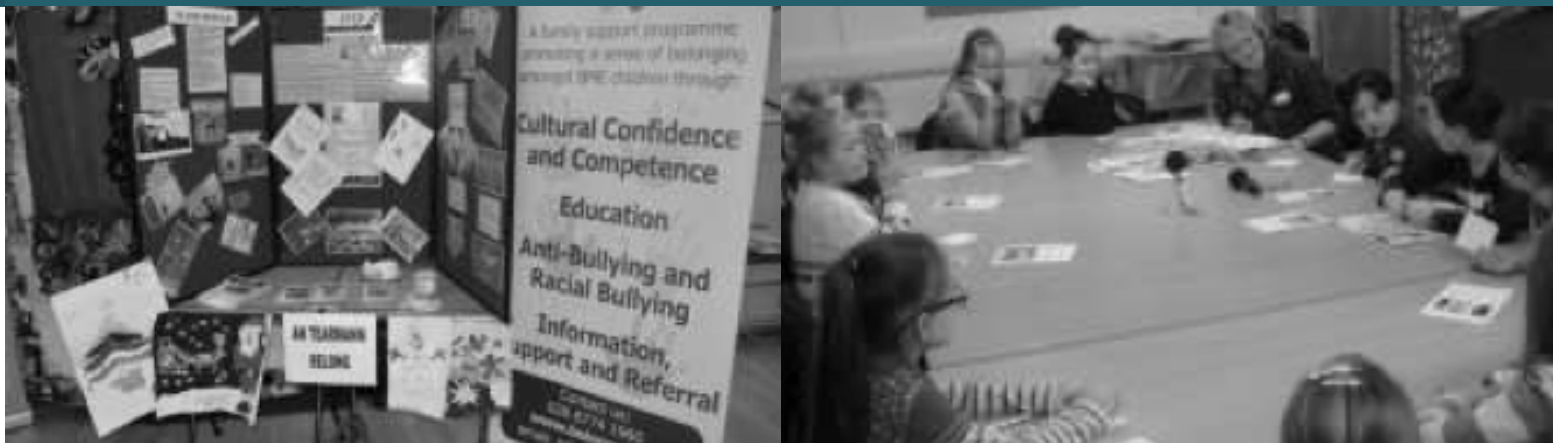


Sustainability Learning Review 2015

The STEP Programme



The
ATLANTIC
Philanthropies

Introduction

STEP was created in 1996 as a 'self-help' project/organisation between eight local communities in the rural council area of Dungannon & South Tyrone in Northern Ireland. The project received an initial £52,000 from European Peace funds (EUSSPR) "to contribute to building a peaceful and prosperous community, which protects rights, respects difference and embraces diversity."

The organisation also sought to work directly with excluded individuals and communities by providing information, guidance, skills development, knowledge and access to expertise that would hopefully enable these individuals participate equitably in the following areas:

- Decision-making processes which affected their daily lives
- The socio-economic and cultural activities of the wider community
- The shared responsibility to protect the rights of others that are different

STEP has also looked to work with other agencies to support access to opportunities and services through policy change, as well as the effective implementation of existing policies that promote the inclusion of marginalised individuals and ethnic groups. The organisational value base of the organisation is human rights and shared responsibility, so advocacy and lobbying have emerged as important activities in the STEP programme.

This holistic approach has always looked to position the 'outsider' at the centre of the equation as STEP remains committed to tackling the problems linked to social inclusion. For example, as a result of economic opportunities stemming from the peace process in 2001, local agri-food companies based in the Dungannon and South Tyrone area underwent an expansion.

To meet the growing labour shortage, many companies recruited skilled and unskilled migrants as agency workers.

The expansion of the European Union in 2004 created similar opportunities for local engineering firms in the area. Ultimately the STEP approach was put to the test against an emerging backdrop of new exclusions and prejudices around racism.

The role of The Atlantic Philanthropies

Initially Atlantic provided a funding grant to STEP, in order to assist the organisation review its development and growth to date as well as assist in planning for future development. STEP has since evolved into a charitable organisation owned by the community, and is also the single shareholder in its very own social enterprise.

At present it employs a total of 30 highly skilled community organisers, development, advice and advocacy staff, and also provides employment opportunities for others as trainers, facilitators, support workers and interpreters/translators. Atlantic has played a significant role in the journey to date, and since 2007 has invested significantly in activities linked to the development, growth and sustainability of the organisation.

Long-term outcomes (over a five-year period) from Atlantic investment have included:

- STEP emerging as both a model of innovative practice as well as an effective policy advocate for migrant communities
- Designing innovative practice models that can be replicated across NI and beyond
- Promoting the role, voice and visibility of migrant communities in all areas of public life in NI
- Empowering migrant communities to lobby and influence public policy changes
- Improving how public bodies deliver services to migrant communities
- Reducing prejudice against migrant communities and increasing integration

Key impacts and successes

With the support of Atlantic STEP made significant progress which has resulted in the following outcomes:

A good practice model: The organisation is regarded as a model of good practice model not only for its impact in terms advocacy and innovation but also the support it has provided for migrant communities across the local area.

A migrant network: STEP has developed and currently facilitates a network of like-minded organisations across Northern Ireland. This has since led to an increase in participation, ownership and leadership of these organisations by members of new immigrant and minority ethnic populations.

Collaboration with other agencies: An additional impact through STEP's main programme of work was the ability to influence the wider interagency Children's Services Planning Partnership. Here STEP has represented the local community organisations and looked to address the specific needs of minority ethnic children. It has also looked to promote a specific opportunity within Atlantic's Children's programme, that will aim for that partnership to take forward the BELONG programme.

Due to its community-based approach that focuses on promoting integration, STEP has also been able to effectively increase the capacity of the BELONG programme. This has helped to reduce prejudice, increase integration and build a common cause on shared socio-economic problems.

Sustainable impact of Atlantic investment

The three main factors can be summarised as follows:

Duration of the investment: effectively nine years of sustained engagement with Atlantic

Total amount invested: £2.56m

Underlying philosophy of the investment: The relationship between Atlantic and STEP has always been portrayed as a partnership investment. Atlantic explicitly made a financial investment in creating social change through the work and activities of STEP. The investor actively engaged in protecting and supporting that investment by working collaboratively with the organisation as an equal partner.

This approach was fundamentally different relationship compared to either a private or public sector funding model. The broader impact of the Atlantic approach, particularly in terms of organisational learning should not be overlooked. Despite recognising the importance of sustained and significant funding resources, it was this approach that was valued the most.

Sustaining STEP – challenges and implications

STEP's definition of sustainability looks to extend beyond maintaining funding for its core activities. Although financial viability is an important issue STEP also feel it is important define sustainability in terms of its long term vision and objectives. Sustainable practice is as much about why and how the organisation performs as about if and how the work can be financed. This does not mean to suggest that STEP does not require financial assistance, but it should not be the only determining factor when evaluating sustainability. Sometimes activities have to be completed without it. In this regard STEP has developed several features that characterise the potential sustainability or enduring capacity of the organisation. These are presented together in the following section, along with the impact of Atlantic which has enabled STEP to strengthen these features within and beyond the period of financial support. Holistically, they also represent the enduring internal environment of STEP.

Internal Environment

1) STEP – an organisational structure

STEP is a complex organisation that possesses the capacity for structural flexibility to maintain internal organisational stability in a wider context of external instability. This organisational structure has continually evolved to meet the systemic need of the process required to deliver effectively on the vision of STEP. It is therefore not an activity-/project-focused organisation, although it does engage in project activity as core elements of its work.

Key sustainability issue: Creating a governance structure that facilitates both centralising experiential knowledge and organic democratic ownership by the community of

interest, ie excluded ethnic minorities, whilst simultaneously ensuring the increasing complexity of legal responsibilities are adequately supported with specialist expertise to support informed decision making over the next five years.

Atlantic impact: Atlantic's outcome-based approach has facilitated this reality better than micro-management of outputs and minutiae of day-to-day financial expenditure. The board of STEP was able to explore potential structures and discuss these issues openly. Atlantic did not look on exploration of change as a cause for alarm.

2) STEP as innovative organisation that has embraced community enterprise and community asset development (both social and financial).

STEP represents hybrid of community enterprise, community organising and community service provision, with its focus always being local. This has maintained a certain level of financial and therefore organisational independence. It has also allowed STEP to develop a significant amount of social capital and thus enabled a greater capacity to 'get things done'.

This has supported the development of tangible community assets and resources and allowed for sustainable reinvestment in various form of ongoing work. However, this process has also posed challenges in continuing demand to increase developing the capacity of the organisation linked with appropriate expertise.

Key sustainability issue: Creating a legal structure for the organisation and its associate member groups. This will potentially enable the organisation to maximise its financing potential and sustainability within the aims and ethics of the organisation. It should also encourage collaborative and partnership working without diluting the core values of the organisation.

Atlantic impact: Atlantic have provided a sustained period of financial stability which has enabled the organisation's senior management to concentrate on the strategic development of income streams as well as asset development for the post-investment period. It has also allowed senior management to focus on developing the organisation's skills and expertise to achieving this objective.

3) STEP as a quality-controlled/ best-practice organisation

STEP has looked to build its reputation on its commitment to deliver high quality outcomes.

Key sustainability issue: Sustaining organisational Knowledge. The need to create an internal process that enables effective skills development, learning and knowledge sharing as every day practice of the STEP model. This will hopefully encourage the retention of staff (which at present is three to five years) before they can progress to higher regional positions, directly as result of any professional development/experience that was gained in the STEP programme.

Atlantic impact: Atlantic's contribution has enabled STEP to improve its systems, quality framework as well as increase both staff skills and professional qualifications. It has also provided opportunities for peer learning across various Atlantic grantees.

4) STEP as an independent and confident organisation

STEP is owned by the community it serves and looks to enable those with whom it works to have their independent voices heard – even when those voices/opinions do not align with organisational perspectives.

Sustainability issue: This report has already identified the value of collectively sustaining STEP's organisational independence and confidence. This reflects a sustainability of values issue. STEP need to sustain delivery on its vision without the 'given' financial stability and security enjoyed during the Atlantic period.

Atlantic impact: Atlantic has provided financial independence from the public purse which makes bravery an easier concept to practice. The commonality of purpose shared between funder and funded together framed by an equitable relationship (the Atlantic and STEP partnership) has ensured that STEP has been able to maintain a level of autonomy within that funding relationship.

5) STEP as a social change organisation

This is the raison d'être of STEP as an organisation. If the organisation was not actively contributing to changing the balance of power/equity/participation in decision-making towards those who are most vulnerable to social and economic exclusion, it would have no reason to exist.

Sustainability issue: Creating an internal environment that recognises and acts upon the core purpose as an integral part of every aspect of the organisation and its work.

Atlantic impact: Atlantic has enabled STEP to deliver and develop its work as well as simultaneously enhance its organisational confidence and practice. None of the above is without challenge, and to ensure effective social change STEP must continue to invest in an ongoing process of theoretical and experiential learning, critical thinking, and actively encouragement for new ideas and innovation in practice.

Challenges created by external environment

Economic

- Continuing austerity and the reduction of economic rights for migrants
- The economic impact created by a potential UK withdrawal from the EU
- An overall reduction in grant-aid to voluntary and community organisations
- A potential slowdown in economic recovery, thus reducing employment opportunities

Social

- An increasing challenge to meet social need and sustain social solidarity
- An increase in widespread poverty and potential for more social fragmentation
- A greater complexity of need focused on same populations
- Lower level of participation in collective community actions

Political

- Increasing political hostility towards migrants at the national level across the UK
- More political instability in both UK and Ireland (UK austerity/impasse in NI Peace/elections/centenary commemorations; Scotland and EU referendum.)
- Ongoing challenges to social values of human rights, social justice and solidarity across all political levels – the regional, national and international

Transformational Opportunity

From a STEP perspective, present circumstances also represent an opportunity to be creative. The external environment demands innovation and creativity without compromising values. Atlantic have enabled pilot STEP and evidence collected since has demonstrated that the STEP approach works and is successful.

The exit strategy

To ensure sustainability and develop future capacity, STEP has looked to restructure some of its key organisational relationships.

Networks

The Stronger Together network is now financially independent of STEP and generates a small income for the organisation by maintaining and facilitating its governance, eg financial governance and managing employment of a part-time network facilitator.

STEP has also supported neighbourhood beneficiaries to form groups and structures that are independent of STEP. It also mentors the developing leadership and supports these through Stronger Together and signposting to other appropriate networks, eg NICEM.

These groups undertake the local activities that were previously organised by STEP. In this approach the activity and the resources to sustain are re-localised while the STEP's remit in sustaining them is to support delivery in a collaborative and resource-saving mutuality, through the active sharing network. STEP supports the groups in securing the financial resources for the work at local government level through small trust funding.

Partnerships

The Review of Public Administration, financial austerity policy and a diminishing funding environment requires service delivery to be provided in a more integrated way. This will hopefully avoid expensive duplication and minimise a race to the bottom in terms of quality, which inevitably occurs from a competitive market model that prioritises lowest price.

We have now developed a partnership with Magherafelt Independent Advice Service to bring together expertise in advice, especially around welfare benefits, together with our own services in translation, legal advocacy and understanding of immigration rules in the UK.

The new partnership will pool its staff and expertise in the delivery of advice across the Mid-Ulster area. The two organisations have been working together over the past 16 months towards this goal and will formally launch the new service in September 2015.

Consortiums

STEP has developed consortiums based on geographical location eg Dungannon which includes participation from various communities of interest, eg ethnicity, disability, gender and learning capabilities. STEP has looked to bring these communities together in the development of a united shared space. This is linked to the physical asset development strategy which will be outlined in more detail in the following section.

Financial sustainability – income generation

Grant-Aid

STEP has identified the funding potential of two current National Lottery initiatives:

- Supporting Families
- Empowering Young People

Currently the project is in the second stages of an application with Supporting Families to undertake a programme that will work directly with some of the most excluded and marginalised minority ethnic families across Northern Ireland. These families have complex needs and are currently excluded from a range of opportunities and entitlements.

STEP is also supporting and mentoring independent partnerships that will make collaborative bids to the Empowering Young People initiative. This will look to build on their participation as beneficiaries of Atlantic-funded STEP and BELONG programmes.

Finally, STEP will also look to secure grant aid from local government as well as the new Dept. of Communities and Philanthropic Trusts. This will look to support activities linked to the completion of evidence based research.

Public procurement tender

By concentrating on quality, added value and effective collaboration rather than just 'how STEP is funded' has allowed the organisation to compete in the wider market place for publically tendered service contracts.

STEP currently foresees the service delivery work for 2016-2019 to go to tender in September 2015. In preparation for this, the organisation has worked hard to meet new accredited standards and has provided skills training for the staff in areas such as business management and tender procurement.

Investing in asset based sustainability

Over the past 20 years, STEP has sought to maximise resources by uniting together its community activities and partnerships under one roof. The organisation was fortunate to invest in a building when the property market was at its lowest, and therefore acquire a physical asset without debt and a potential increase in value.

A final investment of £500,000 from Atlantic has allowed STEP to complete its asset acquisition strategy. This has enabled it to take a calculated risk on accepting a £3.2m grant in January 2015 and complete the construction of the centre before the end of September 2015.

Community enterprise – STL

STL is the community enterprise company, in which STEP (the charitable parent company) is the single shareholder. STL has provided the business expertise to STEP during the asset development phase of the property, whilst simultaneously maintaining income generation through training and development as well as the delivery of interpreting and translation services.

Exploring the potential and possibility of more community enterprises will be a priority for STEP during 2016. However, this will only happen when sustainable income generation from the asset development is in place.

Philanthropy

At the outset, Atlantic provided expertise to prepare for the withdrawal of its funding. This included identifying and engaging with local individuals that may have resources to help replace Atlantic. STEP began but did not choose to pursue this approach for several reasons.

The organisation has always felt that this wasn't about money, and the responsibility to Chuck Feeney and Atlantic was to ensure the legacy of philanthropy as well as the protection of human rights and the promotion of reconciliation.

STEP decided this was best done by developing its own philanthropic potential at local level, and embedding social change as sustainable practice.