <li>Karuna Home is a small, parent led, charitable organisation providing high quality residential daycare support for nine adults with complex learning and physical disabilities.</li> <li>Main aim is to enable residents to have an ordinary life integrating into community life according to their individual needs and abilities.</li> <li>Cedar Foundation agreed to work closely with the Trustees during the current financial year to explore how above aim might be achieved.</li> <li>Trustees found the regulatory environment increasingly challenging and approached The Cedar Foundation for support in meeting these challenges and ensuring the long term sustainability of Karuna.</li> </ul>	<ul style="list-style-type: none"> <li>To achieve the long term sustainability of the active citizenship and community engagement for people with complex learning and physical disabilities.</li> <li>To demonstrate an effective collaboration and continuing involvement of Parent Trustees in new governance arrangements that underpins this sustainability.</li> <li>To create a more independent, confident and effective resource to meet the increasingly complex needs of disabled people living in the community.</li> <li>To demonstrate an effective transfer of knowledge between both organisations to promote new ways of working and effective co-operation. For example utilisation of procedures and staff development to promote user participation and engagement.</li> </ul>	<ul style="list-style-type: none"> <li>Achievement of identified outcomes will demonstrate mutual benefits for all partners in terms of shared learning, a more efficient utilisation of a community resource, and strengthening the voice of service users and parents in the sustainability and commissioning of similar community resources.</li> </ul>	<ul style="list-style-type: none"> <li>Cedar Foundation and The Karuna Home deliver their residential services under a management agreement with Habinteg Housing Association.</li> <li>Both have sustained a close working relationship with Habinteg who support the potential of both organisations achieving a successful merger, as this underpins their strategy of providing a wide range of housing solutions in the community for people with a range of complex needs.</li> </ul>
Chartered Institute of Public Finance and Accountancy (CIPFA) – 'Community on Board'	£12,668	<ul style="list-style-type: none"> <li>Seeks to explore the development of a comprehensive support mechanism that will improve governance within the community/voluntary sector by enhancing the skills of members of Boards and Governing Bodies.</li> <li>Development of a training course, materials, tools to assist managers and their teams guidance on the sector's legislative and regulatory requirements and a governance 'troubleshooting' service.</li> </ul>	<ul style="list-style-type: none"> <li>The proposed project has the potential to help professionalise the Boards and Management Committees of community and voluntary groups. By achieving this, CIPFA believes that the sector can play a greater role in public life in Northern Ireland, e.g. by equipping people with the right skills to join Boards of public bodies.</li> </ul>	<ul style="list-style-type: none"> <li>The development of a comprehensive training programme has the potential to be a widely used by the whole sector. The motivation for organisations to use these tools would be to increase skills of individuals, their organisation and equip the sector to face future challenges and opportunities.</li> </ul>	<ul style="list-style-type: none"> <li>The proposed project would complement the finance and governance training that CIPFA has provided to date to 'the public sector and a number of not for profit organisations'.</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
		<ul style="list-style-type: none"> <li>Government's Response to Investing Together: Report on the Task Force on Resourcing the Voluntary and Community Sector', states that governance development is still outstanding with regards to identifying training needs of Board members and senior executives in the sector.</li> </ul>			
Chartered Institute of Public Finance and Accountancy (CIPFA) <i>'Recognising Standards of Governance'</i>	£19,455	<ul style="list-style-type: none"> <li>'Recognising Standards of Governance', proposed to develop ways of improving governance within the third sector.</li> <li>It seeks to identify (and develop if required) a suitable toolkit that will comprehensively audit organisational governance against good practice.</li> <li>Outcomes will be mapped to an accreditation scheme that will award a 'kite mark' to publicly demonstrate that an organisation meets good governance standards.</li> <li>There is widespread over regulation and duplication of audit of public funding in NI. The governance toolkit and accreditation scheme would give funders the ability to take a more risk-based approach to regulation and ease the accountability burden for all concerned.</li> </ul>	<ul style="list-style-type: none"> <li>The proposed project will produce a recognised good governance toolkit and a governance accreditation scheme.</li> </ul>	<ul style="list-style-type: none"> <li>Development of a toolkit and accreditation scheme has the potential to be a widely used service that would be provided to the whole sector.</li> <li>Potential for improved governance and the prospect of less regulation as a result of achieving good governance.</li> </ul>	<ul style="list-style-type: none"> <li>The proposed project would complement the finance and governance training that CIPFA has provided to date to 'the public sector and a number of not for profit organisations'.</li> </ul>
CO3	£14,000	<ul style="list-style-type: none"> <li>The aim of the project is to; Support the sustainability of CO3 and considering existing and potential social economy projects related CO3's core activities; To consider whether it might be possible to encourage succession and refresh sector leadership by offering CO3 members the opportunity to develop skills and expertise in being able to offer consultancy skills.</li> <li>CO3 has some streams of self-generated income that might, with exploration and support, develop into social economy projects but does not have the resources to fully consider these ideas and ensure member</li> </ul>	<ul style="list-style-type: none"> <li>CO3 will produce a feasibility study and business plan, on social economy options for the association and its members, based on member views and ideas, by September 2011.</li> </ul>	<ul style="list-style-type: none"> <li>Potential for third sector leaders to consider succession, releasing the strong skills and experience within CO3 membership for CO3 members rather than always 'looking outside' the sector for consultancy skills.</li> <li>Enables CO3 members to think about social economy initiatives for their membership association, allowing personal involvement and deeper learning about the potential for social economy.</li> <li>CO3 would be first third sector leadership organisation across the UK</li> </ul>	<ul style="list-style-type: none"> <li>The proposed project is central to CO3's strategic direction as set out in the CO3 Corporate Plan 2010 - 2013. The Social Enterprise Strategy for Northern Ireland was launched in March 2010. This project makes a direct contribution to this strategy in CO3 directly considering the potential for social economy, but also in engaging CO3 members who themselves lead organisations with considerable social</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
		<p>views and agreement on a way forward.</p> <ul style="list-style-type: none"> <li>Currently the third sector relies on a range of - private and public sector consultants to provide support, expert advice and research</li> </ul>		<p>to explore the potential for social enterprise linked to third sector leaders.</p> <ul style="list-style-type: none"> <li>Also, there is an opportunity for ongoing 'mutual learning' through the interaction between consultant and consulted</li> </ul>	<p>enterprise potential, allow for 'Increasing awareness of the sector and establishing its value to the local economy', as the strategy states.</p>
Community Arts Forum (CAF)	£19,440	<ul style="list-style-type: none"> <li>Ensure continued and increased rural access to community arts as a medium for building community and personal development.</li> <li>The project will track the progress of participants and groups as they creatively think through changes they want for their communities to enable participants to understand inform and change policy.</li> <li>Contemporary research on the impact of community arts has been identified as a gap and critical to the sustainability of community arts work.</li> <li>CAF is carrying out pilot research on the impact of community arts on communities in Belfast and their development. RCN has a comprehensive and ongoing research programme. These two organisations have combined expertise and knowledge will inform the proposed rural arts research.</li> </ul>	<ul style="list-style-type: none"> <li>A research report which the community arts and rural sectors can use as a lobbying tool to create change, promote the sustainability of the sectors and assist the rural and community arts sectors, understand, inform and change policy and create sustainable change in rural communities.</li> <li>Clear, relevant and current information on the impact of community arts on rural communities.</li> <li>Clear evidence of how community arts can be used strategically and constructively in rural settings.</li> <li>A strategy to regionalise community arts, including mapping where community arts takes place.</li> <li>Launch the report to an audience of community arts activists, policy makers and government representatives, ensuring findings and recommendations are well promoted and disseminated.</li> <li>If appropriate, CAF and RCN will seek funding to develop further research to: help the community arts and rural sectors adapt to cuts in public funding; maximise the potential of both sectors; assist CAF to become more regional and RCN to develop a community arts dimension.</li> </ul>	<ul style="list-style-type: none"> <li>The project will promote innovative ways of using, evaluating and articulating the benefit of the arts in rural settings and consider how the arts can be used to explore a range of issues such as peace building, development and planning and contribute to meaningful policy change and lobbying</li> </ul>	<ul style="list-style-type: none"> <li>The project will complement CAF Strategy which has 2 strategic aims of Regionalisation and research. The proposed project will also complement RCN Strategy for 2007-2013. The Strategy is premised on two broad themes: promoting excellence in rural community development and articulating a rural voice which is inclusive, confident and effective.</li> </ul>
Community Foundation for NI (CFNI)	£19,000	<ul style="list-style-type: none"> <li>Build on collaboration amongst a number of organisations and collectively contribute to creating a culture of philanthropy in NI</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholders in NI will gain a better understanding of the philanthropy environment.</li> </ul>	<ul style="list-style-type: none"> <li>Building on recently established contact, sharing learning, and collectively considering a way forward</li> </ul>	<ul style="list-style-type: none"> <li>One of the strategic objectives of the CFNI is to build relationships with key</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
		<ul style="list-style-type: none"> <li>• Due to Public expenditure its essential that the potential of private philanthropy is fully realised and reaching less popular causes and organisations that do not have the capacity for fundraising.</li> <li>• Philanthropy or planned strategic charitable giving is in its infancy in NI. Research and experience in the US, GB and the RoI points to the recent increase in demand for philanthropy advice and noted that satisfying this is critical to instilling a culture of philanthropy</li> </ul>	<ul style="list-style-type: none"> <li>• Increased interest in the promotion of philanthropy and the potential to contribute to the future</li> <li>• Increased access to knowledge and resources required to promote philanthropy and to facilitate giving</li> <li>• Leadership and outline of an integrated strategy for change.</li> </ul>	<p>offers scope for innovation and sharing learning.</p> <ul style="list-style-type: none"> <li>• It will help move philanthropy centre stage and enable those organisations with an interest in promoting philanthropy to work together to accelerate market development. It will therefore be of benefit to the organisations implementing the project, other stakeholders, and the sector as a whole.</li> </ul>	<p>individuals, organisations and institutions that have the potential to promote philanthropy in order to raise awareness of philanthropic opportunities.</p> <ul style="list-style-type: none"> <li>• This project aligns with these objectives. In addition, Arts and Business and the Heritage Lottery Fund are keen to help arts/culture organisations make best use of changes and to share skills, knowledge and experience and maximise the potential of philanthropy.</li> </ul>
Forthspring Inter Community Group	£19,685	<ul style="list-style-type: none"> <li>• Explore how to develop a culture of sharing, increasing generosity and social interaction within a local community.</li> <li>• This will involve changing how staff engage with local residents, social life coaching to local residents and through developing a 'Have a Go' programme with a system of rewards and incentives to promote engagement in Forthspring's work.</li> <li>• Funding contributing to salary costs; job advertisement management costs; training courses; printing and advertising budget.</li> <li>• Explore innovative approaches to building local commitment and creating sustainable community resources including the use of a timebank to reward effort, cottage industries to use local skills to create community capital and building less dependent relationships between paid staff and local residents</li> </ul>	<ul style="list-style-type: none"> <li>• More engaged and active citizens supporting the work of Forthspring and raising levels of community participation locally, encouraging a sense of ownership and commitment locally.</li> <li>• Building a sustainable community resource based on local ownership and participation</li> <li>• Developing new ways of connecting local residents to their community resources</li> <li>• Creating local cottage industries that directly create community benefit through a visible community dividend.</li> <li>• Exploring new ways of working for staff in a community moving from doing things for people to doing things with people.</li> <li>• Linking new levels of involvement to future opportunities such as community planning and creating a new vision for a disadvantaged area.</li> <li>• Developing a more sharing and generous organisation and community with an increase in community pride and spirit.</li> <li>• Provision of a social and life coaching programme to increase the confidence of local people and challenge them to be more</li> </ul>	<ul style="list-style-type: none"> <li>• The project is innovative in attempting to resurrect older notions of community spirit and tie these into existing community infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>• Forthspring is committed to developing innovative approaches to developing a sustainable community resource exploring ways to maximize local engagement and a sense of ownership.</li> <li>• Forthspring is working with NIHE through the Shared Neighbourhood Programme contributing to DSD's volunteering strategy and its commitment to re-energize and increase levels of volunteering.</li> <li>• The project will contribute to the Building Change Trust's aim to support organisations to work smarter and better, building a strong, vibrant, independent and relevant community sector.</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
Intercomm	£20,000	<ul style="list-style-type: none"> <li>• Intercomm have identified that based on the pending changes within the sector, the organisation along with its proposed partners are committed to moving beyond the sectors reliance on short term funding to sustain its work.</li> <li>• Aim to embark on a journey that will result in the organisation generating 70% of its annual income, with the remaining 30% being made up of short term funding and income donated through strategic alliances within the private sector.</li> <li>• Realising the international brand that Intercomm has and using it as a platform to secure additional International and Local Contracts</li> <li>• Developing a commercial Patrons scheme aimed at engaging the private sector.</li> <li>• Conduct an internal financial review on how the organisation can become more commercially aware of the service and position the organisation for 'commissioning opportunities' through RPA</li> <li>• Carry out a social return on investment analysis on the organisations interface work</li> <li>• Develop a range of collaborative and mutually beneficial working partnerships locally, regionally and internationally.</li> </ul>	<p>empowered and involved in the local community and local issues.</p> <ul style="list-style-type: none"> <li>• Increase in the skills base of all who take part within the overall programme.</li> </ul> <ul style="list-style-type: none"> <li>• Intercomm will move towards a financial model that is based on generating at least 80% of its own income.</li> <li>• Commercial Patrons Scheme with a minimum of 50 organisations agreeing to pay a minimum of £500 per annum to be associated with the organisation</li> <li>• Intercomm will be engaging at a senior level with the Department of Justice and other Government Departments about managing front line public services around Interfaces and Parades more efficiently than the current statutory agencies</li> <li>• Developed an Integrated Marketing Strategy that will promote the good work of the organisation both locally and internationally</li> <li>• Established a range of partnerships which will contribute to the securing of contracts that Intercomm would not otherwise win on their own and support the delivery of their sustainability strategy.</li> </ul>	<ul style="list-style-type: none"> <li>• Development of a financial (income generating) model that will support the sustainability strategy for the organisation.</li> <li>• Intercomm will be capitalising (financially) on their contacts and networks that are already in place in the International arena and using this as an incentive to engage the local private sector.</li> </ul>	<ul style="list-style-type: none"> <li>• Intercomm is committed to sharing and disseminating their experience of Track Two peace work locally, regionally and internationally. This is a key tenet of their strategic planning process. There is a growing appetite to learn lessons from the Irish Peace Process. US universities, the European Union, USAID, UNDP or DFID are all interested in learning the lessons and the mistakes from the Irish Peace Process.</li> <li>• Intercomm is also seeking to build collaborative relationships and align their product with the needs of a range of international NGOs, development agencies and governments</li> </ul>
Liberty Consortium	£20,000	<ul style="list-style-type: none"> <li>• Possibility of an onsite organic community café or farm shop, which fibs the capability of pulling each strand of our diverse projects together to enhance community development whilst aiding our financial sustainability</li> <li>• Aim to explore the possibility of developing a new and innovative enterprise opportunity</li> </ul>	<ul style="list-style-type: none"> <li>• An evaluation and strategic plan for the development of an innovative social economy enterprise to be based at the Playtrail site.</li> <li>• Feasibility study and strategic plan which will inspire a clear future vision for the organisation, assisting them to move towards confident independence, free from the</li> </ul>	<ul style="list-style-type: none"> <li>• Examine new ways of working in partnership to enhance the effectiveness and sustainability of the organisation while also examining external relations to advance community development</li> </ul>	<ul style="list-style-type: none"> <li>• Aid the organisation to grow internally and externally</li> <li>• Complement work that the organisation has already carried out.</li> <li>• Complement the future plans and actions of the Building</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
		<p>based at the Playtrail site; exploring and applying existing best practice and; evaluating and developing partnership working within the Consortium.</p> <ul style="list-style-type: none"> <li>• Feasibility study to comprise current user consultation and survey; case study visits; partnership evaluation and strategic development workshops.</li> <li>• Examine structural change and organisational efficiency and effectiveness in order to develop new ways of working to aid effective cooperation within the Consortium.</li> </ul>	<p>confines of piecemeal funding</p>		<p>Change Trust and the wider community and voluntary sector.</p>
<p>Mulholland After Care Services (MACS)</p>	<p>£19,900</p>	<ul style="list-style-type: none"> <li>• Aim to facilitate a pilot project in order to share and develop jointly created outcomes monitoring system with providers in the voluntary and statutory sector.</li> <li>• MACS aim is to become a social enterprise initiative selling the system across the sector.</li> <li>• Increasing drive from statutory and voluntary funders to evidence the direct impact of practice on clients and numerous strategies emphasising the need for organisations to set clear and specific targets and to monitor the outcomes of their interventions.</li> </ul>	<ul style="list-style-type: none"> <li>• Enhance, upgrade and perfect the current outcomes monitoring system through collaboration and shared learning with four other providers from the youth sector, social services, housing and mental health.</li> <li>• Share the system and learning with other providers across the sector.</li> <li>• Development of a social enterprise project selling the outcomes monitoring system (SPIN).</li> </ul>	<ul style="list-style-type: none"> <li>• Development of outcomes monitoring to both the statutory and voluntary sectors. This pilot will provide us with the opportunity to work collaboratively with the statutory and voluntary sectors and to share our collective learning with the wider sector.</li> <li>• Enable the SPIN system to be marketed as a tool for all providers interested in monitoring outcomes.</li> </ul>	<ul style="list-style-type: none"> <li>• The proposed project is consistent with MACS Strategic Plan and Dfes, 'Every Child Matters' Programme which has identified five key higher level outcomes including Be Healthy, Stay Safe, Enjoy and Achieve, Make a Positive Contribution and Achieve Economic Wellbeing.</li> <li>• The SPIN system is based on monitoring 20 key indicators relating within these five higher level outcomes.</li> <li>• The project is also consistent with OFMDFM, 'Our Children Our Young People Our Pledge 10 year strategy for Children and Young People'. The strategy identifies the same five higher level outcomes with the addition of 'Living in a society that respects their rights'.</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
New Life Counselling Service	£20,000	<ul style="list-style-type: none"> <li>• Aim to instigate a research initiative which will consider their current systems, collecting data on the experience of their clients accessing counselling services. Currently the organisation relies to an extent on the manual collection of data. This is not time efficient and does not go far enough in enabling New Life Counselling to evidence the value of their work on both human and financial terms</li> <li>• Establish a system of collecting comprehensive data on their service users which will include personal records, case notes and monitoring information.</li> <li>• Develop a robust evaluation process to assess the impact of counselling services in improving the lives of individuals. This will enable the organisation to assess the economic benefit of these services using the Social Return on Investment (SROI) tool.</li> <li>• The project will provide evidence of the benefits of the service and will add strength to the discussion on future funding.</li> </ul>	<ul style="list-style-type: none"> <li>• Comprehensive system of data collection and analysis</li> <li>• Availability of robust qualitative and quantitative financial data for internal and external stakeholders</li> <li>• Model available to other voluntary and community sector organisations to allow them to put a cost on their services.</li> <li>• Potential access funding which has previously been inaccessible to us as we will have hard financial evidence of the worth of our service</li> <li>• Aid strategic planning ensuring the development of services which are most benefit to clients and financially viable.</li> </ul>	<ul style="list-style-type: none"> <li>• Innovative in collating qualitative data, monitoring and evaluation of difficult to measure information, and produce robust reports.</li> </ul>	<ul style="list-style-type: none"> <li>• The project complements New Life Counselling Strategic Plan.</li> <li>• The system would be capable of adaptation and use by other organisations requiring both analysis of qualitative benefits of services and cost benefit analysis</li> </ul>
New Lodge Arts	£18,150	<ul style="list-style-type: none"> <li>• Aim to develop the New Lodge Arts 'model' across North Belfast enabling exploratory work in respect of partnerships and collaborations with other organisations and to develop a strategy in which to deliver change.</li> <li>• Objectives include: formalise strategic collaborations with community organisations, residents and schools in North Belfast and to strengthen partnerships with arts providers and venues across Belfast in order to create a coherent arts delivery infrastructure for North Belfast.</li> <li>• There is limited capacity of the organisation at the present time</li> </ul>	<ul style="list-style-type: none"> <li>• Increase active citizenship and community development through the participation of community organisations and individuals from across North Belfast promoting a shared vision of a 'North Belfast Community'.</li> <li>• Contribute to community development by bringing people together on a cross-community basis both on the steering group and as participants in the delivery of the strategy. They will be empowered with ownership of the process.</li> </ul>	<ul style="list-style-type: none"> <li>• Enable the North Belfast community and the wider arts sector in Belfast to develop and realise an inspiring future vision for North Belfast and an innovative model of delivery that can be replicated elsewhere.</li> </ul>	<ul style="list-style-type: none"> <li>• No Response Provided</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
NI Environment Link	£19,500	<ul style="list-style-type: none"> <li>The difficulty in promoting the contribution of the environment to public is increasing. New communication mechanisms are required as traditional methods are no longer effective. This project brings government and NGOs together to improve delivery of environmental outcomes.</li> <li>To help the environmental NGO (eNGO) sector in NI to deliver a sustainable environment during a time of rapid and severe change through developing a stronger, more cohesive society and clear, consistent, 'resonant'.</li> <li>The project will frame the debate using new behavioural psychology techniques and innovative interaction mechanisms to develop environmental priorities, political messaging and public promotion ideas to help the eNGOs prioritise environmental outcomes and action and, from those functional needs, to identify the structures that can most effectively deliver them.</li> </ul>	<ul style="list-style-type: none"> <li>An environmental NGO sector which is more efficient and effective in delivering its messages to government and society,</li> <li>An eNGO sector with enhanced and improved roles in assisting delivery of government targets, actions and services,</li> <li>Recognition by society in general and decision makers in particular that addressing environmental issues in a coherent fashion is fundamental to maintaining a high quality of life and thriving economy.</li> <li>Collaboration amongst eNGOs and government to deliver environmental messages and practical projects.</li> <li>More effective collaboration amongst all funders and involved bodies.</li> </ul>	<ul style="list-style-type: none"> <li>Addressing societal change through a major revision of the eNGO sector could provide a template for similar changes in other fields</li> </ul>	<ul style="list-style-type: none"> <li>NIEA fundamental roles are to promote the environment in the most effective way and to facilitate the work of its members both of which are fulfilled through this project.</li> <li>Outside of the NIEA there are a number of actual and potential funders, both within and outside of government, for eNGO work. This project will help them as it will identify areas of work that could be effectively and efficiently undertaken for them by eNGOs and promote the value of the sector as a cost effective way to deliver their own programmes of work</li> </ul>
North West Centre for Learning & Development	£20,000	<ul style="list-style-type: none"> <li>Aim is to develop a new Social Economy Business which would be mainly staffed by previous programme participants who completed training and achieved qualifications but have been unable to secure employment.</li> <li>As providers of Government funded training programmes this will also address the problems faced in securing quality work-placements for trainees which also has the potential to lead to employment.</li> <li>Currently there are a number of community organisations, small businesses and individuals who are experiencing difficulty in meeting the costs of computer repairs, maintenance. This project aims to fulfil this need.</li> </ul>	<ul style="list-style-type: none"> <li>Completion of a business plan and a marketing strategy for a social economy business which will be staffed mainly by previously unemployed people who have achieved high level training successes and who will deliver support services to other groups, organisations and individuals. This business venture will also offer quality work experience for those currently undergoing training.</li> </ul>	<ul style="list-style-type: none"> <li>An entrepreneurial venture which will support active citizenship and community development by providing employment to previously unemployed people who will in turn deliver valuable services to the community.</li> </ul>	<ul style="list-style-type: none"> <li>The North West Centre has previously endeavoured to establish small businesses but have been unsuccessful in this for a variety of reasons, mainly due to financial implications for people moving from benefits.</li> <li>The success of this project will act as a catalyst for other organisations to take a risk and become more self sufficient and independent</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
North West Lifelong Learning Association (NWLLA)	£20,000	<ul style="list-style-type: none"> <li>NWLLA are supportive of the aim identified within the Digital Participation National Plan (2003) to 'getting 60% of those people currently offline, to be online by March 2014'.</li> <li>Salary costs to provide wider access to ICT training including open learning methods, thereby improving the ICT competency and the employability of the beneficiaries</li> </ul>	<ul style="list-style-type: none"> <li>NWLLA will be able to explore social enterprise trading and find the best template possible to allow the charity to generate revenue, thus achieving self sustainability, whilst also ensuring the promulgation of ICT knowledge and participation.</li> <li>Increasing the use of networking using digital media, email and the use of the Internet will feature very much within our plans for the rest of 2010, not only for us, but as a role model for how digital networking can be an important asset to any business, charity, social enterprise or agency.</li> <li>To increase active citizenship within our own boundaries and beyond because so many more people must get used to Information Technologies and how they will form our (very near) future in both personal and business lives.</li> </ul>	<ul style="list-style-type: none"> <li>The use of the Internet to access for government services, to vote, to register for unemployment benefits, to sell, to purchase, to bank - naming just a few facilities people must master to be able to stay economically viable</li> </ul>	<ul style="list-style-type: none"> <li>The organisation has 7 years experience of course content, driven by the needs of particular age groups who have previously used their service.</li> <li>There are 3 main priorities within this grant application which align with the priorities outlined in the UK National Plan for Digital Participation. These are: To help low income families and households to get online. This will give participating adults basic online skills, as well as offering qualifications for work for those who cannot access funding elsewhere; To help fulfil the demand of the older generation and disabled groups for digital skills training and to assist local council authority in their drive to empower trades people to go online and to connect communities within and outside the Borough.</li> </ul>
Northern Ireland Rural Women's Network (NIRWN)	£19,958	<ul style="list-style-type: none"> <li>NIRWN and Women's Resource and Development Agency (WRDA) intend to carry out a pilot research project that will look at the needs of women in both the Fermanagh and Lisburn Council areas.</li> <li>Research will be responsive to the changes associated with RPA.</li> <li>Rural Womens Network will develop a small piece of research into the experience of English women's organisations. Identifying the training needs of women with regards to the challenges of RPA and put in place a planned approach to delivering this training in each area.</li> </ul>	<ul style="list-style-type: none"> <li>A pilot programme and report which can be used for the future strategic development of the women's sector via its investigation of possibilities for the sector in terms of engagement with local government, particularly in the light of forthcoming changes in public administration.</li> <li>Enhanced knowledge of the number and breadth of services that women's groups and the numbers of women taking up these services</li> <li>Increased capacity for women in each area to understand what changes are taking place at local government level and how they can lobby for service delivery</li> </ul>	<ul style="list-style-type: none"> <li>Innovative in working with a rural and urban constituency, sharing the experiences and learning of women in each distinct area. This type of work, in preparing the women's sector for fundamental changes, has not been done before.</li> <li>Develop an understanding between the voluntary/community sector and the public sector in terms of gender.</li> <li>Training and development assessment will be completed to ensure that women can react to change and take up the opportunities these changes may offer.</li> </ul>	<ul style="list-style-type: none"> <li>Complements the work of both NIRWN and WRDA as both organisations are trying to provide a more strategic voice to women, to ensure that they are involved with policy makers when decisions are being taken about major issues which will impact upon women's lives.</li> <li>Complements the training that both organisations provide to women in terms of confidence building and community capacity as the project will help women from both areas to</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
		<ul style="list-style-type: none"> <li>At present there are a number of challenges facing the womens sector in NI e.g. lack of funding. The reduction in funding coming to the sector will challenge the existence of some of these womens groups.</li> </ul>	<ul style="list-style-type: none"> <li>Learning will be shared through the two organisations, their members and local council.</li> <li>Potential extension to other Council areas, using the cluster model</li> <li>Have the capacity, confidence and skills to take the opportunities that possible new structures may offer.</li> <li>Women's organisations can think differently about how they support women in their local community</li> </ul>		<ul style="list-style-type: none"> <li>engage in civic and community life.</li> <li>Complements the work of other community and voluntary organisations such as Rural Community Network, the Rural Support Networks, NICVA and NI Women's Aid Federation.</li> </ul>
Old Library Trust (OLT)	£19,550	<ul style="list-style-type: none"> <li>Project is to extend, develop and formalise partnership to offer a range of alternative routes to improve the health of patients in their choice of community based venues citywide to carry out their cardiac rehabilitation.</li> <li>It will employ exercise referral facilitators qualified up to level 4 BACR Cardiac Rehabilitation and fund training for Level 4 to increase the number of qualified facilitators to 10.</li> <li>Following on from the success of the "Step Up" Level 3 Exercise Referral Programme OLT has identified the need for cardiac rehabilitation in a community outreach base as the current level 3 programme cannot take referrals for CR patients as facilitators need to be trained up to level 4 in order to do this.</li> <li>Derry City Council District is ranked as the 3rd most deprived local government district in NI and is characterised by low income levels resulting in health inequalities and higher levels of poor health</li> </ul>	<ul style="list-style-type: none"> <li>Increase active citizenship and support community development;</li> <li>Develop new ways of working and effective cooperation;</li> <li>Enable the sector to develop and realise an inspiring future vision; and</li> <li>Help create a more independent, confident, risk taking and effective sector.</li> </ul>	<ul style="list-style-type: none"> <li>The "Step Up" Level 4 Cardiac Rehabilitation is playing a key role in restoring the physical, psychological, social and emotional wellbeing of patients.</li> <li>Benefits for the patient include: increased choice via self-management plans, independence and awareness of services available, reduction in outpatient and GP appointments and access to other services for patients</li> </ul>	<ul style="list-style-type: none"> <li>Cardiovascular disease is one of the biggest causes of death and disability in NI</li> <li>The NI Cardiovascular Health &amp; Well-being Service Framework calls for all patients requiring cardiac rehabilitation, in line with regional guidelines, to be offered it, but no targets as of yet.</li> <li>Cardiac rehabilitation gives heart attack patients a 26% greater chance of surviving in the five years following their diagnosis by providing them with the vital skills to manage their condition and significantly improves their quality of life.</li> <li>The project will compliment this framework as it will research and design a "Step Up" Level 4 CR programme offering patients the opportunity to be actively engaged in their own medical recovery in their own community bases</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
Opportunity Youth	£20,000	<ul style="list-style-type: none"> <li>Develop Partnerships with organisations in the UK that are / will be delivering commissioned contracts of front line community services;</li> <li>Examine appropriate ways of engaging the private sector in the current climate;</li> <li>Undertake an internal investigation of costs and develop a range of options to deliver certain corporate functions more efficiently and effectively;</li> <li>Investigate the potential development of a cross sector partnership that could deliver future youth related contracts across NI ensuring value for money and prevent competition between a range of regional youth agencies.</li> <li>Opportunity Youth identified that there is a need to maximise opportunity in advance of RPA as no other organisation is endeavouring to explore these opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Extensive investigation conducted into establishing collaborative working partnerships</li> <li>Development of at least one collaborative working partnership</li> <li>A comprehensive exploration exercise conducted to assess the potential of private sector organisations having greater proactive involvement in the work of the third sector</li> <li>An exploration exercise Carried out to assess the viability of implementing a social enterprise ethos across entire Opportunity Youth business model</li> </ul>	<ul style="list-style-type: none"> <li>Garner the support of the Private and Third sectors in developing an effective partnership to prepare for the imminent arrival of commissioned services - through practical and professional mentoring, partnership work and advice</li> </ul>	<ul style="list-style-type: none"> <li>Opportunity Youth is committed to delivering positive change to its service users.</li> <li>Complement the following strategies/plans: RPA, DEL - Skills through Training, DE - Priorities for Youth (not yet published), Extended/Full Service Schools and Formation of ESA through RPA, DHSSPS - New Strategic Direction for Alcohol and Drugs, Protect Life - the NI Suicide Prevention Strategy and Care Matters, Department of Justice Strategy for the Prevention of Offending by Children and Young People in NI, Strategy for the Management of Women Offenders, Blueprint the NI Prison Services Strategy for Long Term Change, NI Strategy for Reducing Re-Offending, DSD - Neighbourhood Renewal, The Charities (Northern Ireland) Order 2007, OFMDFM - Ten Year Strategy for Children and Young People and Non Government - European Funding, Building Sustainable Prosperity(BSP), Peace III, National Lottery</li> </ul>
Royal Mencap Society	£20,000	<ul style="list-style-type: none"> <li>Mencap have noted that current premises are no longer fit for purpose and a new building is urgently required.</li> <li>Premises restrictions have led to commitment amongst Mencap and their partner organisations to moving toward mutually beneficial co-located premises enabling each organisation to provide an enhanced, more</li> </ul>	<ul style="list-style-type: none"> <li>A detailed governance structure forming the basis for sustainable, strategically aligned partnership working in co- located setting.</li> <li>Enable partner organisations to take co-operation to new level of effectiveness &amp; to fully realise vision for early intervention; basis for enhanced sectoral effectiveness as all partners achieve aims more efficiently</li> </ul>	<ul style="list-style-type: none"> <li>Early intervention for children with disabilities is largely untried in UK. Isolated examples of transdisciplinary provision for single client group (egMencap's Segal House for children with a learning disability) demonstrate improved outcomes.</li> <li>Extends new collaborative provision</li> </ul>	<ul style="list-style-type: none"> <li>All partners believe with relocating together existing partnerships are strengthened and developed by sharing premises and resources.</li> <li>With the current economic climate organisational running costs will be reduced and</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
		<p>cost-effective and therefore sustainable service.</p>	<ul style="list-style-type: none"> <li>• A clear, sustainable final partnership agreement</li> <li>• A cost-benefit analysis of co-location versus separate operation, based on I&amp;E audits &amp; projections for partner organisations; interacting with analysis of added value for service delivery of co-location; enabling informed assessment &amp; decision-making. Partners thus establish most effective ways to collaborate, &amp; decide on actions (including risk-taking as appropriate) on basis of full information</li> <li>• Service model for co-located delivery of early intervention services (including details of complementary/shared provisions; specialism's offered). Enabling full elaboration of early intervention vision &amp; providing foundation for maximising effective collaboration in realising it</li> <li>• Specifications for premises &amp; most accessible location for co-located service delivery (informed by analysis of joint &amp; distinct needs of partners' clients). Basis for effective collaboration in sustainable, high- quality delivery of vision; hence for maximising achievement of goals for all partners across sector</li> </ul>	<p>by partners with different client groups - sharing expertise &amp; approaches of benefit to children with a range of diagnostic labels but restricted to single groups if organisations with relevant specialisms operate in isolation.</p>	<p>duplication of resources minimised by sharing training /meeting rooms and equipment and income will be generated through hiring of training/meeting rooms/equipment</p> <ul style="list-style-type: none"> <li>• Partners will gain experience and confidence in collaborative working through developing and marketing training modules for use across partner organisations and with external organisations.</li> </ul>
Springfield Charitable Association	£20,000	<ul style="list-style-type: none"> <li>• Carry out options appraisal/economic appraisal validating the need for a social economy enterprise that will provide day centre care, night care, step-down care incorporating a dementia centre of excellence</li> <li>• It will satisfy a wider need in dementia care and will become the first ever Night-Care facility in Belfast.</li> </ul>	<ul style="list-style-type: none"> <li>• Options and Economic Appraisal that will test the validity of a Social Economy Enterprise.</li> <li>• Developing new ways of working it is completely about Social Innovation.</li> <li>• Springfield Charitable Association will work with the Public Sector, Academia and the 3rd Sector to realise an inspiring future vision of Older People's Care and help create a more independent, confident, risk taking sector.</li> </ul>	<ul style="list-style-type: none"> <li>• Springfield Charitable Association intends to utilise all and collaborate within any organisation that has a view on the future of Older People's Service. Also to put Social Innovation to a rigorous test, to see if the 3rd sector can be dynamic and innovative.</li> </ul>	<ul style="list-style-type: none"> <li>• The resulting information from the Appraisals will form the basis of SCA strategy for the next 5 years</li> </ul>
The Village Garden Broughshane -	£20,000	<ul style="list-style-type: none"> <li>• Aim is to proactively encourage cluster groups to work smarter, better and in a more collaborative and innovative manner and by</li> </ul>	<ul style="list-style-type: none"> <li>• Development of a unique and innovative model of working that will involve a developing partnership between a cluster of community</li> </ul>	<ul style="list-style-type: none"> <li>• Partnership arrangement with eight rural organisations coming together to add strength to each other and to</li> </ul>	<ul style="list-style-type: none"> <li>• The proposal is based on the Cluster strategy, the focus of which is on partnership and joint</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
on behalf of BERCC		<p>doing so to identify new ways of working between the sector and other statutory, voluntary and private bodies and which would improve service delivery in the area.</p> <ul style="list-style-type: none"> <li>In early 2010 the groups recognised that cuts were imminent and that joint and collaborative working was required in order to meet the needs of the community. This resulted in the development of the 4 mini clusters within Ballymena covering the whole area. From this each mini cluster was consulted and identified the specific needs of their local areas. The needs of the elderly followed by those of young people were the priorities in this area.</li> </ul>	<p>groups and statutory sector organisations and service providers.</p> <ul style="list-style-type: none"> <li>Development of a model of good practice delivering cross sectoral projects involving younger and older people across a large geographical basis that can be easily replicated by other areas.</li> <li>Development of a steering/learning network to include RCN, Volunteering Now, CENI, NEELB, Ballymena Borough council, Age NI, PSNI, NINE and from which learning can be shared. The other clusters would be able to see how the project is progressing and to learn from it.</li> <li>Delivery of service provision in a more effective and efficient way which will target the needs of the rural community.</li> <li>Shared learning, sharing of skills and knowledge transfer between and within the cluster groups.</li> <li>Economies of scale which will be achieved through joint and collaborative working.</li> <li>Sustainability of the cluster through time invested in relationship building and member training and development.</li> <li>Development of a long term strategy for the cluster that will ensure the future sustainability.</li> </ul>	<p>address their shared issues in an efficient and effective way. The main focus of exploring modes of joint working.</p> <ul style="list-style-type: none"> <li>It is an innovative model as it is the first of its kind linked to a Council and a community planning concept within Ballymena Borough in which four community clusters have been established, two urban and two rural. The models of practice and the exploration for the delivery of services to communities that will be implemented by this Cluster can be replicated by the other three clusters and or across other council areas.</li> <li>It is preparing groups for RPA, enabling them to explore new ways of working, allowing for a more integrated approach to how services are delivered within their communities.</li> <li>This will benefit the rest of the sector through the development of a model of good practice that other organisations can learn from.</li> <li>The establishment of a steering/learning network to include RCN, Age NI, NEELB youth services, PSNI, will ensure added value around the learning from these collaborative projects.</li> </ul>	<p>working between and across the defined geographical areas. This will complement the following plans/strategies:</p> <ul style="list-style-type: none"> <li>The community Support Plan as it encourages networking and the exploration of areas of joint working and service delivery.</li> <li>It complements the concept of Community Planning and the delivery of services.</li> <li>It embeds Good Relations strategies and Peace III strategy, building relations at local level. The Cluster has established cross community relationships and the proposal will encourage further development and strengthening of these relationships.</li> <li>It complements the Health and Well Being Strategy for Older People (2006 -2016) which has identified that older people want care, support and treatment in or close to their homes.</li> <li>An important element within the HSCB Commissioning Plan is a shift to support older people in their homes and to give communities greater control over the range and delivery of services. The Commissioning Plan acknowledges the need to build on investing for health partnerships that encourage a healthy ageing agenda addressing key issues such as isolation, fuel poverty, and the need for improved transport</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
					<p>services, which are areas within will be addressed.</p> <ul style="list-style-type: none"> <li>• It links and fits in with the Assembly 'Shaping our Future Strategy 2005' and the Public Health Agency Mental Health Strategy.</li> <li>• The project can have the potential to contribute the Northern Ireland Public Policy for Older People and Volunteering project which aims to raise awareness of the benefits to the health and well-being of older people through volunteering.</li> </ul>
Ulster Cancer Foundation	£18,694	<ul style="list-style-type: none"> <li>• The aim of the project is to consider working in partnership with smaller cancer charities throughout NI in response to community needs. Ulster Cancer Foundation would like to build a model of working with smaller charities - in effect to deliver a central charity working with smaller community based charities. This would provide useful learning for charities that are considering new approaches but are perhaps concerned about being 'taken over'.</li> <li>• Offers an opportunity to use the role of small charities as a strength. It would also be cost effective by allowing UCF to have a wider local presence without committing resources and duplicating effort.</li> </ul>	<ul style="list-style-type: none"> <li>• It contributes resourcing new ways of working and effective co-operation through the following outcomes:</li> <li>• A written model outlining the potential for joint working arrangements between a larger regional charity and small community based charities, sufficiently flexible to suit a range of expectations.</li> <li>• Proposals that will outline the potential benefits of arrangements including benefits to cancer patients and the organisations that works with them. Examples may include provision of cancer information, liaison with local cancer patients and cost savings of joint working.</li> <li>• Agreement of charities to work together in the future including how existing services might work together and issues such as sharing volunteer effort and joint fundraising initiatives are resolved.</li> <li>• Organisational learning and written model for collaboration with potential application to voluntary organisations beyond the cancer</li> </ul>	<ul style="list-style-type: none"> <li>• This project will try to address what may become a viable alternative for a large part of the sector — formal partnerships/collaborations between large central charities and local groups.</li> </ul>	<ul style="list-style-type: none"> <li>• UCF's strategy 2005-2009 (subsequently extended to 2010) included the key objectives of developing outreach services, develop a network of support groups, targeting cancer prevention on hard to reach groups and partnership working. In addition, Regional Cancer Framework: Targets smoking and healthy lifestyles especially among younger people, improved information on causes and symptoms of cancer to promote early detection. Also, investing for Health stresses the need to tackle health inequalities and tobacco strategy targets prevention and smoking cessation particularly among manual workers and lower socio-economic groups.</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
			support sector <ul style="list-style-type: none"> <li>Actual agreement by one local charity to work with UCF</li> <li>An innovative model for extending specialist support services to hard to reach groups using sound community development principles.</li> </ul>		
Ulster Community Investment Trust (UCIT)	£18,000	<ul style="list-style-type: none"> <li>The proposed project will involve the development of a needs analysis on the establishment of a new Public Procurement Brokerage Service that would help not for profit social enterprise organisations successfully tender for public service contracts. It is anticipated that PPBS would act as a one-stop-shop for social enterprises throughout Northern Ireland, building their business capacity, identifying procurement opportunities, and guiding them through the tendering process to win public service contracts and ultimately reduce the sector's dependency on grant funding.</li> </ul> <p>The project will involve three key pieces of research:</p> <ul style="list-style-type: none"> <li>An assessment of the procurement opportunities currently available to the sector, including the approach taking by the public sector to advertise contracts and average size of contracts;</li> <li>An assessment of the sector's readiness to avail of procurement opportunities, to include the development of a skills competency framework and subsequent analysis of the skills and business capacity of a sample of 100 social enterprises at different stages of the business growth cycle, and opportunities for collaboration;</li> <li>Mapping the procurement process in the Central Procurement Directorate (CPD); NI Departments and local councils.</li> </ul>	<ul style="list-style-type: none"> <li>Opportunities: One part of the final report will map the public procurement process with 10+ officials at all levels of government and identify existing procurement opportunities for social enterprises. An interim report will be presented at a public seminar to provide an overview of the procurement marketplace, including examples of successful social enterprise led public service contracts and a sample of potential public service contracts available to the sector. Skills Set/Mind Set: A skills competency framework will be developed to identify key skills gaps within the social economy and the sector's readiness for procurement opportunities. A second key part of the final report will detail the business capacity of a sample group of 100+ social enterprises. A second public seminar will be held to present the findings and recommendations of an interim report.</li> </ul>	<ul style="list-style-type: none"> <li>The project is innovative as it has the potential to improve the sustainability of social enterprises by increasing access to a large stable public sector marketplace.</li> </ul>	<ul style="list-style-type: none"> <li>The recent Northern Ireland Assembly Finance &amp; Personnel Committee Report on the Inquiry into Public Procurement in Northern Ireland (Feb 2010) made 41 recommendations to improve public procurement policy and practice, many of them focused on facilitating access for social enterprises.</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
Volunteer Now	£19,300	<ul style="list-style-type: none"> <li>• Volunteer Now and CO3 wish to design and pilot a dispute intervention programme to support third sector organisations faced with interpersonal conflict and crisis.</li> <li>• The programme will involve experienced volunteers, supported by staff and an expert steering group. The programme will provide expert training in governance, mediation, finance, PR and mentoring skills. Experience of Volunteer Now and CO3 is that a small number of Northern Ireland's voluntary sectors encounter a major crisis involving conflict between trustees and staff or the chief officer and senior staff. The impact of a third sector organisation in crisis can be significant both for the organisation and its beneficiaries but also for the sector as a whole.</li> <li>• There is no service currently in place to tackle this issue, particularly one which focuses on both trustees and staff.</li> </ul>	<ul style="list-style-type: none"> <li>• A team of 6 volunteers will be recruited and trained as mediator mentors.</li> <li>• Organisations will be offered a crisis intervention service.</li> <li>• CO3 and Volunteer Now will have expertly explored and learnt from an approach to a long standing and difficult issue of strategic consequence to the NI's Third Sector.</li> <li>• CO3 and Volunteer Now will disseminate the learning from this pilot project.</li> <li>• CO3 and Volunteer Now will have considered business options to develop this service in the future.</li> </ul>	<ul style="list-style-type: none"> <li>• The proposed project is an innovative response and a new service designed to address issues such as public sector cuts and the external change environment.</li> </ul>	<ul style="list-style-type: none"> <li>• The CO3 Corporate Plan 2010 — 2013 includes an Outcome statement which states the following, 'CO3 members will have the resources to prevent or address organisational moments of crisis' and this project widens the way in which CO3 will achieve this outcome. Volunteer Now is about to embark on a process of strategic planning as a result of the recent merger. This process will include looking at how the organisation can support volunteers involved in governance and this project will assist in providing this support. In addition, The Volunteer Strategy is due to be published in Autumn 2010 and the consultation document identified the support needs of volunteers in management committees for particular attention over the period of the implementation of the Charity Legislation. This project will assist in providing this support.</li> </ul>
YouthNet	£12,174	<ul style="list-style-type: none"> <li>• Following an extended period of consultation with its membership and other stakeholders, Youthnet has been mandated to develop a revised strategy that will include: a new regional and sub-regional stakeholder structure that will: facilitate more effective representation and collaborative working; develop collaborative support structures; and ensure more effective use of shared</li> </ul>	<ul style="list-style-type: none"> <li>• Comprehensive bank of data in relation to representation, support, collaborative practice and Communication and ICT requirements.</li> <li>• Identified models for representation, support, collaborative practice and Shared learning and Resources.</li> <li>• Future resource requirements identified.</li> <li>• Voluntary Youth Sector strategy for future implementation.</li> </ul>	<ul style="list-style-type: none"> <li>• The project seeks to develop a new flexible and responsive structure which will meet the long term needs of the voluntary youth sector. Its focus on co-operation, collaboration, shared resources and inclusion of smaller groups aims to create a model of effective practice with the potential for replication across the not-for-profit</li> </ul>	<ul style="list-style-type: none"> <li>• This project will develop a strategy for the voluntary youth network and will inform and be complementary to Youthnet's future plans and strategies. The Strategy will also inform the future resourcing of the voluntary youth sector through Youth Council for Northern</li> </ul>

Name of Organisation	Project Cost	Overview / Need of Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Complementary of the Proposed Project
		<p>resources, shared-learning-and joint service delivery.</p> <ul style="list-style-type: none"> <li>The process will be a consensus-led process achieved through detailed consultation with stakeholders which will provide essential baseline information to ensure that the resulting strategy identifies future models that are representative, achievable, responsive and take account of existing skills and expertise. Consultation will take place through a series of sub-regional and regional events, stakeholder and interest group surveys.</li> </ul>	<ul style="list-style-type: none"> <li>The project meets the trust's aim of supporting: projects which have the potential to be shared with and influence the wider sector and other stakeholders including the Trust itself and projects which explore new models of financing, structure and development within the sector.</li> </ul>	<p>sector. The proposed model is also to engender shared learning and enhance communication between organisations.</p>	<p>Ireland (YCNI) and the Education and Library Boards (ELB'S).</p>
<b>Total</b>	<b>£522,490</b>				

## Appendix IV: Deliver Change Programme - Overview of projects proposed

Applicant	Town	Amount Requested	Overview of Project	Need for the Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Sustainability
Age NI	Belfast	£50,000	<ul style="list-style-type: none"> <li>Connecting Well for later life aims to adopt a transformative approach to addressing current inequalities in older peoples health and well-being across NI and the role of the Age Sector in bringing about effective and lasting change in its approach to the development and delivery of Health and Well being activities for older people.</li> </ul>	<ul style="list-style-type: none"> <li>In a series of engagement events carried out by Age NI with over 500 older people (March - June 2010), 87% of older people cited well-being as the most important element of positive ageing.</li> <li>Emerging needs have been identified through external evaluation by Community Evaluation NI, Social Capital research carried out in year 3 of the project, a SWOT analysis carried out with beneficiaries and partners in Year 4, and focus group sessions with more isolated groups and non -users.</li> </ul>	<ul style="list-style-type: none"> <li>The project aims to build the capacity of communities to take responsibility for the delivery of health focussed initiatives for older people in the longer term, based on increased collaboration and engagement with statutory agencies, having increased capacity to negotiate for the use of facilities for older people, and being empowered to lead the way in developing a new model of collaborative working which can be replicated across other sectors</li> </ul>	<ul style="list-style-type: none"> <li>The project is dedicated to collaborative working aligned anticipating future change emerging from RPA and promoting best practice as opposed to the more traditional one-to-one localised community development model</li> <li>The project will adopt a new capacity building training which combines collaborative working and fundraising skills through an action learning approach for groups.</li> </ul>	<ul style="list-style-type: none"> <li>An integral part of the project is skilling the age sector in fundraising and collaborative work for sustainability. SROI will provide evidence of the added value of health and well-being programmes for older people which it is anticipated will highlight the positive impact and hence enhance the sustainability of such work for statutory agencies.</li> </ul>
Ashton Centre	Belfast	£58,200	<ul style="list-style-type: none"> <li>The aim of the project is to set up a development company to acquire and develop vacant or derelict properties centre for third sector organisations</li> </ul>	<ul style="list-style-type: none"> <li>Demand for the centre is based on the number of enquires received to date. In 2009, Landmark East carried out an initial feasibility into the idea which confirmed such demand.</li> <li>Most of this interest came from organisations who were in unsuitable premises, often requiring difficult and expensive modernisation to make them more effective and/or suitable for disabled access.</li> </ul>	<ul style="list-style-type: none"> <li>More effective third sector organisations through participating in the project</li> <li>More effective delivery of services and other community benefits by participating organisations</li> <li>A higher positive profile for the third sector</li> <li>A new financial model of delivering third sector goals</li> </ul>	<ul style="list-style-type: none"> <li>Ethical Property is based on the core values of fair and transparent business practice, social and environmental accountability, and encouraging progressive and innovative social change.</li> <li>Organisations will have the opportunity to become investors and direct stakeholders in the developments while making a direct contribution to civic regeneration.</li> </ul>	<ul style="list-style-type: none"> <li>Ashton Centre have identified that the project will continue to provide benefits and outcomes beyond the life of the funding.</li> <li>The new centres will provide regeneration outcomes as well as the benefits to tenants and investors long beyond the life of the Building Change Trust.</li> </ul>

Applicant	Town	Amount Requested	Overview of Project	Need for the Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Sustainability
Autism Initiatives NI	Belfast	46,855	<ul style="list-style-type: none"> <li>The aim of the project is to develop innovative services for people with autism in NI.</li> </ul>	<ul style="list-style-type: none"> <li>There is a need for more informal services to be developed which increase the social and leisure opportunities for people with autism and their families.</li> <li>It is estimated that 1% of the population is on the autistic spectrum. Just over half of people with autism also have a severe learning disability.</li> <li>The special needs associated with autism mean that many people with the condition find it difficult or even impossible to access mainstream services. At present there is a real shortage of services for people with autism.</li> </ul>	<ul style="list-style-type: none"> <li>The project will provide social opportunities for people with autism, information for adults with autism and their carers, and opportunities for volunteers to work with our service users.</li> <li>A key outcome will be the establishment of a new charity to house these activities -separate from direct social care activities.</li> </ul>	<ul style="list-style-type: none"> <li>The most innovative aspect of the programme is the commitment to self-financing. The project will seek ways to develop its services in a sustainable way once it has been established. The project will also consider the correct legal form in order to help with sustainability.</li> </ul>	<ul style="list-style-type: none"> <li>Autism Initiatives will continue to provide support to the project by seconding an Assistant Director to be Project Director for the programme. This is an ongoing commitment.</li> </ul>
Coleraine Rural & Urban Network	Coleraine	£49,966	<ul style="list-style-type: none"> <li>Causeway Rural and Urban Network as lead partner represents a consortium of five organisations who provide a range of services to 135 community groups within the causeway area.</li> <li>The proposed project is to create a two year part time post of Social Economy &amp; Sustainability Development Officer for the development of our socio-economic business 'Coleraine Community Hub'. The post holder will come from a business/finance background and will assist with the development of our partnership and the socio-economic business.</li> </ul>	<ul style="list-style-type: none"> <li>The need for the project is based on the fact that the consortium of five organisations all have differing aims, objectives and resource requirements are coming together to be part of a community hub.</li> <li>In addition, the Network need to participate in a process where they will facilitate the ongoing development and capacity of a healthy partnership with a cohesive vision for the future sustainability of the social economy business that is being created through this collaboration.</li> </ul>	<ul style="list-style-type: none"> <li>The outcomes of the project will include the strategic development of new models for financing, structure and development for the partnership members in the Community Hub Project</li> </ul>	<ul style="list-style-type: none"> <li>The project is innovative because it is addressing a number of identified issues for the voluntary and community sector. These include:               <ul style="list-style-type: none"> <li>- The Economy;</li> <li>- Short Term Funding Programmes;</li> <li>- Competitiveness Between Organisations Competing for Dwindling Resources;</li> <li>- Impact of Government Policies;</li> <li>- The need to Professionalise Service Delivery;</li> <li>- Community Relations; and</li> <li>- Managing Collaboration, Partnership Working and Mergers Between</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Through implementing the project the partnership will have ensured that their organisations will be sustained beyond the period of funding.</li> </ul>

Applicant	Town	Amount Requested	Overview of Project	Need for the Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Sustainability
Foyle Multicultural Forum	Derry	£50,000	<ul style="list-style-type: none"> <li>The One World Resource Centre is currently the new home of: Foyle Multicultural Forum, Seeds and Polish Abroad.</li> <li>The "consortium" wishes to launch the 'Opening Doors' project with the aim of maintaining and developing a multifunctional support network for the BME communities in the North West.</li> </ul>	<ul style="list-style-type: none"> <li>There is limited support infrastructure in place to assist both well established and more recently arrived migrant and BME new established groups, to cope with the challenges posed by living in a foreign environment and/ or the challenges of becoming part of the wider community.</li> </ul>	<p>The proposed project addresses all the aims of the BCT:</p> <ul style="list-style-type: none"> <li><b>Increase active citizenship and support community development:</b> The One World Resource Centre increases active citizenship as it gives BME communities a sustainable space: to carry out their activities, to receive support, to get information, to become stronger and to socialise.</li> <li><b>Develop new ways of working and effective cooperation</b> The One World Resource Centre project will bring several groups together.</li> <li><b>Enable the sector to develop and realise an inspiring future vision</b> It is envisaged that the One World Resource Centre will inspire organisations operating in the social sector to start social enterprises and is expecting to support the creation of 4 social enterprises and consequently creating 15 to 20 new jobs while meeting social needs.</li> <li><b>Help create a more independent, confident, risk taking and effective sector</b> Projects are carried out in cooperation, without losing identity. It is envisaged that this new way of operating will inspire</li> </ul>	<p>organisations and Fluctuations in staff and volunteers (NICVA State of the Sector V).</p> <ul style="list-style-type: none"> <li>The proposed concept brings groups together in order to maximise and share resources.</li> </ul>	<ul style="list-style-type: none"> <li>The organisations managing the centre are confident the centre will be able to receive further funding either for projects or core costs in future applications.</li> <li>In addition, the centre will be charging organisations with funding, wishing to use the centre and its facilities in order to generate an income.</li> </ul>

Applicant	Town	Amount Requested	Overview of Project	Need for the Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Sustainability
					other organisations operating in the sector.		
Gingerbread NI	Belfast	£49,976	<ul style="list-style-type: none"> <li>The aim of the project is to appoint a Business Development Manager to adapt existing products and develop new ones to take advantage of market opportunities.</li> </ul>	<ul style="list-style-type: none"> <li>Gingerbread have identified that they anticipate a negative settlement for NI public expenditure for the next 3 year Comprehensive Spending Review. As such, this will require the sector to have a high level of flexibility, adaptability and vision to respond to an increasing competitive and uncertain funding environment.</li> <li>As a result Gingerbread seek to appoint an experienced business professional who will use their commercial skills to drive the business forward by exploiting new opportunities for growth.</li> </ul>	<ul style="list-style-type: none"> <li>Recruitment of Business Development Manager</li> <li>Development of new products/markets some of which will directly promote the development of the sector</li> <li>Deliver new products to develop new ways of working and create a more confident and effective sector</li> <li>Review, evaluate and disseminate best practice models within the sector which will support community development and encourage a more independent and effective sector.</li> </ul>	<ul style="list-style-type: none"> <li>The project will contribute to the upskilling of key people within the sector using a specially designed coaching and mentoring programme. Coaching and mentoring will promote adaptability and the ability to manage change, essential skills in an increasingly uncertain environment.</li> <li>The project also offers the opportunity to explore best practice in the development of social enterprise, an area of increasing interest and importance within the sector.</li> </ul>	<ul style="list-style-type: none"> <li>The primary objective of the project is to deliver sustainability for Gingerbread's social enterprise, Possibilities NI and, in turn, to improve the sustainability of Gingerbread NI itself.</li> </ul>
Habitat for Humanity NI	Belfast	£49,220	<ul style="list-style-type: none"> <li>Habitat for Humanity propose to deliver an integrated cross sectoral programme which will promote better outstanding of the challenges being faced by Eastern European immigrants in NI &amp; lead to amorecohesive, shared &amp; integrated society.</li> <li>This project consists of three strands and will increase active citizenship by utilising Habitat's experience of bringing together more than 15,000 volunteers from different geographical, socio-economic and religious backgrounds.</li> </ul>	<ul style="list-style-type: none"> <li>Despite concerted efforts by a range of groups and the significant progress which has been made in NI to tackle racism and hate crime in recent years, ongoing intimidation and violence towards eastern European immigrants highlights the challenge faced in promoting cohesion, sharing and integration.</li> <li>Despite the non-local population in Northern Ireland standing at 1%, current PSNI statistics show an average of 20 racist attacks each week, largely centred in loyalist communities.</li> <li>Also, according to a 2007 University of Ulster report</li> </ul>	<ul style="list-style-type: none"> <li>30 young unemployed people from local communities associated with racism will gain a better understanding of the impact of sectarianism and racism by undertaking training locally and having the opportunity to participate in Big Build 2011 in Romania.</li> <li>30 young unemployed people from local communities associated with racism will gain a better understanding of the poverty and issues faced by communities in Romania and Poland.</li> <li>30 young unemployed people from local communities associated with racism will be</li> </ul>	<ul style="list-style-type: none"> <li>This project directly addresses a number of themes including racism, community relations, community development, self-help, and increasing cross-sectoral and collaborative working.</li> <li>Habitat's work specifically addresses community relations through housing and volunteerism. There is significant scope for other community sector organisations to develop their work across sectors and address a number of live issues.</li> </ul>	<ul style="list-style-type: none"> <li>Benefits/outcomes will be sustained in a number of ways which include:               <ul style="list-style-type: none"> <li>A deepening of the impact and strengthened relationships will lead to new collaborations and new ways of working.</li> <li>The 30 young people who participate in the construction skills programme will both be better placed to seek employment and also be more informed and understanding to the issues faced by immigrants.</li> <li>Conducting an external evaluation will position Habitat to develop similar</li> </ul> </li> </ul>

Applicant	Town	Amount Requested	Overview of Project	Need for the Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Sustainability
				surveying 32,000 people in 19 European countries, Northern Ireland has the highest proportion of bigoted people in the Western world.	empowered to become active citizens through a tailored construction and life skills programme designed to increase employability. <ul style="list-style-type: none"> <li>60 People from local communities will gain a better understanding of the issues faced by immigrants though participation in a tailored community relations programme</li> </ul>		programmes which combine a number of community development issues and have long lasting impacts.
Holywell Trust	Derry	£50,000	<ul style="list-style-type: none"> <li>Holywell Trust is the lead partner of the Walled City Community Partnership (WCCP). Formed in 2007, the WCCP is a group of 11 community organisations that have pledged to join resources and ideas under a shared ethos and common objective of working towards the social regeneration of the Walled City.</li> <li>Holywell Trust is seeking support for is the further development of the WCCP, the creation of programmes which connect this partnership with other organisations, and the recording of these processes.</li> </ul>	<ul style="list-style-type: none"> <li>To complement the process of the physical re-building of 8-14 Bishop Street</li> <li>To complement the work of the various organisations involved in- the Derry- Londonderry 'City of Culture' bid — New Lights from Old Gates.</li> <li>To ensure that the community and voluntary sector is placed centrally in all development processes for the city and beyond.</li> <li>To ensure the long-term sustainability of the projects involved in the partnership building processes.</li> <li>To share services including administration, finance, and jointly managing the project.</li> <li>To record the complex processes of partnership — building as shared learning.</li> <li>To develop an innovative collaborative culture.</li> </ul>	<ul style="list-style-type: none"> <li>The consolidation of the WCCP</li> <li>A new fit for purpose community building</li> <li>Increased collaboration between groups leading to improved services</li> <li>The development of strong , robust structures for management</li> <li>New methods of financing and supporting the sector</li> <li>Reduced competition between the sector</li> <li>Development of new models of working reflecting our changing society</li> <li>The promotion of the local community &amp; voluntary sector as key professional element in society</li> <li>Derry /Londonderry city centre will be revamped as the Walled City Neighbourhood a place of inclusion and celebration of diversity — a DIVERSECITY</li> </ul>	<ul style="list-style-type: none"> <li>The WCCP have agreed to work together with a common ethos to bring about change and sustainability in the sector. The process is being recorded so that it can be a model for other organisations</li> </ul>	<ul style="list-style-type: none"> <li>By the end of the project there will be rental income generated from the new building. This will sustain Holywell Trust as a landlord organisation. Staff roles and responsibilities will change accordingly.</li> </ul>
New Life Counselling Service	Belfast	£50,000	<ul style="list-style-type: none"> <li>The aim of the proposed project is to run a 2 year pilot programme for the development and delivery</li> </ul>	<ul style="list-style-type: none"> <li>NLC have identified that the Post Qualifying course is needed as there is nowhere else in NI where this level of</li> </ul>	<ul style="list-style-type: none"> <li>Production of a highly skilled and qualified staff of practitioners who can deliver the highest possible standards of counselling and</li> </ul>	<ul style="list-style-type: none"> <li>This programme is innovative in that it is the first of its type to be available in NI and it</li> </ul>	<ul style="list-style-type: none"> <li>NLC have identified that the the programme will be a sustainable resource once funding ceases. The</li> </ul>

Applicant	Town	Amount Requested	Overview of Project	Need for the Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Sustainability
			and availability of Post Qualifying Diploma in Psychotherapy for Children and Young People.	<p>training can be accessed for counsellors and practitioners who specifically work with children and young people.</p> <ul style="list-style-type: none"> <li>Senior clinical managers have identified that there is a need for more specifically qualified therapists to work with children and young people. Similarly some of less experienced counselling staff have identified within the appraisals and training plans that they would benefit from more bespoke training to aid their practice development.</li> </ul>	<p>therapeutic support to young clients.</p> <ul style="list-style-type: none"> <li>Increased recognition of the counselling sector and recognition for regulation purposes.</li> <li>Accessible training for counsellors with children and young people (both internal and external to New Life Counselling) hence having a major impact on service delivery across NI.</li> <li>Trainees receiving a post graduate level qualification in child &amp; adolescent psychotherapy.</li> <li>Increased skilled workforce to service the growing need for psychological therapies. In terms of achieving the aims of the BCT this project will:</li> <li>Starting a social enterprise: delivery of this programme following the pilot will be self funding;</li> <li>Increased organisational effectiveness through improved training;</li> <li>Implementation of a training and skills development strategy on an organisational basis and a focus on high quality service delivery within the sector.</li> </ul>	encourages a change of approach to therapeutic training.	individuals trained within the pilot will be retained within the organisation and as such the knowledge and skills learned will enable the development of NLC services to children and young people.
NI Youth Forum	Belfast	£50,000	<ul style="list-style-type: none"> <li>NIYF wish to explore the potential to create a real, and formal cross sectoral partnership that will seek and secure service and programme delivery contracts within the Youth Sector.</li> </ul>	<ul style="list-style-type: none"> <li>In order to address the pending budget cuts and changes in government policy direction, NIYF have aligned themselves with strategic partners through the Future Builders Consortium.</li> <li>The joined up approach to contracted services has secured</li> </ul>	<ul style="list-style-type: none"> <li>To become 75% self reliant by securing contracts and services work;</li> <li>conducted an internal financial management and governance review;</li> <li>Formal partnership developed between the Youth Forum and</li> </ul>	<ul style="list-style-type: none"> <li>The projects innovation is centred on the development of an innovative partnership that will secure the work of the Youth Forum in the longer term.</li> <li>The Youth Forum wish to maximise its capacity to</li> </ul>	<ul style="list-style-type: none"> <li><b>Future builders:</b> The core focus of the consortium is to deliver front line services through commissioned contracts thus reducing the reliance on public funding. All income will be self generated</li> </ul>

Applicant	Town	Amount Requested	Overview of Project	Need for the Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Sustainability
			<ul style="list-style-type: none"> <li>NIFY wish to extend and enhance the work of the NIYF within the sector through the growth of a recently established Social Enterprise. Accepting the impending budget cuts and retrenchment, Youth Forum seek to become 75% self reliant through securing of contracts by 2014.</li> </ul>	<p>the consortium Peace III contracts totalling almost £400,000. Such has been the success of the partnership approach to date, NIYF have identified the need to consolidate this arrangement and establish formal partnership agreements, governance structures and financial procedures to ensure best practice partnership working and effective delivery of contracted services.</p>	<p>Future Builders Consortium;</p> <ul style="list-style-type: none"> <li>Bespoke research and analysis exercise conducted to examine potential best practice partnerships;</li> <li>Examine existing partnership structures across the UK for guidance on governance &amp; policy;</li> <li>Audit of existing and potential contracted services conducted and presented to NIYF;</li> <li>2 contracted services contracts in the youth sector successfully secured;</li> <li>To become 30% self reliant from contracted services;</li> <li>Organisational review conducted through commissioned services;</li> <li>2 best practice visits conducted to examine best practice across the UK;</li> <li>Consultation exercise conducted to assess the views and opinions of young people regarding changes to the organisation;</li> <li>Ongoing interactive consultation with young people method conducted to enable formative monitoring and evaluation of services.</li> </ul>	<p>develop and deliver contracted services through a range of providers and partners thus transforming their business model and internal processes.</p>	<p>ensuring full sustainability for the Future Builders consortium.</p> <ul style="list-style-type: none"> <li><b>NIYF:</b> The Forum will achieve enhanced and improved sustainability post the award period through four key areas:           <ul style="list-style-type: none"> <li>Its central role within the Future Builders consortium and the potential to generate income through securing contracts and service delivery (as a partnership)</li> <li>Its engagement with the Private Sector will allow the Forum to tap into an area that hasn't really been explored to date</li> <li>The newly established social economy business will enable to Forum to secure and deliver youth work / services with a commercial focus but social economy ethos</li> <li>Other direct collaborative partnerships for example Opportunity youth and other youth specific partners locally and nationally.</li> </ul> </li> </ul>
North West Centre for Learning & Development	Derry	£50,000	<ul style="list-style-type: none"> <li>To establish a new Social Economy Business which would be mainly staffed by previous programme participants who completed training and achieved</li> </ul>	<ul style="list-style-type: none"> <li>The first indication that there was a need for this type of project originated within the needs NWCLD, operating as a social economy business, during a period in which the</li> </ul>	<ul style="list-style-type: none"> <li>The main outcome of the project will be the establishment of a new social economy business employing previously unemployed participants of Government and EU funded programmes who have</li> </ul>	<ul style="list-style-type: none"> <li>The proposed project is is an entrepreneurial venture which will support active citizenship and community development by providing employment to previously</li> </ul>	<ul style="list-style-type: none"> <li>Working with InvestNI / NW Marketing towards meeting the aims and objectives of the business plan, NWCLD hopes to have the business well established at the end</li> </ul>

Applicant	Town	Amount Requested	Overview of Project	Need for the Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Sustainability
			<p>qualifications but have been unable to secure employment?</p> <ul style="list-style-type: none"> <li>This will also address the problems faced in securing quality work-placements \ for trainees which also has the potential to lead to employment.</li> </ul>	<p>organisation required additional qualified staff to work within the finance department.</p> <ul style="list-style-type: none"> <li>Despite contacting several organisations and agencies, the organisation experienced extreme difficulty in recruiting suitable staff at affordable prices and established that there was a gap in the labour market for people with these skills and qualifications in Finance,</li> <li>IT Technical Support. Research has also demonstrated that an important factor in the failure of SME's and Social Economy businesses to survive is the prohibitive costs of sustaining good financial control procedures, technical support and administrative functions.</li> </ul>	<p>achieved high level training successes and who will deliver support services to other groups, organisations and individuals.</p>	<p>unemployed people who will in turn deliver a range of valuable services to the community, organisations and individuals.</p> <ul style="list-style-type: none"> <li>It is envisaged that taking people through the guided process of successfully coming off benefits into employment will act as encouragement to others who fear the financial impact of such a move. It is also hoped that it will eventually create revenue reserves which will help to sustain NWCLD</li> </ul>	<p>of funding so that it will be self-sustaining and providing a good quality service. It is also planned that much of the experience and expertise gained during the planning and set-up of the business will benefit others who wish to explore a similar venture.</p>
Reminiscence Network NI	Belfast	£49,572	<ul style="list-style-type: none"> <li>The Reminiscence Network Northern Ireland (RNNI) wants to deliver change that will enable the organization can achieve financial sustainability by 2014/2015.</li> <li>At present RNNI is heavily dependent on grant funding for its central overhead costs. This is not a sustainable situation and as such RNNI is therefore seeking additional support and resources for the delivery of integrated changes across the following 5 areas: Communication;</li> </ul>	<ul style="list-style-type: none"> <li>RNNI is still a relatively young and small organisation that over the last 4 years has been through a rapid period of change and growth. However, the organization now finds itself needing additional support and resources to be able to maintain the growth that has been achieved and to build a more sustainable approach to income generation A delivering change grant from the BCT would enable RNNI to increase the hours of its part time training and reminiscence staff to work on a revised and more realistic programme of</li> </ul>	<ul style="list-style-type: none"> <li>Increased recognition of the benefits of reminiscence work, of RNNI and its services, increased membership, communication with stakeholders and better records of member participation.</li> <li>Increased awareness of good practice regarding various areas and types of reminiscence work</li> <li>Reminiscence training and facilitation services taken up across Northern Ireland at rates capable of covering delivery costs and contributing to central overheads.</li> <li>Increased efficiency, clarity and cost savings regarding a number</li> </ul>	<ul style="list-style-type: none"> <li>RNNI's change project proposals could be seen as innovative in a number of ways:</li> <li>The change project is based on a holistic and integrated approach, i.e. the plan is not for one or two changes that are isolated from the rest of the organisations activities.</li> <li>The range of RNNI's change actions are prioritised not just from one document or one persons view point but built on a period of 12 months of forward thinking, reflection and discussion.</li> </ul>	<ul style="list-style-type: none"> <li>The measures outlined by RNNI focus on putting in place systems and procedures that will support ongoing sustainability of RNNI and its activities.</li> <li>It is envisaged that the intended impact of the changes is that by 2014/2015 they will have resulted in generating sufficient funds to cover central overhead costs including the continued existence of an Administration and Finance Officer and Development Manger posts.</li> </ul>

Applicant	Town	Amount Requested	Overview of Project	Need for the Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Sustainability
			<ul style="list-style-type: none"> <li>• Sharing good practice;</li> <li>• Income generation activities;</li> <li>• Financial and HR management; and</li> <li>• Effective governance.</li> </ul>	change as well as bringing in additional expertise and time through the use of external consultants.	<ul style="list-style-type: none"> <li>• of financial and human resource considerations.</li> <li>• Better informed decision making and governance by the Board of Management.</li> </ul>	<ul style="list-style-type: none"> <li>• The above participation should ensure maximum support and engagement in the implementation of change and avoid the kind of fear and resistance that some centrally driven change programmes can suffer from.</li> </ul>	
Stepping Stones NI	Lisburn	£34,459	<ul style="list-style-type: none"> <li>• Stepping Stones social enterprise and enterprises need to be marketed effectively in order generate income to be a success.</li> <li>• The idea for this project with BCT is to employ a Business Development Manager to successfully market the social enterprises to generate income to support the running costs of the organisation especially in the current climate when competition for funds is high.</li> </ul>	<ul style="list-style-type: none"> <li>• The project is needed to increase the opportunity to develop and maximise sales revenue in the organisation whilst at the same time develop the skills and employability of people with learning disabilities in its social enterprises.</li> <li>• Following an organisation structural review facilitated by an external consultant it was recommended that in order to maximise the overall potential of its social enterprises it would be necessary to appoint a business development manager to drive the businesses and services of its social enterprises whilst benefiting the group of people with learning disabilities that it was set up to benefit.</li> </ul>	<ul style="list-style-type: none"> <li>• Increase sales of social enterprises leading to future sustainability to the organization</li> <li>• Increased customer access to the services</li> <li>• Greater community participation through increase volunteering</li> <li>• Increased use of New Media to promote the social enterprises i.e. facebook and twitter</li> <li>• Develop the skills of people with learning disabilities leading to employment opportunities.</li> <li>• Advancement of public benefit by recognising that people with learning disabilities can make a valuable contribution to the economy and to the community.</li> <li>• Increase the confidence of people with learning disabilities and difficulties within their communities.</li> <li>• Prepare people with learning disabilities for employment in its delivery of local services.</li> </ul>	<ul style="list-style-type: none"> <li>• The project is innovative as it is recognising that social enterprise is an important in providing a realistic working environment for people with learning disabilities in a competitive funding environment and commercial environment.</li> </ul>	<ul style="list-style-type: none"> <li>• It is envisaged that through the appointment of a business development manager the levels of income generated will increase contributing towards sustaining the organisation in a climate of efficiency savings and cut backs in current services.</li> <li>• The development of the social enterprises will provide opportunities for young people with learning disabilities to access employment in a supportive commercial environment at a time when employment in the community is difficult due to increased competition for employment.</li> </ul>
The Villages Together	Strabane	£49,820	<ul style="list-style-type: none"> <li>• The proposed project aims to deliver on the findings of a community audit completed by The Villages</li> </ul>	<ul style="list-style-type: none"> <li>• Over the past few years The Villages Together scaled back from operational work until a complete strategic review was</li> </ul>	<ul style="list-style-type: none"> <li>• Delivering opportunities for organisational change for The Villages Together and its member groups.</li> </ul>	<ul style="list-style-type: none"> <li>• The project is innovative in that it aims to broaden participation and ownership of programmes of work by</li> </ul>	<ul style="list-style-type: none"> <li>• By using new technology, experiential learning and inspiring people to look at sustainability from the</li> </ul>

Applicant	Town	Amount Requested	Overview of Project	Need for the Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Sustainability
			<p>Together over the past year.</p> <ul style="list-style-type: none"> <li>The findings demonstrated a demand from community groups, local business and the wider community that The Villages Together seek new ways of working to deliver improved services.</li> </ul>	<p>conducted. Whilst conducting its research The Villages Together found that local people and groups were very much pushing the organisation to look at how it can be an active organisation which encourages new activity and increases opportunity to access services.</p> <ul style="list-style-type: none"> <li>The Research also found that a challenge was being laid down, for The Villages Together - to move forward, inspiring a more professional and business approach to service delivery.</li> </ul>	<ul style="list-style-type: none"> <li>Developing The Villages Together as a conduit for information on the social-economy and sustainable development.</li> <li>Establishment of a PR &amp; Marketing Strategy to service The Villages Together and local groups - using Social Media, Internet and Web-based technologies to sell third sector activity and the concept of The Villages Together. This will ensure a regular and positive strategy focusing on information exchange; and</li> <li>Delivering the concept of The Villages Together area as a hub and partnership delivery agent - attracting inward support from statutory agencies and other bodies who have a duty or interest.</li> </ul>	<p>harnessing interest in very specific elements and encouraging volunteers to take the lead and guide progress towards delivering more sustainable Community Development activity.</p>	<p>outset it is envisaged that this project will have provided an opportunity for groups and people to consider how best to deliver projects within the confines of finance and demand.</p> <ul style="list-style-type: none"> <li>This project aims to establish The Villages Together as a valuable resource for the local community, where support can be offered to groups so that sustainability becomes less of an issue. This project focuses on showing local groups the benefits of working together, supporting and learning from each other</li> </ul>
Voice of Young People in Care (VOYPIC)	Belfast	£59,964	<ul style="list-style-type: none"> <li>Include Youth, VOYPIC and Mulholland After Care Services each operate a series of administrative and organisational departments which are individually under-resourced, lack strategic expertise and collectively do not maximise on the potential for collaborative working.</li> <li>The proposed project aims to provide best practice support for the three organisations individually and collectively in the area of corporate services (finance, HR, development).</li> </ul>	<ul style="list-style-type: none"> <li>The partnership received funding from DHSSPS and DSD to carry out a feasibility study of the Corporate Service Department proposal which provided recommendations to its success, operational format and costs.</li> <li>The feasibility study stated that there was a clear need for enhanced collaborative corporate services and that the 3 agencies had complementary structures and processes in place which are key to the successful implementation of shared corporate services.</li> </ul>	<ul style="list-style-type: none"> <li>The project will ensure increased effectiveness, excellent governance and provide better value for money;</li> <li>The project will also provide a best practice example of how organisations can share their corporate services.</li> <li>It will also provide a model for others to consider, as they look for paths which will help them increase their efficiency, improve performance and offer value for money services.</li> </ul>	<ul style="list-style-type: none"> <li>VOYPIC have identified that the project is innovative in that it is attempting to develop a new model of shared Corporate Services which will enhance the performance and sustainability of the 3 organisations;</li> <li>This proposed initiative will also provide a model for other community and voluntary organisations wishing to increase their efficiency, enhance their organisations and deliver improved VFM services.</li> </ul>	<ul style="list-style-type: none"> <li>The benefits / outcomes of the project for the three partners will be sustained after the end of funding through reallocated internal resources from each of the three organisation, the increased performance of the 3 organisations as the Corporate Development Manager streamlines the financial process of each organisation and by offering the services of the Manager and team to other organisations for a fee.</li> </ul>

Applicant	Town	Amount Requested	Overview of Project	Need for the Proposed Project	Proposed Outcomes	Innovation and Potential for Learning	Sustainability
Volunteer Now	Belfast	£50,500	<ul style="list-style-type: none"> <li>On 1st April 2010, 9 volunteer centres and the Volunteer Development Agency merged together to create a new organisation - Volunteer Now.</li> <li>Volunteer Now now needs to develop, agree and implement a plan for the new organisation and infrastructure support for volunteering going forward over the next 5 years.</li> </ul>	<ul style="list-style-type: none"> <li>The proposed project will support implementation of organisational review/development associated with the merger that created Volunteer Now.</li> </ul> <p>Evidence of need to have an integrated infrastructure is supported by the following:</p> <ul style="list-style-type: none"> <li>2007 Research into volunteering in NI identified that volunteer numbers are at best static and there is a key issue of supply and demand with organisations finding it harder to recruit volunteers.</li> <li>This is also evidenced by NICVA 2009 State of the Sector report. Research indicates that some 25% of non-volunteers would volunteer if asked.</li> <li>Evaluation of DSD funding of the Volunteer Bureau Initiative (2008) questioning the then local structure (Volunteer Centres) and delivery of DSD objectives in relation to 'being fit for purpose and providing 'value for money', clearly indicating the need to rethink the structure, leadership and management of the local volunteering infrastructure.</li> </ul>	<ul style="list-style-type: none"> <li>The project will implement the re-structure of Volunteer Now to create an effective &amp; sustainable organisation.</li> <li>Increase public access to volunteering information and opportunities.</li> <li>Improve access to advertise volunteering opportunities</li> <li>Increase volunteer recruitment.</li> <li>Demonstrate the positive benefits of a merger to deliver enhanced services and more effective use of resources.</li> </ul>	<ul style="list-style-type: none"> <li>A Merger associated with 10 organisations is innovative within the voluntary &amp; community sector. The experience of the post-merger change process and outcomes will provide useful learning that can be shared with the wider voluntary &amp; community sector.</li> <li>The project is also concerned with looking at how volunteering is promoted and increased at a local level using more creative IT including social networking, new to the volunteering infrastructure. This will directly benefit the voluntary &amp; community sector as it makes a positive contribution to increasing the supply of volunteers. There is also learning associated with the use of IT as a promotional and recruitment vehicle.</li> </ul>	<ul style="list-style-type: none"> <li>Volunteer Now is seeking to deliver internal organisational change and external transformation of how the volunteering infrastructure can promote, support and develop volunteering.</li> <li>This project will enable the organisation to complete the initial strategic implementation of internal organisational review in relation to staff &amp; management structures; it will also enable development of a key strand of the expected benefits of the merger to maximise resources and enhance creativity to promote volunteering more effectively.</li> </ul>
		<b>£798,532</b>					

---

## Appendix V – C&V Sector Organisations

C&V sector represented at consultation events

1. Advice Northern Ireland
2. Ards Development Bureau
3. Ashton Community Trust
4. Ballymagroarty/Hazelbank Community Partnership
5. Ballymoney Community Resource Centre
6. Belfast Health Trust
7. Belfast Regeneration Office (BRO)
8. Bellanaleck Community Group
9. Boho Community Association
10. Briege Lewis Belfast Regeneration Office
11. Broughderg Area Development
12. Carrick Hill Residents Association
13. Carrowshee Park & Sylvan Hill Community Association
14. Catherwoodstown Seniors
15. Coleraine Rural and Urban Network
16. Comhairle na Gaelscolaíochta
17. Communities of South Tyrone Area
18. Community Arts Forum
19. Community Change
20. Community Development Agency
21. Community Development Health Network
22. Community Focus Learning
23. Community Foundation for Northern Ireland (CFNI)
24. CFNI CDLR Course
25. Community Organisation of South Tyrone and Area (COSTA)
26. Community Places
27. Cookstown & District Women's Group
28. Cookstown & Western Shores Area Network (CWSAN)
29. Craft Group Lakeland Forum
30. Craigavon Community Network
31. Craigavon Travellers' Support Committee
32. Derry Healthy Cities
33. Disability Action
34. Down District Volunteer Centre
35. East Belfast Community Development Agency (EBCDA)
36. East Belfast Partnership
37. East Down Rural Community Network
38. Eastern Childcare Partnership
39. Face Inclusion Matters
40. Fermanagh Churches Forum
41. Fermanagh Rural Community Network
42. Fermanagh Trust
43. Focus on Family
44. Forthspring Intercommunity Group
45. Foyle Women's Aid
46. Friends of The Brook
47. Harpur's Hill Children and Family Centre
48. Home Start NI
49. Home-Start Causeway
50. Inverary Community Centre
51. Island Arts Centre (Lisburn)

52. Kildress Kare
53. Killesher Community Development Association
54. Kinawley Enterprise Ltd
55. Lisanelly Regeneration Group
56. Lisbellaw Wednesday Club
57. Loughshore Youth Forum
58. Macosquin Village Association
59. Methodist Women in Ireland
60. Moneymore Activity Group
61. Mullaghduin Community Association
62. New Belfast Community Arts
63. New Lodge Arts
64. Newry Confederation of Community Groups
65. NI Rural Womens Network (NIRWN)
66. North Antrim Community Network
67. North Belfast Partnership
68. North West Community Network
69. North West Taxi Proprietors Ltd
70. Northern Visions
71. Oakleaf Rural Network
72. Omagh Forum for Rural Associations
73. Omagh FOCUS
74. Opportunity Youth
75. Phoenix ADHD project
76. Public Achievement
77. REAL Project
78. Rosemount Resource Centre
79. Rural Community Network
80. Rural & Urban Networks
81. Sandholes Community Group
82. Short Strand Community Forum
83. Short Strand Partnership
84. Smile Surestart
85. South Armagh Rural Women's Network
86. St Patricks Church
87. Star Neighbourhood Centre
88. Stewartstown Community Group
89. Strabane and District Rural Community Network;
90. Sydenham Partnership
91. The Bytes Project
92. The Resource Centre Derry
93. Towards Understanding and Healing
94. Training for Women Network
95. Voluntary Arts Ireland
96. Wandsworth Community Association
97. Women of the World
98. Women's Aid
99. Women's Forum NI
100. Women's Information Group
101. Women's Resource and Development Agency
102. Women's Support Network
103. Yes Publications
104. Youth Forum

## Appendix V – Overview of C&V Sector Consultation Events

**Table V.1**

Trust's Engagement with the C&V Sector

Area/Theme	Date	Focus of Event/Seminar	Summary of Topics discussed during consultation event	No. of Attendees	No. of Org.
<b>2009 Events</b>					
TBC	3rd July	<i>"What needs to be done to build a better community and voluntary sector?"</i> Participants agreed key themes including sustainable resourcing, effective partnership work, engaging and valuing volunteers	<ul style="list-style-type: none"> <li>• Community development learning models e.g. educate statutory agencies about working on the ground;</li> <li>• Equitable and effective partnership work;</li> <li>• Engage, value and support volunteers;</li> <li>• To sell success via celebrating success and publicising achievements to inspire other groups;</li> <li>• Needs based strategic delivery framework;</li> <li>• Strategic Framework e.g. to identify a collective voice for the sector and to develop a framework/strategy for community development;</li> <li>• Sustainable resourcing e.g. sustaining advocacy at all levels and to provide core funding for networks; and</li> <li>• Cross sectoral leadership and accountability.</li> </ul>	21	20
North West	24th Sept	<i>"What must my organisation do to ensure our community needs are better met now and into the future?"</i>	<ul style="list-style-type: none"> <li>• Action – to promote engagement within the voluntary and community sector e.g. through developing good practice on community engagement.</li> <li>• Quality Partnerships;</li> <li>• Securing income streams;</li> <li>• Innovative and solutions focused;</li> <li>• Respond to change; and</li> <li>• Promote community development</li> </ul>	17	11
Belfast	29th Sept		<ul style="list-style-type: none"> <li>• Enhanced engagement;</li> <li>• Planning and policy development;</li> <li>• Communication and advocacy;</li> <li>• Appropriate collaboration;</li> <li>• Funding and sustainability;</li> <li>• Innovation;</li> <li>• More focus on evidence; and</li> <li>• Capacity building and skills development.</li> </ul>	9	8

Area/Theme	Date	Focus of Event/Seminar	Summary of Topics discussed during consultation event	No. of Attendees	No. of Org.
Fermanagh	30th Sept		<ul style="list-style-type: none"> <li>• Working together e.g. working in partnership with local community groups and the sharing of ideas;</li> <li>• A voice for Fermanagh – This will be achieved via consultation and communication and to ensure individuals advocate and lobby for Fermanagh;</li> <li>• Consult the community via evaluation of current activities, community audit and questionnaires to establish community needs;</li> <li>• Support for volunteers e.g. through training and attracting/retaining new members</li> <li>• Broadband for Fermanagh; and</li> <li>• Local resources for local activity.</li> </ul>	18	14
Mid Ulster	1 <sup>st</sup> Oct		<ul style="list-style-type: none"> <li>• Developing community business;</li> <li>• Securing funding;</li> <li>• Networking and partnership working;</li> <li>• Keep on working – This involves working on projects, local councils and raising awareness of need;</li> <li>• Equity across providers; and</li> <li>• Effective and efficient provision via a more effective use of existing resources and to ensure non supplantation of services.</li> </ul>	16	12
Regional Womens Sector	6 <sup>th</sup> Oct		<ul style="list-style-type: none"> <li>• Income generation e.g. heighten awareness of social economy projects and to encourage the build up of reserve funds;</li> <li>• To develop effective communications through creating communication channels between local groups and government ;</li> <li>• Lobbying and advocacy;</li> <li>• Identify need;</li> <li>• Invest in people through empowerment, training and support;</li> <li>• Effective partnership working and build relationships;</li> <li>• Funding;</li> <li>• Protect community development via sustainable projects and resources; and</li> <li>• Accountability.</li> </ul>	16	13
North Antrim	7th Oct			TBC	TBC
Coleraine & District	14th Oct		<ul style="list-style-type: none"> <li>• The art of networking and communication;</li> <li>• Developing partnerships;</li> <li>• Across the board training;</li> <li>• Service delivery to meet identified needs;</li> <li>• Provision of community resources and activities;</li> <li>• Integration of communities development;</li> <li>• Volunteer recruitment and development; and</li> </ul>	10	9

Area/Theme	Date	Focus of Event/Seminar	Summary of Topics discussed during consultation event	No. of Attendees	No. of Org.
North Belfast	23 <sup>rd</sup> Oct		<ul style="list-style-type: none"> <li>• Intelligent funding.</li> <li>• Money for IT modernisation across the sector;</li> <li>• Building capacity in organisations funding;</li> <li>• Policy and practice;</li> <li>• Are we making a difference? – Assistance to meet compliance requirements, impact of outcomes to date and better evaluation models;</li> <li>• Developing sustainable options e.g. exploring social enterprise approach to sustainability;</li> <li>• Building a shared future within the sector and wider society;</li> <li>• Building capacity within communities;</li> <li>• Volunteering; and</li> <li>• Develop organisational skills through effective training and developing future leaders.</li> </ul>	25	21
Omagh	28th Oct			TBC	TBC
East Belfast	4 <sup>th</sup> Nov		<ul style="list-style-type: none"> <li>• Identify need through targeted work/funding and to develop an outcome focused engagement;</li> <li>• Sustainability and good management;</li> <li>• Communication and accessibility;</li> <li>• Partnerships/exchange of information and knowledge;</li> <li>• Community led approach (bottom up);and</li> <li>• Support diversity.</li> </ul>	18	12
<b>2010 Events</b>					
Mergers and Collaboration	27 <sup>th</sup> Jan	Mergers & Collaboration' Seminar - Trust, NICVA and 'Chief Officers Third Sector ('CO3') brought together 27 representatives of the sector to discuss mergers and collaboration and their future potential in the sector.	<ul style="list-style-type: none"> <li>• The Building Change Trust is currently considering how it will use its resources to respond to the issue of mergers, collaboration and partnership over the coming period;</li> <li>• Key themes/areas for discussion included:               <ul style="list-style-type: none"> <li>- VCS collaborations and Private sector collaborations are about creating improved stakeholder value;</li> <li>- Identify key drivers e.g. Voluntary collaborative activity and Involuntary collaborative activity.</li> </ul> </li> </ul>	27	27
Social Investment	19 <sup>th</sup> Feb	Seminar to consider development potential for social investment in the NI community and voluntary sector using the Building Change Trust	<p>Topics for discussion included:</p> <ul style="list-style-type: none"> <li>• What is Social Finance?</li> <li>• Why does the sector need access to a variety of financial instruments/products?</li> <li>• What types of financial products are suitable for the sector?</li> </ul>	TBC	TBC
Funding for attendance bursaries	4 <sup>th</sup> and 5 <sup>th</sup> Feb	Chief Officers Third Sector (CO3) Leadership Voyage Conference. The Trust provided £1,500 funding towards attendance bursaries for staff and/or board members of	The conference aimed to give leaders in NI's third sector space to consider future trends and developments, skills to manage the forthcoming change and inspiration and passion to lead their organisation through change.	TBC	TBC

Area/Theme	Date	Focus of Event/Seminar	Summary of Topics discussed during consultation event	No. of Attendees	No. of Org.
		community and voluntary sector organisations. The conference aimed to give leaders in NI's third sector space to consider future trends and developments, skills to manage the forthcoming change and inspiration and passion to lead their organisation through change.			
	17 <sup>th</sup> Feb	'Measuring Up' - A Review of Evaluation Practice in the Voluntary and Community Sector was launched by the Community Evaluation Northern Ireland. The research, which was funded by the Department of Social Development and by the Trust, set out to review the current state of evaluation practice and to inform debate on how this needs to be developed in the face of a very challenging political and economic environment.		TBC	TBC
	19 <sup>th</sup> Feb	Seminar to consider development potential for social investment in the NI community and voluntary sector using the Trust		TBC	TBC
Progress of BCT to date and plans for future	26 <sup>th</sup> March	'Working Towards a Way Forward' Conference - presentation by Trust Chairperson to over 100 delegates regarding the progress to date and plans for the future.	Areas for discussion included: <ul style="list-style-type: none"> <li>• Aims and Objectives of the Trust were discussion;</li> <li>• Exploring and Delivering Change Programme;</li> <li>• Partnership, Collaboration and Mergers and;</li> <li>• Permanent loan fund for the sector.</li> </ul>	TBC	TBC
Belfast	7 <sup>th</sup> May	Award Programme (Exploring Change and Deliver Change) launch event	<ul style="list-style-type: none"> <li>• Both the Exploring Change and Delivering Change programmes are open to charitable community and voluntary organisations working within NI.</li> <li>• The <b>Exploring Change</b> programme will make 60 awards of up to £20,000 (i.e. £1.2m) for exploratory work within the sector.</li> <li>• The <b>Delivering Change</b> programme will make 20 awards of around £50,000 (i.e. £1m) for work to implement change</li> </ul>	TBC	TBC
	26 <sup>th</sup> July	Deliver Change Phase 2 Information Session. Phase 2 of the Deliver Change awards programme will make 5 awards of around £50,000 per award. The awards will enable organisations start to implement change for future sustainability in the context of making a contribution to one or more of the Trust proposed outcomes.		TBC	TBC

