

Evaluation of the Dormant Assets NI Phase One Grant Programme

Evaluation case studies

Learning from grant recipient organisations



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Introduction

This document contains seven case studies developed as part of the evaluation of the Dormant Assets NI Phase One Grant Programme.

The aim of Dormant Assets NI is to support the voluntary, community and social enterprise (VCSE) sector in Northern Ireland (NI) to be more resilient and prepared for the future, by funding activity that increases capacity and sustainability. Dormant Assets NI is delivered by The National Lottery Community Fund. Dormant Assets NI funded a Phase One Grant Programme (hereafter referred to as the 'Grant Programme'), in which 244 organisations received grant funding totalling £19.9m. The Grant Programme ran from January 2021 until March 2023, and grant-funded projects will run until 2027.

In November 2023, SQW (an independent research consultancy) was commissioned by The National Lottery Community Fund to undertake an evaluation of the Grant Programme. The evaluation team developed case studies with eight grant holder organisations (including one joint case study focused on two co-located organisations). The case studies focused on outcomes, impacts and learning emerging from the organisations' grant funded activities. Each case study involved between one and five interviews with organisational staff, and a review of key documentation.

The first three case studies were developed during Wave 2 of the evaluation (in autumn 2024), while the latter four case studies were developed during Wave 3 of the evaluation (in spring 2025).

The case studies should ideally be read alongside the final evaluation report, which provides detailed insights into the learning, outcomes and impacts emerging from the Grant Programme. The report is available – [Evaluation of the Dormant Assets NI Phase One Grant Programme](#). A guide for VCSE organisations is also available - [From Surviving to Thriving: Insights on Building VCSE organisational Capacity & Sustainability](#).

Our thanks go to the case study organisations and those that took part in interviews or provided documentation to inform the case studies.

Bolster Community

Case study summary

- Bolster Community is a charity and social enterprise based in Newry and Kilkeel, which offers a range of support to the local community around three key workstreams – Ability (supporting children and young people of mixed ability), Family (supporting parents and families) and Seniors (supporting older people in the community).
- Bolster Community secured £100,000 funding from the Dormant Assets NI Programme to diversify their income streams and strengthen their expertise in business development and marketing, via the recruitment of a Business Development Manager.
- The funding was awarded for the March 2022 – March 2025 period. In response to difficulties in recruiting a Business Development Manager, Bolster Community adopted a hybrid approach, bringing in sales and enterprise expertise via a retail consultant, and strengthening their marketing offer via the recruitment of a part-time in-house Communications and Marketing Manager.
- The funding also played a central role in supporting the delivery of the Bolster Buddies programme, which launched in May 2022. This is a Self-Directed Support (SDS)-funded service that provides Short Break Opportunities - young people with additional needs are supported to make candles for Bolster Community's ACORN social enterprise, while receiving support to promote their independence and improve their life skills. This hybrid approach – referred to by the organisation as “Candles & Care” – enabled the organisation to generate income while also providing support.
- As a result of the Dormant Assets NI funding and related programmes of activity, Bolster Community reported that their generated income (through Short Break Opportunities, ACORN and training programmes for parents and children) now accounts for 68% of their overall income, while previously this had been c30%. They also report significant growth in their social media reach. Bolster Community staff members highlighted the opportunity to focus on sustainability and longer-term growth as a key outcome brought about as a result of the grant funding.

Introduction

Bolster Community (previously known as Space NI) is a charity and social enterprise based in Newry and Kilkeel, which has been operating for 20 years. It provides support across three key workstreams – **Ability** (focused on supporting children and young people of mixed ability, including neuro-diverse young adults and young adults with learning disabilities), **Family** (focused on providing practical



BOLSTER
COMMUNITY

and therapeutic support to parents and children) and **Seniors** (focused on providing dedicated support to older people to tackle social isolation). They provide a range of support services across these three workstreams, in addition to running a social enterprise, ACORN. ACORN aims to generate profit for the charity via the sale of candles, diffusers and soaps, which are made by young adults with learning disabilities as part of a day opportunity, or 'Short Break Opportunity' service (Bolster Buddies) offered under the Ability workstream.

The organisation is funded through local Health and Social Care Trusts and other organisations buying their services, alongside grant funding, and generated income through programme and retail sales.

This case study is based on interviews with four members of staff at Bolster Community, conducted during an in-person visit to their Newry premises in November 2024, and a review of relevant documentation including Bolster Community's 2024/25 Annual Impact Report, their Strategic Plan 2025-2030, their Dormant Assets NI funding application and two progress reports, and evaluation survey response.

Delivery

Bolster Community's key aim for the Dormant Assets NI funding was to **diversify their income streams**, strengthen their expertise in **business development and marketing**, and **ensure the longer-term sustainability of their organisation**.



It's hard to think big when living small.

Bolster Community Dormant Assets NI funding application

"We often use the phrase 'it's hard to think big when living small' [...] We are at a stage in the growth of the organisation where we need dedicated staff with a focus on income growth to ensure our longer term sustainability and ability to meet the growing needs of our community."

Bolster Community Dormant Assets NI funding application

Bolster Community applied for £100,000 of funding from Dormant Assets NI, to cover a period of three years, with the **key goal of recruiting a Business Development Manager (BDM)**. In addition to the BDM post, the funding was to be used to **buy in professional marketing and retail support** "to ensure sales and opportunities are maximised, to build a sustainable offer," and to **support attendance at trade fares/conferences and business-to-business retail shows**. Bolster Community had recently commissioned an independent review which found that the organisation would benefit from a hybrid approach to income generation of both sales and grant funding, which informed their application.

Bolster Community staff members spoke of the challenge of balancing service provision with business development and income growth:

“It’s the dilemma of our sector - and the VCSE sector more generally. We expect a lot of our staff, but taking the social enterprise to the level we took it required a whole new set of skills and resources we didn’t have.”

Bolster Community staff member

The BDM role was anticipated to help strengthen the capacity of the organisation, develop new social enterprise products and services, and explore new markets and funding opportunities; it was expected that social enterprise profits could also be reinvested into the organisation and fund staff training and development alongside other support programmes.

The organisation was awarded the full amount of Dormant Assets NI funding applied for, in March 2022. However, Bolster Community faced unexpected challenges in recruiting into the BDM role, which staff members noted as a wider issue in the VCS sector in NI over recent years, with a lack of potential recruits with business development expertise. They eventually changed their approach by **bringing in sales development expertise via a retail consultant**, and hiring a **part-time Communications and Marketing Manager**.

Staff spoke positively about this hybrid approach – working with the retail consultant allowed for external expertise to be flexibly fed in the organisation, while the Communications and Marketing Manager brought insight and knowledge to enhance day-to-day operations. The staff member recruited into this post noted the importance of external outreach:

“I can’t imagine [the existing workforce of] Bolster [Community] juggling this – being able to do their jobs and offer services, and the role of comms and marketing, and outreach for both the charity and the enterprise. But it’s such a big part of it – communicating with people and with businesses.”

Bolster Community Communications and Marketing Manager

A key part of Bolster Community’s story over this period has been the **Bolster Buddies service**, which came about as a result of collaboration with Southern Health and Social Care Trust, and involved working closely with the retail consultant. As part of the ACORN social enterprise, Bolster Community had previously brought in young adults from the community to volunteer as part of a Short Breaks Opportunity. Via this work, Bolster Community noticed that a number of this cohort required more consistent or longer-term support and were also entitled to Self-Directed Support (SDS) that they were not claiming:

“Through the social enterprise, we were taking in young adults to volunteer. But it transpired that they were in need of our support, rather than providing input.”

Bolster Community staff member

Bolster Community staff met with staff from a local health and social care Trust who advised that this service would meet the requirements for an SDS-purchased service, and in May 2022,

the Bolster Buddies service was launched. The service is aimed at promoting independence and improving life skills. Young people are paired with a Support Worker and become candle makers for the ACORN social enterprise. The service now generates an income of £150,000 (forecasted for this to be £180,000 by the end of this financial year) for Bolster Community. Staff noted that this hybrid approach – service provision paired with social enterprise, which they refer to as “Candles & Care” – as a key factor in their success over this period, and is expected to contribute to the organisation’s longer-term sustainability.

In addition, Bolster Community began to offer evidence-based training programmes for parents and children over this period, such as the [Friends Resilience programme](#), raising significant income (approximately £300,000) as part of a cross-border project. Currently the Public Health Agency and the Southern Health & Social Care Trust are commissioning a smaller number of these training programmes from Bolster Community.

Outcomes and impacts

Bolster Community staff members highlighted **the opportunity to focus on sustainability and longer-term growth** as a key outcome of the Dormant Assets NI funding, and the transformational impact this has had on their organisation.



We were so tight on driving resource in and down – we did not have time to drive it up and out.

Bolster Community staff member

“It’s a big culture change for the VCSE sector. That was made easier by the introduction of the Fund. For once, [through] having a dedicated fund aimed at financial sustainability, we could take a pop at things – we could attend trade fairs, make a pitch. Before this, we’d be arguing about representing our organisation at events. We were so tight on driving resources in and down – we did not have much time to drive it out and up. Dormant Assets NI gave us that conduit to think externally.”

Bolster Community staff member

- Dormant Assets NI funding has also played a key role in the success of the Bolster Buddies service: on the retail side, the consultancy and sales support is credited with leading to **sales** via the **development of an online shop and [website](#)**; while the Sales and Marketing Manager has focused on social media marketing to **create awareness of the service and the availability of SDS both to agencies and parents/carers**.

Bolster Community highlighted the delivery and expansion of the Bolster Buddies service as the most notable achievement over this period:

“[The] biggest outcome is the development of Bolster Buddies and long-term sustainability, both for us as an organisation, but also for the community. We’re already taking over a second

premises. [It has had] a significant positive impact on people, on place – and the pound. We're now bringing money in to recruit staff."

Bolster Community staff member

In relation to **financial sustainability**, Bolster Community reported that their **generated income** (through the provision of training programmes, Short Breaks Opportunities, and ACORN) **now accounts for 68% of their overall income**. Previously this had accounted for c. 30% of their income, having received most of their income via grant funding.

Bolster Community has also seen **significant growth in their social media reach** over the period July 2023 – July 2024, attributed to their recruitment of a Communications and Marketing Manager, as follows:

- Bolster Community's overall Facebook reach has increased by 47.6% (126.6K engagements)
- Bolster Community's overall Instagram reach has increased by 160.6% (22.9K engagements)
- Bolster Community's Facebook visits have increased by 106.6% (76.8K).

In terms of longer-term impacts, the income brought in to the organisation via Bolster Buddies and related SDS payments has enabled the organisation to **increase staffing roles** and **expand to a new premises to offer opportunities to more young adults**. Bolster Community has also made a **commitment to develop a marketing plan and further investment in sales and marketing activities** on a planned and sustained basis. They have also committed to building off this work by exploring ways to further diversify funding; this is outlined in the organisation's 2025-2030 Strategic Plan, which has recently been published. Under Strategic Objective 3 ('to develop innovative solutions to address health disparities'), it notes the following aim:

"Diversify funding sources by exploring new revenue streams, including social enterprises and grants."

Bolster Community Strategic Plan 2025-2030

Learning

Bolster Community summarised some key learning points related to their experience of the Dormant Assets NI funding, as follows:

- The importance of focusing **on external facing business development and marketing activity**, especially for an organisation that provides support to the community and may otherwise neglect this element in lieu of service provision:

“The thought of investing money in comms when it was all project [delivery] staff, and we needed more family support workers... but it’s integral to where we are now.”

Bolster Community staff member

- The potential to address the issues with recruitment for business development roles by adopting a **hybrid approach involving a mix of consultancy/bought in support and part-time in-house roles**.
 - Bolster Community noted that they have shared this learning with other organisations across the sector, suggesting to them that they could consider bringing in consultancy or shorter-term skills-led contracts and interim business support, rather than focusing on recruiting for one key business development role. A number of those they have shared learnings with are reported to have gone on to successfully receive funding through the Dormant Assets NI Fund.

This learning aligns with the themes of effective practice identified in the First Interim Evaluation Report for Dormant Assets NI; namely the importance of diversification of funding sources and the need to prioritise relationships and partnership working across multiple levels.

Crescent Arts Centre

• Case study summary

- The Crescent is an arts and cultural centre located in South Belfast. The organisation secured £30,950 from Dormant Assets NI to diversify its income streams. The project was expected to be delivered between November 2022 and July 2024.
- The grant was used to fund the development of a small retail display in the foyer of The Crescent's building in order to diversify its income streams. Specifically, the award was used for equipment/retail units and stock, artist costs, and consultancy support and training.
- The shop is already generating an income for The Crescent which can be reinvested into the organisation, achieving the key aim to diversify the organisation's income streams. The shop is also helping to promote / increase the visibility of the arts centre and has contributed to The Crescent's wider strategic ambitions to become more locally rooted and to improve its offer for tourists.
- As a result of the Dormant Assets NI funding, The Crescent has been able to deliver project activities associated with effective practice. These include:
 - Maintaining a flexible approach to delivery
 - Bringing in required skills to support delivery where required
 - Involving existing staff in delivering activities to support buy-in and engagement.
- Increasing internal capability to support the delivery of activities through training existing staff.

Introduction

The Crescent is an arts and cultural centre located in South Belfast, half a mile away from Belfast city centre. The Crescent's core activity is delivering courses, events and workshops covering all art forms, ranging from watercolour painting and poetry to yoga and British Sign Language. The centre also delivers the annual Belfast Book Festival, a Music Programme, Artist Residencies and wider support in the community through a youth programme and engagement with schools, and provides office space to nine creative companies. The Crescent is a company limited by guarantee, which employs 14 FTE staff and has an annual turnover of approximately £900k. Most of its income is generated from delivering events and classes, and around a third is from public sector grants.



The Crescent secured £30,950 from Dormant Assets NI to diversify its income streams by establishing a shop. Specifically, the award was used for equipment/retail units and stock, artist costs, and consultancy support and training. The project was expected to be delivered between November 2022 and July 2024. However, as set out in more detail below, delays in delivery meant that at the time of writing a small amount of funding was still to be spent.

This case study is based on a review of background documentation (including the interim progress report to The National Lottery Community Fund) and three interviews with key members of staff involved in the grant funded project.

Delivery

The rationale for applying to Dormant Assets NI was to enable the organisation to diversify its income streams. The idea of developing a retail offer to provide another source of unrestricted income¹ had emerged a few years prior to the funding opportunity, but it was considered too risky to pursue without external funding support. Whilst most of The Crescent's income is already unrestricted (i.e. from events/workshops), the organisation was seeking to further diversify its income streams to improve its resilience and sustainability.

The grant from the Dormant Assets NI Programme was used to fund the development of a small retail display in the foyer of The Crescent's Grade II listed building (see Figure 1, below). This involved the following activities:

- The purchase and installation of retail units and equipment in the foyer
- Liaison with artists to commission the use of their artwork/images on products
- Design and purchase of a first Edition² of products such as postcards, notebooks, tote bags and art materials for sale
- Staff training and development including events attended by the CEO and Communications Manager relating to contract management/intellectual property, sales and picture libraries, and all full-time staff were invited to participate in the product development process and attend meetings with the consultants³.

There was one planned project activity which The Crescent decided not to progress: the development of strategic plans. Initial conversations were held with several consultants, and the advice was to 'learn by doing.' Rather than spending time and money on developing plans, they proceeded with developing a retail offer. As a result, there is £2,400 in outstanding grant

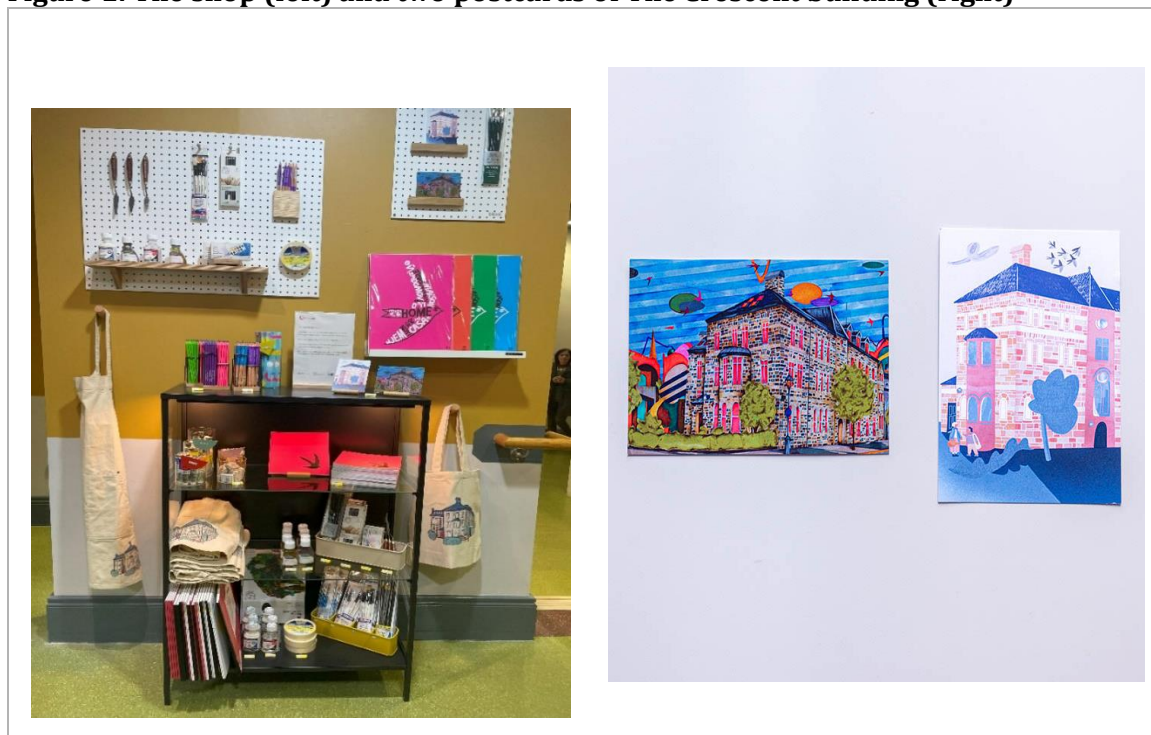
¹ i.e. income which can be used for any purpose by the organisation, rather than grant funding which has to be used for specific activities in line with the grant contract

² An 'Edition' is the term used when describing the complete collection of multiple artworks created within a single given series

³ Two consultants were engaged: one to support with research and analysis and contacting suppliers, and the other a business consultant to provide expert oversight.

funding to be spent by Friday 28 February 2025. The aim is to spend this on evaluation and development of recommendations for future Editions of the shop. Expenditure will include a detailed report looking at the shop's performance to date, and contribution to a second Edition of products as recommended by the report.

Figure 1: The shop (left) and two postcards of The Crescent building (right)



Source: The Crescent

Outcomes and impacts

The key aim to diversify the organisation's income stream has been achieved. Whilst modest to date (c. £5k in aggregate), the shop is already generating an income for The Crescent which can be reinvested into the organisation. Looking forward, the ambition is to increase sales. They are in the process of developing an online shop on their website (which will have a broader product offer), linking the shop to other areas of sales e.g. gift vouchers for courses & workshops, and exploring how to expand the shop by reimagining and redesigning the layout of the ground floor of the building.

In addition to providing an income, the shop also provides other benefits. All products for sale have a direct link to the organisation/building. Through purchasing products, people help to **promote the arts centre and increase its visibility**. Second, it has **contributed to The Crescent's wider strategic ambitions** to become more locally rooted and to improve its offer for tourists. All the products are designed by local artists, including staff at the arts centre. Furthermore, whilst there is currently no exhibition(s) for visitors, staff can talk about the products, which provides some narrative on the history of the building and organisation.

At an individual level, the grant has **delivered benefits for local artists** through commissioning their work to be featured on the products. It has supported (emerging) artists financially and has increased the visibility of their work.

The overall aim of Dormant Assets NI Phase 1 was to improve capacity, resilience and sustainability amongst VCSE organisations. There has been progress against this aim in relation to The Crescent. The shop has diversified their income by providing an additional source of unrestricted income, and therefore the sustainability and resilience of the organisation has improved. Furthermore, the capability of the organisation has improved through staff gaining new skills and knowledge in product development and sales.

Learning

The key factors that enabled the delivery of the project included:

- The **overall aim of the project was clearly defined**, and the project activities were designed to address a specific challenge facing the organisation. The focus on delivering a ‘tangible’ output (i.e. a new product range) was reported to have offered a stimulating change from the organisation’s usual focus on behavioural change.
- Linked to the above, **project activities were strongly aligned to wider strategic priorities**, notably ambitions for The Crescent to become more responsive to the local community and tourists. This included commissioning the designs of local artists only – including the artwork of some staff at The Crescent – to be used on the products.
- **Involvement of staff early in the process**. This helped to secure buy-in to the concept/process and supported skill development. It was also credited with ensuring staff are equipped with the necessary skills and knowledge to continue delivering the retail offer post-grant funding.
- **The design and delivery of the Dormant Assets NI Grant Programme was flexible and supportive**. For example, some project activities were delayed (as explained below) but The National Lottery Community Fund allowed the delivery timescales to be extended so that activities could be delivered in full.

The main challenge was that the project took longer to deliver than anticipated. This was attributed to several factors including:

- **Internal capacity constraints** – involving the team in delivery was important, but the team is small, and project related tasks were additional to their existing roles.
- **Inexperience in retail/sales, which meant insufficient time was allocated to tasks** (e.g. contractual/copyright discussions, the process of ordering and modifying sample products) at the application stage.

- **The key learning emerging is that it is important to set realistic timelines for delivering diversification projects.** At the project design stage, developing a timeline with flex for unexpected issues could help to mitigate against delays. It is also important that timelines allow staff with limited capacity to contribute to delivering project activities.
- **Another challenge was the limited space in which to locate the shop.** The shop has been positioned along one wall in the foyer near the front desk. It is only a small area, but the building is Grade II listed which restricts the ability of the organisation to alter the building's structure. The ability to expand the shop in future is therefore constrained. This said, options to overcome this are being considered currently by the management team (see below).

As a result of the Dormant Assets NI funding, The Crescent has been able to deliver project activities associated with effective practice⁴. These include:

- **Maintaining a flexible approach to delivery.** For example, The Crescent listened to the advice from external consultants to 'learn by doing,' rather than using resource to develop a strategic plan(s). Flexibility was also enabled by the programme design, allowing additional time for activities to be delivered due to delays.
- **Bringing in required skills to support delivery where required.** The Crescent identified gaps in their knowledge and skills (such as copyright) and sought to fill these by appointing expert consultants and attending training sessions/events. Bespoke training received was reported to have been particularly relevant to both the organisation and the project.
- **Involving existing staff in delivering the project to support buy-in and engagement.** Involving staff in project activity from the outset was considered fundamental by The Crescent's management team. For example, all full-time staff were invited to participate in the product development process. This supported buy-in during the project, and post-grant is expected to support staff commitment to the new venture.
- **Increasing internal capability to support the delivery of project activities through training existing staff.** It was important for The Crescent to enhance internal capability (in product development and sales), so that staff could support with the delivery of grant funded project activities. This improved capability is also expected to help the organisation to sustain and grow their retail offer in future.

⁴ As set out in SQW's Dormant Assets NI evaluation first interim report

Developing Healthy Communities

Case study summary

- Developing Healthy Communities (DHC) is a Derry based charity with a mission to promote health and tackle health inequalities. They received a £95,597 award through the Dormant Assets NI Grant Programme to fund a full-time Operations Manager post from January 2022 to January 2024.
- The Operations Manager modernised a number of DHC's policies, procedures and processes. These have helped to increase DHC's organisational capacity through more efficient systems, upskilled staff and improved staff morale.
- The Chief Executive and the Operations Manager worked together on diversifying DHC's sources of income. This resulted in successful grant funding bids to the Rank Foundation and the Ideas Fund. The Operations Manager worked with a colleague to develop DHC's social enterprise offer, increasing its revenue from corporate organisations. Organisation leads think it unlikely that this funding diversification would have been possible without the Operations Manager, given DHC's capacity constraints.
- In taking on operational responsibilities, the Operations Manager freed up the Chief Executive to undertake strategic initiatives. This included greater engagement with the World Health Organisation's Healthy Cities in Derry and Strabane initiative, along with strengthening relationships with other key strategic partners and local community development organisations.
- DHC's experience of the Dormant Assets NI funding has resulted in four key areas of learning, which may be transferrable to other VCSE organisations. These are:
 - be clear at recruitment about the skills and competencies needed
 - sharing learning and networking with other VCSE organisations is valuable
 - consider the capacity and resourcing implications for follow-on work
 - consider timescales for implementation and outcomes realisation, and plan for sustainability, at the outset.

Introduction

Developing Healthy Communities (DHC) is a Derry based charity with a mission to promote health and tackle health inequalities. DHC is a small organisation, employing c.15 staff, and works with a range of partner organisations in helping to deliver its activities. The organisation works across Northern Ireland (NI) to deliver a number of different initiatives, including:



- **The World Health Organisation (WHO)'s Healthy Cities in Derry and Strabane** - bringing business, community and public sector leaders together to promote the importance of health inequalities in public sector decision-making.
- **The Clear Project** - which supports a network of organisations working to prevent suicide, self-harm, and drug and alcohol misuse, through training, grants and capacity-building.
- **The Ideas Fund** - designed to help boost public health through developing and testing ideas for improved mental wellbeing.
- **Work Well, Live Well** - involving training of Workplace Health Champions, as well as consultancy and mentoring activities, to tackle health inequalities in the workplace.

DHC received a **£95,597 award through the Dormant Assets NI Grant Programme, awarded in August 2021**. The award was used to fund a full-time Operations Manager post from January 2022 to January 2024. Through the post, DHC aimed to bring in operational expertise to help modernise the organisation's ways of working, and to free up capacity of the Chief Executive to deliver strategic initiatives to support organisational resilience

This case study is based on interim and end of grant reports, DHC's own organisational impact report⁵, learning shared at the Dormant Assets NI Learning Event (March 2024), as well as interviews with two key members of staff within the organisation.

Delivery

The Dormant Assets NI award **funded the salary for a full-time Operations Manager**, responsible for delivering DHC's operational activities, and enabling the Chief Executive to focus on strategic priorities. The Operations Manager was recruited externally. The Operations Manager transformed DHC's ways of working, including:

- Updating policies and procedures
- Creating staff training and development plans
- Conducting a workplace restructure
- Implementing new digital systems (e.g. Salesforce as a new Grant Management System, Xero as an electronic accounting system)
- Introducing a new communications strategy and new website

⁵ [Developing Healthy Communities Impact report 2023-24](#)

- Overseeing delivery of some of DHC's day-to-day activity (including acting as the development coordinator for the Ideas Fund).

The Chief Executive and the Operations Manager **initially focused on income diversification**. Despite some initial difficulties, suitable funding streams were identified and applied for. This resulted in two successful bids, including three-year funding for a Digital Marketing Assistant from the Rank Foundation, and regional partnership funding from the Ideas Fund. It is considered unlikely that these funding opportunities would have been identified or had applications developed had the Operations Manager not been in post, given DHC's capacity constraints.

The Operations Manager worked with the Health@Work NI Programme Manager to develop DHC's social enterprise offer (called 'Team Health'), which provides bespoke employee health checks for employers. While this offer existed prior to the Dormant Assets NI funding award, it was only a relatively small part of DHC's work. The Operations Manager and the Programme Manager collaborated to develop branding and promotional materials, and developed the offer itself. The aim was to bolster an alternative source of income for DHC, and expand activities funded by the private sector.

DHC underwent a period of transition between September 2022 to March 2023. This included the appointment of a new Chief Executive, staff relocation and a subsequent workplace restructure. In March 2023, DHC experienced a cyber-attack. In response, the Operations Manager worked with a new IT infrastructure partner to **improve DHC's systems and protect the organisation from similar threats in future**.

Outcomes and impacts

Realised outcomes and impacts

As a result of project activities delivered by the Operations Manager, **DHC has implemented a number of new structures and processes**. Examples include monthly team meetings, several electronic management systems, and organised team events. While the Operations Manager has now left the organisation, these processes have been sustained and are **credited with enabling the organisation to operate more efficiently, freeing up capacity**.

The changes were also credited with enhancing **the organisation's culture of improvement**. For example, the training and development plans for staff helped to identify suitable training opportunities, which were then pursued. These included leadership and management qualifications for senior members of staff. As well as fostering an improvement culture, these were credited with equipping the organisation's leaders with enhanced skills and capabilities. One example included a senior staff member undertaking an ILM Level 5 Leadership & Management qualification, improving their leadership skills and developing their strategic thinking.

Ensuring organisational financial stability was a key objective of the grant funded project activity. The Operations Manager worked alongside others to review budgets and identify alternative funding streams (securing funding from the Rank Foundation and the Ideas Fund, as described above). The Digital Marketing Assistant remains in post and has helped to support the growth of DHC's social enterprise offer, including working with others to develop branding and promote Team Health on social media. As a result, DHC increased the number of workplaces it engaged with for its workplace employee health check offer. Prior to the rebrand, Team Health only had a handful of workplaces receiving health checks; this increased tenfold as a result of the rebrand, generating additional non-grant income for the organisation. Team Health has since scaled down following the departure of the Operations Manager, due to lack of capacity and resourcing to manage the scheme.

In addition to securing funding for a Marketing Assistant post, the Operations Manager supported the Chief Executive to **secure funding and deliver activity for the Ideas Fund regional partnership** in NI. The new regional partnership is a c.£90k collaboration between DHC, Ulster University and the North West Community Network, who are working together to help foster partnerships between community groups and academia, in an effort to support more equitable practice across the VCSE sector.

The funding for and recruitment of the Operations Manager enabled the Chief Executive to **spend time engaging with strategic partners**, including Derry City and Strabane District Council, Ulster University, the NI Public Health Agency, and the WHO's Healthy Cities Network, as well as local community development organisations such as the Neighbourhood Renewal Health Improvement Project. These engagements are reported to have built the profile of DHC and led to their involvement in several strategic projects aiming to improve local health and wellbeing.

Figure 2: DHC at Ulster University (left) and at WHO Healthy Cities Network (right)



Source: Developing Healthy Communities

Long term outcomes and impacts

The Ideas Fund regional partnership funding is for an initial two years, and the **relationships and networks established through the work are expected to have a longer-term legacy**. An output from this work is the Communities Research and Innovation Collective, a collaborative community and researcher forum, spanning organisations throughout NI. It is expected that this longer-term partnership will lead to stronger resilience for the community sector as a whole, by fostering collaboration and continuing the translation of ideas and knowledge from academia into VCSE organisations, and **in turn aid the continued delivery of innovative initiatives to address health inequalities**.

The Operations Manager assisted in the planning, organisation and hosting of a major annual WHO conference in Derry in September 2022 and 2023, involving stakeholders from the UK and the EU. In November 2023, DHC was represented at WHO's Healthy Cities global conference in Utrecht. The learning derived from these events is credited with **enhancing DHC's understanding of the WHO Healthy Cities Framework**. This learning has informed work with Derry City and Strabane District Council, with whom DHC is collaborating to deliver on the Healthy City agenda. It also helped to **promote DHC on an international stage**.

Overall, Dormant Assets NI funding enabled DHC to address many of the challenges it was experiencing prior to receiving the grant. The Operations Manager post that was funded introduced a range of new policies and procedures which are credited with helping DHC to become a more efficient organisation. The organisation's capability has also been enhanced

as a result of the learning and development plans introduced and the associated training undertaken by staff.

Despite the improvements, capacity for strategic planning and activity going forward remains constrained. DHC are seeking alternative funding to support core costs.

Learning

As a result of the Dormant Assets NI funding, DHC has been able **to deliver project activities associated with effective practice**. These include:

- Activity delivered directly by the Operations Manager post: the delivery of strategic and operational planning (through a new marketing strategy and digitisation of existing processes), the diversification of funding sources and investment in staff training and development
- Activity delivered as a result of other staff having more capacity: relationship building, partnership working and strengthened leadership and management.

DHC's experience of the Dormant Assets NI funding has resulted in four key areas of learning, which may be transferrable to other VCSE organisations. These are:

- **The importance of being clear about the skills and competencies needed, to inform recruitment.** The skillset of the Operations Manager was credited with leading to successful delivery of the planned project. In particular, it was noted how the postholder's broad ranging knowledge and skills across many functional areas (including HR, Finance, Procurement, IT), ability to learn quickly (i.e. regarding Cyber Security), and ability to think strategically were all central to the achievements realised. The Operations Manager's previous experience informed their work to modernise DHC's processes and systems, and DHC staff noted how this modernisation has helped to develop the organisation's culture into one which embraces change.
- **Sharing learning and networking with other VCSE organisations is valuable.** The Operations Manager attended three Dormant Assets NI workshops for grant holders, designed to share learning from project delivery, reflect on organisational challenges, and encourage networking between VCSE organisations. Following an online workshop in late 2022, DHC collaborated with the Derry Playhouse (another Dormant Assets NI recipient) in its Creative Healthy City work to integrate arts and culture in addressing health challenges.
- **Carefully consider the capacity required for associated or follow-on work.** Dormant Assets NI provided funding for the core costs for the Operations Manager post. However, the work the postholder drove forward led to an increase in activity for DHC. For example,

new partnerships formed resulted in the emergence of new projects and workstreams, which required staff time for delivery.

- **Consider implementation and outcome realisation timelines and sustainability planning at the outset.** It takes time for new roles and postholders to become embedded into an organisation, and for the benefits of strategic activity to be realised. Interviewees suggested that funding the Operations Manager post for a longer period may have enabled the role to become self-sustaining, by providing more time for the postholder to further develop income streams for the organisation.
- DHC has begun to share some of its learning around organisational change with other VCSE organisations, including via a learning event held by The National Lottery Community Fund in March 2024, at which DHC shared learning around project delivery with other Dormant Assets NI grant holders.

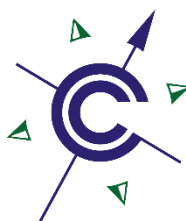
The Centre for Cross Border Cooperation

Case study summary

- The Centre for Cross Border Cooperation is an independent organisation committed to cooperation across the Republic of Ireland and NI, as well as between the island of Ireland, Great Britain, and Europe. To do this, it conducts research and analyses relevant policy to consider what the implications may be for North-South (NI-ROI) and East-West (GB-IE) issues.
- The Centre for Cross Border Cooperation received a £39,561 grant to develop its online presence and diversify its sources of income. The intention of these activities was to allow the Centre to hold high quality ('professional standard') online events, increase awareness of their work to a wider audience and ultimately help them to build more partnerships, in order to become more financially sustainable. The project was delivered over a three-year period, spanning May 2021 to June 2024.
- The project began during the Covid-19 pandemic, limiting in-person events. The Centre adapted by enhancing virtual meeting capabilities, which were already of interest in order to reduce travel and carbon emissions.
- The Centre reported a number of outcomes achieved through the project:
- Purchasing a suite of digital equipment and redesigning the website created a step-change in the organisation's professionalism, visibility, and reputation.
- Increase in unrestricted income through a greater number of and more high value sponsorships for its Annual Conference.
- Improved online capabilities increased the credibility and professionalism of events, leading to higher production quality of online events and larger audiences.
- Improved social media presence and increased profile attracted new supporters to the New Common Charter for Cooperation Within and Between these Islands, including eight new supporters in the final year of the project.
- Staff expansion from four to six members, including the appointments of a Research Programme Development Manager and a Projects Coordinator, which were made possible by increased revenue streams generated through the project.
- Without the project funding, they would have taken a more piecemeal approach to digital technology investments instead of purchasing a comprehensive suite of technology and software. Without Dormant Assets funding, the organisation believes that none of the outcomes would have been realised. The Centre's previous activities were considered incomparable to their current state. The Dormant Assets funding was credited with having a transformational effect, allowing the Centre to engage in more work, with more partners, and to a higher quality.

Introduction

Born out of the signing of the Belfast (Good Friday) Agreement in 1998, the Centre for Cross Border Cooperation (hereon referred to as ‘the Centre’) is an independent organisation committed to cooperation across the Republic of



**Centre for
Cross Border Cooperation**

Ireland (ROI) and Northern Ireland (NI), as well as between the island of Ireland, Great Britain, and Europe⁶. To do this, it conducts research and analyses relevant policy to consider what the implications may be for North-South (NI-ROI) and East-West (GB-IE) issues – spanning health, education, transport, business and trade⁷. Informed by its research, the Centre also delivers a series of projects designed to address issues relevant to the NI’s borders.

Given its commitment to cooperation, a large focus of the Centre’s activities involves the facilitation of meetings and events, bringing together relevant stakeholders and communities. A major event for the Centre is its Annual Conference, which invites policy-makers, academics, and civil society to consider how the current commitment to cooperation, mobility and relations within and across nations can be sustained in light of new challenges.

The majority of the Centre’s funding is allocated to specific research projects, supported by core funding from Ireland’s Department of Further and Higher Education, Research, Innovation and Science (DFHERIS), and supplemented by income from the Centre’s provision of Secretariat services to the Standing Conference on Teacher Education, North and South (SCoTENS) and Universities Ireland.

The Centre for Cross Border Cooperation applied for Dormant Assets funding in an effort to diversify its income streams and develop digital capabilities within the organisation. It received a £39,561 grant to develop its online presence and diversify its sources of income. The intention of these activities was to allow the Centre to hold ‘professional standard’ online events, increase awareness of their work to a wider audience and ultimately help them to build more partnerships, in order to become more financially sustainable. The project was delivered over a three-year period, spanning May 2021 to June 2024.

This case study is based on interviews with four members of the Centre for Cross Border Cooperation, conducted during an in-person visit to their Armagh premises in April 2025, and a review of relevant documentation, including three programme progress reports and their response to the evaluation survey.

⁶ <https://crossborder.ie/>

⁷ Centre for Cross Border Cooperation (2024) [Annual Report 2023](#)

Delivery

The three-year plan for the project focused on two main strands of work:

- **Improving the Centre's online capabilities.** This was to be achieved through a series of activities including the purchase of new IT equipment for hosting hybrid events, redesign of the Centre's website, and provision of training to build in-house digital skills.
- **Diversification of revenue streams.** This was to be achieved through acquisition of external expertise to undertake a marketing campaign and events management – with the ambition to attract sponsors for its Annual Conference and new advertisers for its Journal of Cross Border Studies in Ireland.

The project commenced in the midst of the Covid-19 pandemic, limiting in-person events which could be hosted and attended by the Centre. Given the circumstances, the Centre needed to adapt in order to successfully deliver its events and continue to engage with its audience. Increased virtual meeting capability had been of interest prior to the Covid-19 pandemic, given that the Centre's work spans across nations, and there was a desire to limit travel where possible in order to minimise the organisation's carbon emissions. However, organisation representatives report that they would not have been able to invest in digital technology to the same extent as they have been able to through the project, and so may have adopted a more piecemeal approach compared to purchasing a suite of technology and associated software.

Other factors influencing delivery of the project included:

- Political issues – following the UK's exit from the European Union, a significant number of organisations became involved in North-South cooperation issues, presenting challenges in maintaining the Centre's profile.
- Staff retention challenges – during the project, the Centre had two members of staff leave the organisation. Staff retention is a common challenge within the VCSE sector, and specifically in the sector in NI. One staff member has since returned to assume a new position within the Centre.

The project involved collaboration with a number of private and public sector organisations. These included two marketing agencies contracted to run publicity campaigns for the annual conference, a digital agency responsible for the website redesign, and audio visual expertise for running live events. Through engaging with these partners, it was reported that there had been increased knowledge building within the Centre, and that the knowledge has been relevant to ongoing and future Centre activities (e.g. social media campaigns, other live events etc.). This meant that the Centre also had lower than anticipated spend on digital skills training, because they were able to gain skills as a result of collaboration with these external agencies. This funding was reallocated to the contracting of specialised expertise to produce

reports and briefing papers on specific aspects of the changing context for North-South and East-West cooperation.

Outcomes and impacts

The project funded via the Dormant Assets NI Phase One Grant Programme has resulted in a number of outcomes for the Centre, both already realised and expected in future.

Being able to purchase a suite of digital equipment, as well as website redesign, was felt to have created a step-change in the organisation's professionalism, visibility and reputation. This has aligned well with the recent renaming of the Centre (from 'Studies' to 'Cooperation'), which overtly states the organisation's commitment to being an outward-looking and facilitating organisation, as opposed to an academic one.

A primary outcome from the project has been an increase in unrestricted income. This has come about through increased sponsorships, rising from one or two sponsors before the project, increasing to six in 2022, seven in 2023, and ten for the 2024 conference. Not only has the number of sponsorships grown, but so too has the value of these sponsorships. This was felt to have been a product of both the increased online capabilities, and the marketing activities undertaken. The marketing activity helped to raise awareness of the Centre's work, helping them to engage with new partners. Improving the Centre's online capabilities increased the credibility and professionalism of its events, meaning events delivered were of a higher production quality and reached a larger audience.

Increased visibility for the Centre has also resulted in a greater diversity in their organisational partnerships. Recent examples of new partners include the Department of the Taoiseach and the Cross Border Partnership: Employment Services (funded by the European Commission). Representatives from the Centre are attending more high-profile events too, such as the inaugural St Patricks' reception at 10 Downing Street in March 2025, and the EU's Forum for Peacebuilders event in Belfast later this year.

Interviewees report that the Centre is now fully equipped - both in terms of the relevant skills and the hardware. This is credited with enabling delivery of activities in whatever format is most appropriate. As a result of internal skill development through engaging with external partners, the Centre's social media presence has been improved, and has enabled the Centre to increase its audience substantially on X/Twitter, Facebook and LinkedIn. For example, the Centre's following on X/Twitter has increased from approximately 1,500 before the project, to over 3,700 currently. The improved social media presence and increased profile of the Centre's activities attracted new supporters to the New Common Charter for Cooperation Within and Between these Islands, including eight new supporters in this final year of the project.

Similarly, the increased ability to publicise its research is credited with leading to the Centre being engaged in more work. Since the project, the Centre has been successful in securing

PEACEPLUS funding⁸, and become a partner in the EPIC Futures NI project, led by Ulster University⁹. It has also engaged with new partners including Belfast City Council and other VCSE organisations, to help them address issues they face relating to cross-border cooperation.

When the Centre initially applied for Dormant Assets grant funding, the Centre employed four members of staff. Now it consists of six, including the appointments of a Research Programme Development Manager and a Projects Coordinator. This expansion has been made possible by the increase in revenue streams, which has in turn come about by the increased profile of the Centre's activities and research work, resulting from activity funded by the Dormant Assets project. It is also a reflection of the need to have the required capacity to exploit the increased opportunities that have arisen due to the project's impacts.

Without Dormant Assets funding, interviewees felt that none of the outcomes reported would have been realised. Before the project, the Centre already had an online presence and held an annual conference. However, the quality and profile of these activities were considered incomparable to their current state, thanks to the funding. It was felt that the Centre may have steadily invested in some of the activities funded through Dormant Assets, but that such an approach would have meant that benefits were realised more slowly and on a smaller scale. As a result, the Dormant Assets funding was felt to have had a transformational effect, allowing the Centre to engage in more work, with more partners, and to a higher quality.

Although not a direct output from the Dormant Assets funded activity, the Centre has also recently undertaken an organisational strategy review, to ensure the longer-term sustainability of the organisation. This included identifying potential opportunities (e.g. for staff development) and risks (e.g. staff turnover), and putting in place actions to future-proof the organisation. Although the project did not fund this activity, interviewees believed it emerged partially as a result of the project's strategic nature, by stimulating new thinking about the organisation's operations. They felt this would be sustained and continually revisited in the future.

Going forward, the benefits resulting from the Dormant Assets funded project are expected to continue to grow.

Learning

As a result of the Dormant Assets NI funding, the Centre for Cross Border Cooperation has been able to deliver activities associated with effective practice¹⁰. These include:

- **Prioritised relationship and partnership working at micro, organisational and macro levels.** Through the Dormant Assets project, the Centre has developed a number

⁸ <https://crossborder.ie/what-we-do/projects/s225/>

⁹ <https://www.epicfuturesni.org/>

¹⁰ As set out in Annex D.

of new relationships and partnerships, as well as having strengthened existing partnerships too. This is particularly important given the Centre's central purpose as a conduit for collaboration, meaning the more partners it is able to engage with, the better it is able to deliver its services.

- **Diversification of funding sources.** Linked to the new relationships built through the project, the Centre has diversified the numbers and types of partners it now works with. By strengthening sponsorship as source of funding, the Centre has been able to increase its unrestricted income, ultimately helping to provide greater independence and financial reserves.
- **Investment in staff and volunteer recruitment and training.** The case study demonstrates how investing in internal capacity and capability can make a significant difference to an organisation's performance. Interviewees noted that the project had helped the Centre to 'raise the standard' in relation to how they publicise their research, facilitate meetings and events. Not only does this result in better outcomes for people benefitting from the Centre's activities (i.e. those affected by cross-border issues), but also for the Centre's staff, who have been able to upskill.

Other key learning from the project includes **the importance of preparing for success and understanding legacy costs.** As the Centre's profile has risen, so too has the amount of activity it is engaging in. In response, the Centre has recruited two new roles to deliver increased activity. The Centre is also keenly aware as to the implications of the project in the longer-term (e.g. the recurring cost of servicing hardware initially purchased using Dormant Assets funding, licence fees for associated software etc.), and is taking this into account for its future planning.

Samaritans in Northern Ireland

Case study summary

- Samaritans is a UK & Ireland based charity providing emotional support to those in distress or at risk of suicide, with a vision to reduce suicide rates. Operating 201 volunteer-run branches across the UK and Ireland - including 24 branches with over 2,000 volunteers across Ireland and Northern Ireland - Samaritans offers 24/7 support and suicide prevention programmes.
- The NI office has only three staff members. Increased demand for services, compounded by political instability and high unemployment, highlighted a need for more volunteers.
- In an effort to address these challenges, Samaritans in Northern Ireland were awarded a £85,500 grant through the Dormant Assets NI Phase One Grant Programme to develop a sustainable income stream to support their core costs and NI branches. Over two years, the project sought to develop a workplace training programme which can be delivered by Samaritans volunteers to organisations across NI, to generate income. The project was delivered between January 2023 and January 2025.
- Using the funding, Samaritans in Northern Ireland developed a 'Mental Health Awareness in the Workplace' training programme. Once the training programme had been developed and volunteers had been trained in delivery, Samaritans in Northern Ireland worked with a marketing and communications consultant to create and print promotional materials, designed to help raise awareness among organisations.
- Through the project, Samaritans in Northern Ireland has significantly increased the number of businesses which it engages with. Samaritans in Northern Ireland has delivered 25 'Mental Health Awareness in the Workplace' training sessions to 250 employees, generating an additional £6k in unrestricted income. The project has also generated some benefits which they are confident will be sustained in the longer-term. Samaritans' volunteers who received the training will continue to be able to incorporate learning into other training they deliver in future.
- The training has also helped to raise the organisation's profile in NI, and new relationships established through the project are expected to lead to future donations and fundraising opportunities. Workplaces which received the training have benefitted from increased mental health awareness, which is expected to ultimately help to reduce the number of people who die by suicide.
- While the project was delivered largely as intended, additional income generated to date is not as expected, for a number of reasons. These included tough economic conditions for businesses, a highly competitive market with multiple charities providing similar training at subsidised rates or for free, longer than expected lead times to convert interest into confirmed bookings, and loss of the consultant who had been coordinating the training. The organisation is not proactively promoting the programme but it is available for businesses who contact them directly.

Introduction

Samaritans is a UK & Ireland based charity which provides emotional support to anyone in distress, struggling to cope, or at risk of suicide¹¹; their vision is that fewer people die by suicide. To achieve this, the organisation operates a network of 201 branches across the UK and Ireland, offering a safe place for people to talk 24/7, as well as delivering a series of programmes aimed at suicide prevention (e.g. the Listeners scheme for prisoners, talks in schools, etc.). Each branch is volunteer-run, and Samaritans has more than 23,000 volunteers across the UK. Samaritans in Northern Ireland supports the central charity in delivering its services within the island of Ireland, spanning 23 locations and 2,000 volunteers across NI and the Republic of Ireland¹².



While the network of volunteers is large, the number of paid staff working centrally is relatively small – the NI office is made up of three members of staff. Funding for Samaritans' operations is shared across regions, and generally reliant on public donations, grants and legacy funding. In 2023/24, Samaritans reported a £1.1m decline in income compared to the previous financial year, largely driven by a fall in donations resulting from cost-of-living pressures¹³. These challenges are anticipated to persist going forward, linked to wider economic uncertainty across the UK.

Financial challenges are particularly acute in NI. In 2023, the Department of Health halved its Core Grant Scheme for community and voluntary groups (from £3.6m to £1.8m), and Samaritans in Northern Ireland lost its core funding as a result¹⁴. At the same time, the impact of budget cuts on the wider sector has increased demand for Samaritans' services. Its recent Lost Futures research emphasises poverty and financial hardship as key risk factors for suicide¹⁵. These challenges are compounded by political instability and NI-specific contextual factors, including the legacy of conflict-related trauma and high levels of unemployment within certain communities¹⁶.

In addition to these financial challenges, Samaritans in Northern Ireland also faces significant barriers related to volunteer recruitment. The Samaritans strategy identifies increasing its volunteer capacity as a key priority in the coming years, if it is to meet rising demand for its services¹⁷. Moreover, Samaritans in Northern Ireland is seeking to engage with its people in

¹¹ <https://www.samaritans.org/>

¹² <https://www.samaritans.org/samaritans-ireland/>

¹³ Samaritans (2024) [Samaritans Annual Report and Accounts 2023/24](#)

¹⁴ Department of Health (2023) [Department details 2023/24 Budget measures](#)

¹⁵ Samaritans (2025) [Lost Futures: Poverty, Inequality and Suicidality in Northern Ireland](#)

¹⁶ Samaritans (2025) [Lost Futures: Poverty, Inequality and Suicidality in Northern Ireland](#)

¹⁷ Samaritans (2022) [Tackling suicide together: providing a safe space in uncertain times](#)

new ways, including through a currently piloted web chat service, meaning it is seeking to build a more diverse range of skills within its volunteer pool.

In an effort to address these challenges, Samaritans in Northern Ireland applied for and was awarded a £85,500 grant through the Dormant Assets NI Phase One Grant Programme to develop a sustainable income stream to support their NI branches. Over two years, the project sought to develop a workplace training programme which can be delivered by Samaritans volunteers to organisations across NI, which is intended to generate income as well as raise awareness regarding mental health in the workplace. The project commenced in January 2023, and was completed by January 2025.

Delivery

Prior to the project, Samaritans Central Charity already offered a Mental Health Awareness training programme. In NI, branches typically provided basic training free of charge, with a primary focus on public sector organisations. The workplace training programme was designed to help participants recognise the signs of vulnerability, tips on active listening, and how to support emotional health in the workplace. The programme varied in terms of its content across branches, and was reliant on the capacity of branch staff to schedule the sessions.

Samaritans in Northern Ireland was seeking to develop a workplace training programme that would promote Mental Health Awareness in the workplace, that they could offer to workplaces across NI and therefore generate income for their organisation. Initially, the project intended to recruit a Marketing Manager to help develop and coordinate the planned workplace training programme. However, challenges with finding a suitable person to fill the role, and the limited period of time to deliver the project, led to Samaritans in Northern Ireland instead contracting a Marketing and Communications consultant. The focus of the Marketing and Communications consultant was to run an end-to-end marketing campaign for the programme, and manage the relationships with organisations interested in the training.

Samaritans in Northern Ireland began by refining its existing workplace training programme to make it more standardised and professional, ensuring it better aligned with the expectations of corporate clients. Once it had been adapted and volunteers had been trained in delivery, Samaritans in Northern Ireland worked with the consultant to create and print promotional materials, outlining the objectives of the training programme, benefits of the training, and details for scheduling a session. The campaign specifically targeted the private sector, with marketing materials and messaging tailored towards the needs of corporate organisations. To supplement these materials, the consultant conducted a series of marketing and outreach activities to generate interest in the programme amongst businesses. This included a digital campaign, regional press coverage, and promotion via key partnerships including the Business Eye (a leading NI business magazine) and the Federation of Small Businesses.

Outcomes and impacts

Through the project, Samaritans in Northern Ireland has significantly increased the number of businesses which it engages with. They engaged with 124 new businesses during the project, including major employers such as Moy Park, Bank of Ireland and Kainos (a Belfast IT firm). In doing so, Samaritans in Northern Ireland has delivered 25 'Mental Health Awareness in the Workplace' training sessions to 250 employees in total, generating an additional £6k in unrestricted income.

While the workplace training programme has come to a close, the project has generated benefits which are expected to be sustained in the longer-term. Samaritans volunteers who received the training will continue to be able to incorporate learning into other training they deliver in future. The training has also helped to raise the organisation's profile in NI, and new relationships established through the project are expected to lead to future donations and fundraising opportunities. Workplaces which received the training have benefitted from increased mental health awareness, which is expected to ultimately help to reduce the number of people who die by suicide.

A secondary benefit of delivering the training has also been in volunteer recruitment. At the end of the training session, volunteers delivering the training give an overview as to different ways in which individuals and organisations can get involved with Samaritans. It was noted that there have been some instances where individuals who have received training have then gone on to become involved in volunteering opportunities at NI branches. This has helped to address some of the volunteer recruitment challenges which Samaritans in Northern Ireland is facing.

Moreover, while there is limited capacity to coordinate the workplace training within the NI office, the training programme and materials developed through the project have been shared with the central Samaritans Ireland team (based in Dublin). This central team is currently identifying opportunities to roll out the programme within the Republic of Ireland (ROI), informed by learning from the NI project. Because Samaritans Ireland spans the island, the NI office and branches will benefit from additional income generated by colleagues in the ROI.

While the project was able to deliver largely as intended, additional income generated to date is not as expected. This is thought to be due to a number of reasons:

- **Economic challenges:** tough economic conditions for businesses were felt to have limited their ability to invest in external training provision.
- **Market saturation:** there was found to be many other charities provided similar training at subsidised rates or for free.
- **Converting interest to income:** Samaritans in Northern Ireland has successfully engaged with 124 new businesses through the project, but not all of the engagements led

to paid training. There were longer than expected lead times to convert interest into confirmed bookings too, as businesses often required multiple touchpoints before committing to paid training.

- **Loss of consultant and limited internal capacity.** With the project's conclusion, Samaritans in Northern Ireland has ceased collaboration with the consultant who managed enquiries and scheduled training sessions. Due to the consultant's departure and the NI office staff having other demands on their time, the paid workplace programme is currently not being promoted, although it is available for organisations which contact them. The organisation is currently developing capacity in-house to promote the training. It is possible that the limited internal capacity may also have had an impact on converting interest to income, as outlined above, coupled with the difficulties in recruiting a Marketing Manager who could have supported further income generation.

Learning

As a result of the Dormant Assets NI funding, the Samaritans in Northern Ireland has been able to deliver activities associated with effective practice¹⁸. These include:

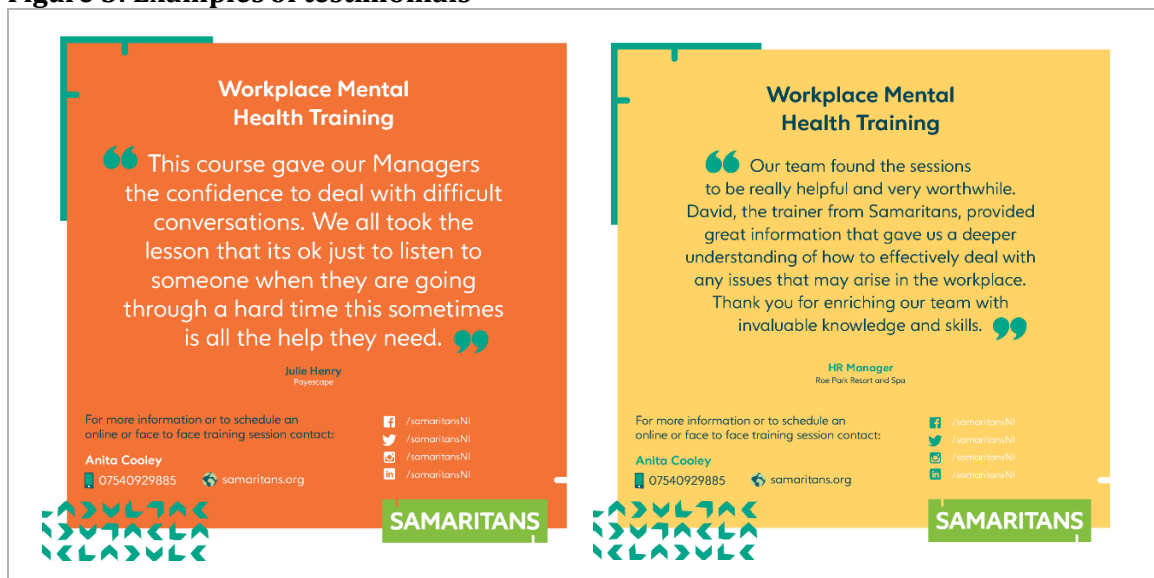
- **Relationship and partnership working at micro, organisational and macro levels.** Samaritans in Northern Ireland engaged with a number of new partners as a result of the workplace training programme. Even for organisations which did not participate in the training, it was felt that increased awareness of Samaritans in Northern Ireland's activities will contribute towards the organisation's future resilience, by providing a stronger foundation for collaboration and support across sectors.
- **Delivery and demonstration of impact and social value.** The evidence demonstrate that VCSE organisations need to market themselves effectively to attract supporters, donors and funders. It was noted that testimonials (such as the examples below) were important for helping to promote the value of the workforce training programme to potential participant organisations. This content was used as part of the programme's PR and digital engagement efforts, and felt to be essential in raising awareness and establishing credibility, particularly within a crowded market.

Separately, there was felt to be learning in relation to the **importance of visibility and coordination of activity within the VCSE sector**. One of the unanticipated factors thought to have influenced the success of the project was the level of competition within the VCSE sector in offering workplace mental health awareness training. For projects which are seeking to generate income from the private sector, it is important to understand the extent of demand for these services, and the number of other organisations offering similar services.

¹⁸ As set out in Annex C of the final evaluation report.

Similarly, a Marketing Manager may have been able to support in this regard, but as outlined above, the organisation experienced difficulties in recruiting to this role.

Figure 3: Examples of testimonials



Source: Samaritans workforce training programme testimonials

Vault Artist Studios and Belfast Tool Library

Case study summary

- This case study covers two organisations – Vault Artist Studios and Belfast Tool Library - because they are co-located and have both used their Dormant Asset grant to increase the capacity of their organisations.
- Vault Artist Studios (hereafter referred to as 'Vault') is Belfast's largest provider of affordable studios for artists. The organisation secured £100,000 from Dormant Assets NI to appoint a full-time General Manager to support the organisation to become more sustainable and resilient. Grant-funded activities are being delivered over three years, from November 2023 to October 2026.
- As a result of the grant funding, Vault has been able to deliver activities associated with effective practice, including delivery of strategic planning, investment in staff recruitment and training, and relationship building and partnership working.
- The capacity of the General Manager has supported the organisation to formalise its staffing structure, enhance the skills and knowledge of staff, implement new and improved structures, processes and policies, and increase its income. More broadly, the additional staffing capacity has enabled Vault to progress towards identifying more buildings (with more secure tenancies) which is a core aim of the Business Plan.
- Belfast Tool Library is a tool lending library. The organisation secured £99,843 from Dormant Assets NI to improve their capacity and financial sustainability by recruiting two part-time employees. Grant-funded activities are being delivered over three years from June 2022 to July 2025.
- As a result of the grant funding, Belfast Tool Library has been able to deliver activities associated with effective practice, including the diversification of income streams, investment in volunteer training, and relationship building and partnership working.
- The recruitment of two part-time staff has supported Belfast Tool Library to increase its unrestricted income and improve the quality and retention of volunteers. The additional capacity has also enabled the organisation to respond to networking and collaboration opportunities, which is leading to new and/or improved relationships.

Introduction

This case study covers two organisations – Vault Artist Studios and Belfast Tool Library - because they are co-located in a building in north west Belfast, and they have both used their Dormant Assets NI grant to increase the capacity of their organisation. There are also synergies between the organisations, including their focus on community engagement, their complementary activities, and crossover of members (and formerly Board members). Each organisation is introduced below.

Vault Artist Studios

Vault Artist Studios ('Vault') is located across two sites in Belfast city centre and north west Belfast. Vault opened in 2017 and is Belfast's largest provider of affordable, multidisciplinary art studios. It currently provides space to c.100 members across all types of arts, including visual artists, writers, performers, musicians, dancers, and circus artists. Vault also hires out a gallery/project space and dance studio and delivers a range of community facing events and programmes (such as an annual Christmas market). The organisation is a registered charity, employs five members of staff and has three freelancer posts (equivalent to 4 FTEs).

Around half of the Vault's income is unrestricted¹⁹ (mainly from studio rental income and room hire), with the remaining half from grants.



Vault secured £100,000 from the Dormant Assets NI Phase 1 Grant Programme to become a more resilient and sustainable organisation, by recruiting a full-time General Manager with responsibility for delivering the remainder of Vault's five year business plan (2023-27). The grant is being delivered as planned over a three-year period between November 2023 and October 2026.

Belfast Tool Library

Belfast Tool Library ('BTL') opened in 2019 as the first tool lending library in NI. It was initially located in the old woodwork workshop in the Vault's previous building (a former college building 2km from Belfast city centre), until it relocated (with Vault) in June 2023 to West Belfast. It is a membership organisation whereby members borrow tools, and both members and non-members can access a range of workshop classes to learn and develop practical skills. The organisation is not-for-profit and is a registered charity. It employs two part-time staff supported by a team of 37 volunteers.



BTL has received two grants (a set-up grant from the National Lottery Awards for All scheme, and the Dormant Assets grant), with the remainder of its income generated from membership income and workshop classes.

BTL secured £99,843 from the Dormant Assets NI Phase 1 Grant Programme to improve their capacity and financial sustainability by recruiting two part-time employees to: a) increase

¹⁹ Income which can be used for any purpose by the organisation, rather than grant funding which has to be used for specific activities in line with the grant contract

membership and b) recruit more, and maximise the skills of, volunteers. The grant funded activity is being delivered as planned over a three-year period between June 2022 and July 2025.

This case study

The case study is based on:

- Vault: a review of background documentation (including the interim progress report to The National Lottery Community Fund and Vault's Business Plan 2023-27) and three interviews with key members of staff/artists involved in the grant funded activity.
- BTL: one interview with a trustee and co-founder involved in the grant funded activity.

Reflecting that the grant funding activity is being delivered separately, the information on each organisation and their project is presented in turn below.

Vault Artist Studios

Delivery

The overarching aim of the grant was to support Vault to be more resilient and prepared for the future. The grant was intended to fund the recruitment of a General Manager responsible for delivering the remainder of Vault's five-year business plan. By 2027, the aim is for Vault to be operating out of four buildings in different areas of the city, providing studio space to 250 artists and providing spaces for local communities to engage in arts. The income generated from the actions in the business plan is expected to enable Vault to continue to be financially independent and ensure the sustainability of the organisation.

The grant from the Grant Programme has been used as planned to recruit a new full-time General Manager. The General Manager appointed had previously provided freelance managerial support to the organisation, but formalising their role has unlocked additional capacity and authority. The General Manager's role includes managing all day-to-day operational work, working alongside the Board to update processes/procedures and deliver the business plan and strategy, networking and collaborating with stakeholders, and searching for new premises. The General Manager also managed the ongoing process of settling the organisation into new buildings – Shankill Road Mission and Marlborough House – after they had to vacate their former premises.

The key factors that are reported to have worked well include:

- The background, knowledge and skills of the General Manager: the appointed General Manager is an artist, one of the founding members of Vault, and previously provided freelance managerial support to the Vault. Therefore, they fully understand the

organisation's history and vision. The individual is also highly skilled in bid writing and has been able to draw on a wealth of contacts to find new premises.

- Restructuring the wider staffing: the General Manager post has also led to restructuring of staffing within the organisation more broadly, which is reported to have significantly increased organisational capacity, particularly relating to facilities management and PR/communications.

The main challenge experienced has been finding affordable and suitable premises with long-term tenancies. Vault's model is based on providing 'meanwhile' (temporary) uses for empty buildings rather than having the organisation purchase building(s) or pay commercial rent²⁰. Therefore, none of Vault's locations are permanent; there is an ongoing need to identify new premises. Alongside this Vault has a waiting list of c. 160 artists seeking studio space, and so has a need for additional space.

As set out above, Vault is currently located across two sites: Marlborough House in Belfast city centre and Shankill Road Mission in north west Belfast. Shankill Road Mission is a long-term location (with seven years remaining on the lease), but Vault must vacate Marlborough House by late Summer/early Autumn 2025. Therefore, a new building must be found for at least 70 artists. Information on progress towards securing other locations is set out below.

Interviewees report that this challenge is not unique to Vault; it is a sector wide challenge in Northern Ireland with many other studios also competing for space. The challenges are partially commercially driven, but policy relating to meanwhile uses and community asset transfer also plays a role²¹. Therefore, Vault (along with other sector representatives) have recently been lobbying Stormont to amend such policies.

Other delivery challenges include:

- The complexity of the General Manager's role: the responsibilities of the General Manager are wide-ranging, so there are many demands on their time. A core part of their role is relationship management, and at times managing the tenants during a period of change has been challenging.
- Capacity remains a barrier: linked to the above, the complexity of the General Manager's role means that capacity is constrained. This means that some opportunities – for example, exploring other sources of income such as donations and corporate sponsorship – cannot be explored at present, whilst others – such as applying to The National Lottery Heritage Fund for repairs to the Shankill Road Mission – have been delayed. Further,

²⁰ Meanwhile uses occupy vacant or underutilised premises, sites or spaces on a temporary basis. Meanwhile uses are an opportunity to reactivate spaces while a landlord secures a new lease, before the major redevelopment of a site or in a long term vacant space.

²¹ Community asset transfer is a process where a public body, like a local council, transfers ownership or management of land or buildings to a community organisation for less than the market value.

whilst staffing capacity has increased, Board members are still involved in operational delivery at times; ideally the Board would have a strategic role only, but that would require the recruitment of additional staff.

- **Increase in costs:** it is likely that studio and room hire rental costs will have to increase in Summer 2025 in order to cover a 15% increase in costs, owing primarily to inflation and the rise in employer National Insurance contributions. Balancing rising costs with providing affordable studio space is an ongoing challenge.

The grant funding does not end until October 2026. However, at this stage, there is uncertainty over the feasibility of maintaining the General Manager post-grant. It is anticipated to largely depend on the outcome of a pending funding application (see below).

Outcomes and impacts

The grant has enabled Vault to professionalise across all aspects of organisational delivery and to grow. Specifically, the capacity of the General Manager has supported the organisation to:

- **Increase staffing:** a wider formalisation of the staffing structure has been led by the General Manager in order to support the growth and professionalisation of the Vault. This includes recruitment of a Facilities Officer (22-hours a week), a PR team (40 hours per month), and directly employing a cleaner (9-hours a week).
- **Improve staff knowledge/skills/confidence:** for example, the individual with responsibility for Vault's accounts completed bookkeeping training, to great effect.
- **Implement new and/or improved structures, processes and policies which are considered fit for purpose:** appointing a General Manager has provided the "bandwidth" to develop and formalise Vault's policies and procedures such as its grievance policy.
 - They have also introduced a formal membership agreement and induction process for new artists, and improved communication mechanisms by adding a dedicated 'members area' on the website.
 - Having a General Manager has provided a dedicated point of contact for members which did not exist previously (instead members had to contact the Board).
 - More broadly, the organisation has refined its core values and its Business Plan in collaboration with its members. As part of the process, data were collected from members on equality, diversity and inclusion, and general feedback on the studio space.
- **Increase its income:** interviewees report that turnover last year was £250k. There is a reported increase in unrestricted funding – from additional income from room hire and

studio space – and an increase in grant funding (e.g. from Belfast City Council and Arts Council NI), supported by contributions by the General Manager.

“There has been a step change in funding ... turnover has increased because income from the studios has increased and we’ve also brought in more external funding.”

Case study interviewee

More broadly, **the additional staffing capacity has enabled Vault to progress towards identifying more potential buildings (with more secure tenancies) for the organisation’s use - which is a core aim of the Business Plan.** Searching for premises has been led by the General Manager with support from the Facilities Officer. As noted above, the lease on one of its buildings is ending shortly, so there is a pressing need to find alternative premises. At the time of writing, significant progress had been made to identifying alternative premises. A new large building in Belfast city centre had been secured as another meanwhile use location, with the lease expected to last until the end of the 2025 only. There are also another three buildings in the pipeline with a mix of short, medium and long-term tenancies. For two buildings, funding has been secured to support with renovations.

“Having the [General Manager] and a small team you can trust to keep things running has been transformative for the board and the studios.”

Case study interviewee

The overall aim of the Grant Programme is to improve capacity, resilience and sustainability amongst VCSE organisations. There has been progress against this aim in relation to Vault. The capacity of the organisation has increased through the recruitment of the General Manager and formalising other staff roles, and this additional capacity has allowed Vault to professionalise delivery which is expected to support resilience. In addition, the grant is considered the “start of the journey” in building Vault’s financial reserves by growing, which is expected to support sustainability.

Learning

As a result of the Dormant Assets NI funding, Vault has been able to deliver activities associated with effective practice²². These include:

- **Delivery of strategic planning.** Vault has undertaken a strategic review of its Business Plan, involving all members, in order to agree a shared set of core values to help shape activity moving forward. When undertaking strategic planning, feedback emphasised the importance of ‘thinking differently’ and ensuring that the organisation’s values and added value are clearly articulated.

²² As set out in Annex D.

- **Investment in staff recruitment and training.** The organisation has been able to invest in new staff, formalise other staffing positions, and offer staff training. Investing in capacity has enabled the organisation to deliver activity it otherwise would not have done (such as professionalisation of its policies and processes).
- **Relationship building and partnership working.** Collaboration is a core value of Vault. The additional capacity (both from recruiting new staff and freeing up the time of the Board) has supported relationship building and partnership working. For example, to support community engagement activities at Shankill Road Mission, Vault is collaborating with the Greater Shankill Partnership (a community-led regeneration agency). It has also entered a partnership with ArtEZ University in the Netherlands which will see students/artists visit the Vault to participate in community activities.

Belfast Tool Library

Delivery

At the time of the Dormant Assets NI grant application, BTL had no paid staff members. The organisation was solely reliant on the Board members and volunteers to run BTL. There was space available to deliver workshops/events, but there was no capacity to utilise the space effectively. Therefore, the core rationale for applying to Dormant Assets NI was to increase the capacity of the BTL, both in terms of staff and volunteers, and to generate more income through the delivery of workshops and increased membership. The overall aim by the end of the grant period was to have 1,000 members (compared to c300 members pre-grant), and £20k pa. in membership income. This would enable BTL to realise 75% unrestricted income, with the remaining 25% of income from small grants for project work.

Specifically, the funding from the Grant Programme has been used to recruit two part-time staff. Their responsibilities include the day-to-day delivery of the library and the workshop, including assisting members, maintaining tools, arranging workshop sessions and classes²³, and recruiting/training volunteers.

However, the implementation of grant funded activities has been affected by several key challenges:

- **Relocation of premises:** in 2023, BTL (and Vault) had to move premises, as their previous location was being redeveloped. The move was not unforeseen as it was a meanwhile use space. However, the relocation process took nearly a year and demanded significant time and resource (the move itself cost £3k). It also led to the loss of income, with the library closed for a month, the workshop closed for several months, and a pause in recruiting members (and some members left due to the relocation).

²³ Note, workshop sessions are free to member (although there is a donation option) and classes are paid for.

- Crucially, the move was the priority over this period, which delayed the implementation of grant related activities.
- Increase in costs: interviewees noted that rising costs have been detrimental to the BTL's financial sustainability. The aim was to achieve 75% unrestricted income by the end of the grant period. However, while income generated has significantly grown, it is expected that this percentage will not be achieved by July 2025 owing to higher costs overall.
- Other challenges faced relate to staff and Board turnover. One staff member left the organisation (so the individual had to be replaced), and a number of founding members left the Board having completed a five year tenure, so only two remaining members have been involved in the organisation since the outset.

Outcomes and impacts

The recruitment of two part-time staff has been “*transformational for the organisation*”, providing the capacity to survive and grow as an organisation. Specifically, the capacity of the staff has supported:

- **An increase in unrestricted income:** its membership has doubled from c.300 to c.700 members. This is reported to be bringing in c. £18k in membership income (unrestricted income), compared to c. £8k in the financial year before the grant. Since the staff have been recruited, BTL has been able to deliver six to eight classes a month, which is also generating unrestricted income (c. £10k between August 2024-April 2025). Prior to the grant, no classes were delivered due to a lack of capacity.
- **Improved quality and retention of volunteers:** the organisation currently has 37 regular volunteers. The capacity of the staff has been important in improving the skills and retention of volunteers. For example, the organisation now offers training for volunteers and there are more regular communications with volunteers.

More broadly, the **additional capacity has enabled BTL to respond to networking and collaboration opportunities, which is leading to new and/or improved relationships.** For example, BTL has strengthened its relationship with Edinburgh Tool Library (the first tool library in the UK) as Dormant Assets funded a visit to BTL from the lead representative of Edinburgh Tool Library. Also, BTL is now involved in an informal network of tool libraries around the UK and is a member of the Northern Ireland Resources Network²⁴. The team have also provided the capacity to respond to promotional opportunities, such as a visit from Cool FM and attendance at high profile events such as Belfast's Autum Fair and Love Your Home exhibition.

The overall aim of the Grant Programme is to improve capacity, resilience and sustainability amongst VCSE organisations. BTL is “*undoubtedly more sustainable and resilient*” because of

²⁴ <https://www.ni-rn.com/>

the grant funded posts and growth in membership numbers and income. However, owing to the challenges outlined above (particularly rising costs), progress towards greater sustainability and resilience is more limited to date than hoped. Further, with growth comes additional work, so the organisation is now exploring its post-Dormant Assets strategy, which may include creating a Development Officer post.

Learning

As a result of the Dormant Assets NI funding, BTL has been able to deliver activities associated with effective practice²⁵. These include the diversification of income streams; investment in volunteer training and relationship building and partnership working.

In addition, the team have shared learning with other groups (as originally intended in their grant application) which has supported two other tool libraries to set-up, in Derry and Antrim. They have also scheduled a webinar in June 2025 focused on setting up a tool library.

²⁵ As set out in Annex C of the final evaluation report.

Ballycastle Credit Union

Case study summary

- Ballycastle Credit Union used Dormant Assets NI funding to install a new Progress banking platform and introduce a suite of online services. These were designed to allow customers to fully access all of its Credit Union services virtually, including joining the Credit Union online, applying for loans, and completing transactions without having to come in to the physical setting.
- The implementation of the new online system was reported to have been a smooth process. The Credit Union had invested time in researching the most appropriate third party vendor to meet their needs and had sought advice and guidance from other local Credit Unions.
- This digitisation of services is credited with resulting in: the growth of the Credit Union's loan book by approximately 30%, an increase from 185 new members in 2021/22 to 576 new members in 2022/34 and 488 in 2023/24, and savings growth of 14.2% since the new online services have been implemented.
- Additionally, the generation of surplus as a result of the digitisation of services has enabled them to expand their service offer further, provide training to staff, pay dividends and rebates to members, and further expand their community outreach.
- In sum, these outcomes have resulted in the Credit Union having increased resilience and sustainability going forward.

Introduction

Ballycastle Credit Union recently celebrated its 60th year of operation, and currently employs eight members of staff at its premises in Ballycastle and Cushendall, County Antrim. They have a membership of 8,000 (approximately 7,000 adults and 1,000 juniors), and serve a large rural community across the North coast. Ballycastle Credit Union's Manager described the organisation prior to receiving Dormant Assets funding as *"a traditional Credit Union whose services were only provided in-person"*. The Credit Union currently holds approximately £16 million in assets and has just over £9 million in loans. Interviewees described the Credit Union as an integral part of the local community, not just in terms of meeting the financial needs of community members but through a range of different activities related to social outreach, social enterprise and other community activities.



Ballycastle Credit Union received a grant of £92,950 from Dormant Assets NI and used it to install a new Progress banking platform and introduce a suite of online services. These

allowed customers to fully access all Credit Union services virtually, including joining the Credit Union online, applying for loans, and completing transactions without having to come in to the physical setting.

This case study is based on interviews with four members of staff from Ballycastle Credit Union, conducted during an in-person visit to the premises in March 2025, and a review of relevant documentation including a progress report and documentation related to the implementation of the new system.

Delivery

The grant funding was used to implement a digital suite to ensure the Credit Union could offer its members full online facilities, including:

- Applying for loans and drawing down loans fully remotely
- Online signature services
- Joining the Credit Union as a member fully remotely
- Completing transactions online.

Stakeholders described the implementation of the new online system delivery as a “*smooth process*”, largely due to the selection of the third party platform. There are five main vendors of similar services on the island of Ireland, and staff at the Credit Union engaged in consultation with other Credit Unions in the region to determine which vendor would best suit their needs:

“We went around to other Credit Unions that had the other five [vendors] – we went in to the ones that had them and asked about what works well, what works less well.”

Case study interviewee

The vendor then worked closely with staff members at the Credit Union to implement the new system, including a full-day visit to the Credit Union to transfer to the new system, and the delivery of training to operational staff to ensure they were skilled in how the system worked in practice.

The new online system is reported to have been very well-received by Credit Union members, as one staff member described:

“Our members – most people hate change – but they did embrace the new system. [...] It’s been met with positivity. They love the new online services – they love being fit to check their balances on the app, and being able to transfer money without having to come in to talk to members of staff.”

Case study interviewee

Credit Union staff noted that while some (typically older) members still preferred to come into the premises and complete transactions in-person, by investing in both their online offer and also retaining their presence on the high street and in the community, they were widening their offer to all members of the community.

Outcomes and impacts

Ballycastle Credit Union report a number of outcomes as a result of the Dormant Assets NI grant funding. These are set out below.

Growth of the loan book

Following implementation of the new digital services, the Credit Union reports an increase in loans issued of approximately 30%. Credit Union staff also described growing the number of loans alongside the quality of these loans (such as improved payment terms and improved arrears management processes).

Additionally, interviewees noted their perception that the new online DocuSign facility had enabled the increase in loans, as it does not require members to come into the premises to apply for a loan; in 2022/23, 28.15% of all loans issued by the Credit Union were processed using DocuSign, and this increased to 35.5% in 2023/24.

Increase in membership

Since implementing the new system, the Credit Union has seen a sizeable increase in new members joining each year - from 185 new members in 2021/22 to 576 new members in 2022/23 and 488 in 2023/24. This is largely attributed to the ability of members to join using the online portal.

Additionally, existing members increasingly making use of the online services, with the number of members registered and actively using the online services increasing from 1,871 in 2022/23 to 2,438 in 2023/24 (accounting for 33.8% of all adult members).

Credit Union colleagues noted how they believe this capability is widening the appeal of the Credit Union, and enabling them to diversify the demographics of their membership – bringing in younger customers, who may prefer being able to access services online, but also being better able to serve customers located in more rural areas.

“It’s been nice to see over the number of years – we’ve been able to target a lot of different people from different working backgrounds. The Credit Union has really evolved – it’s a different organisation. [...] With the membership we have, quite a lot of members are in rural areas. There are a lot of vulnerable members with health issues, or older members. It’s enabled us to reach a

completely different membership area. For years, we'd also struggle to attract a younger audience. The funding and online services have had a massive impact on that."

Case study interviewee

Savings growth/surplus

Ballycastle Credit Union has experienced savings growth of 14.2% over the last two years, which was described as *"significantly above"* most other Credit Unions. This generation of surplus is reported to have enabled the Credit Union to pay dividends and rebates to members, but also to supply additional services and give back to their local community.

"Our generation of surplus has been phenomenal. We either give back to members or put back into additional services."

Case study interviewee

Other efficiencies

Interviewees described a number of other efficiencies as a result of the new system, including a drastic reduction of the number of manual transactions completed by staff members (due to the system automatically processing transactions), and also the ability of the system to monitor transactions daily and particular periods during each day, enabling management to effectively allocate staff resource.

Further development of staff

The additional staff capacity and resource freed up by the efficiencies described above, in addition to the surplus generated, has also enabled the Credit Union to further invest in the development of its staff.

"The generation of surplus as a result of the grant funded activities has allowed us to sign Board members up for CPD [continuous professional development] training. Most of them have got a huge amount from that in terms of governance and strategic planning. That's been invaluable – making sure the Board are focused on moving the Credit Union forward. Before this, we couldn't really afford that – but we really are generating those circumstances - getting the Board focused on strategic planning [...] I'd bring that back to CPD training. It has opened the eyes of senior management and directors to their role in terms of governance and what we need to be doing."

Case study interviewee

Credit Union staff also noted that this had led to more robust policies and procedures being implemented for the organisation:

“The policies we had in place before might not have been adequate – we have had to review and put more robust policies in place. We’ve now done that – and we’re sitting in an excellent position as far as risk and compliance is concerned.”

Case study interviewee

Organisational sustainability

Credit Union staff reported that the funded activities had had a significant impact on the overall sustainability of the organisation:

“It was a one-year programme [...] but it’ll be ongoing here for the next 20 years. It wasn’t a one off – it got us to the next level in terms of technology, and to provide the services our members have been looking for for a number of years.”

Case study interviewee

Additionally, the generation of surplus as a result of the digitisation of services has enabled the organisation to expand their service offer further, provide training to staff, pay dividends and rebates to members, and further expand their community outreach.

“The introduction of the online services and the new software has accelerated what this size of Credit Union needed. It was a size where if we weren’t able to implement these changes – we had an option of cruising at the size we are, which meant no growth, which is not good for an organisation – or amalgamating with another organisation to keep it viable.”

Case study interviewee

The Credit Union’s source of income is from loans and investments; however, investments is reported to be a less reliable source of income than loans. The growth of the loan book is credited with ensuring that the Credit Union has a more reliable source of income moving forward, as one staff member explained:

“Credit Unions always tried not to rely on investment income. The app makes it easier for people to access loans – and that means we can give out more loans and receive income from the interest on that loan rather than rely on investment income.”

Case study interviewee

In sum, these outcomes are credited with leading to the Credit Union having increased resilience and sustainability going forward.

“That pot of money [the grant funding] – it helped us to essentially continue to make improvements to services and to futureproof us. I was here during the worst time for the Credit Union – there was a lot of uncertainty, the loan book wasn’t growing, [the] membership weren’t coming in... It’s amazing, the transformative effect of the funding and that support, from a

business that looked like it was really struggling. Now we're looking to say 'where can we go from here?'"

Case study interviewee

Community outreach and social impact

As well seeing an increase in the number of new members joining the Credit Union, the digitisation of services was also reported to have freed up staff capacity. Whereas previously staff members had to manually process each transaction, the new system automatically processes these; this transactional efficiency has enabled staff time to be reallocated to other areas of the business and the delivery of additional member services. For example, the Credit Union now delivers a school outreach programme, in which staff members visit local primary schools and support children to set up their first accounts and build their financial literacy on a weekly basis.

The Credit Union also used the surplus generated through these recent changes to set up a Fund to support community organisations and not-for-profit organisations who can apply for small amounts of funding from the Credit Union. This again is administered using the freed up staff capacity generated through the digitisation of services. This was identified as an unexpected outcome of the grant funded activity.

"Because we're generating a bit of surplus now – it's about giving back to the community, supporting our local not-for-profit organisations, charities and social enterprises, so they can apply to us for small amounts of fundings if carrying out a project. This was not originally planned – but the online services were so successful and the Credit Union in general is generating more surplus– that's one of the things we've decided to do for our community."

Case study interviewee

The Credit Union is now seeking to measure this social impact – they have developed a Social Impact Assessment for any community organisations who have received funding or support from the Credit Union, to capture its impact. Colleagues also noted that they plan to put themselves forward for social impact awards in the future:

"It's all about measuring that impact. We've been supporting [organisations] for 60 years – but never had a way of measuring the impacts we're having. [...] It wasn't worthwhile assessing social impact before. But now we're in a position to give out upwards of £12,000 in a year to support some of our local organisations. Last year we supported 27 groups with different levels of funding."

Case study interviewee

The newly implemented system has also enabled the Credit Union to more effectively report on its impact. The Credit Union produces its yearly report to share with committees as part of

its AGM. It was reported that the new system can easily and effectively generate graphs and analytics to display the impact of the Credit Union, which previously would have required significant staff time and resource to develop.

Learning

Key learning from the project includes:

- The importance of choosing the correct third party provider when implementing new systems – and engaging in collaboration with other similar organisations to share learning to inform the selection decision.
- The importance of listening to the organisation’s membership and adapting one’s service offer to meet their needs.

“A lesson learned for us is listen to our members. They’ve been asking for a number of years ‘when will you have online services?’. We thought they were happy coming in to the office, but we learned, once we’ve implemented online services - the sheer volume using online services has exceeded expectation. We learned: don’t delay in pushing the organisation forward. We were a very stationary organisation before this – but this springboard has shown us we must listen to members and we need to keep pace with what’s happening out there in the community.”

Case study interviewee

Looking to the future, Credit Union colleagues noted that this funding has allowed them to embark on *“phase one of their transition”* – they will look to further improve their online offer and improve other organisational policies related to cybersecurity, drawing on customer surveys and needs identified among their membership. The funding has enabled them to establish a base from which to further improve this service offering.

Finally, case study interviewees reported that this funded activity has served as evidence of the important role Credit Unions serve as community organisations. They noted that they were the only Credit Union in NI to have received funding from Dormant Assets NI Phase One, and were proud that their experience has evidenced the positive social impact that these organisations have the potential to bring about.

“It’s important that other Credit Unions out there don’t label themselves as just a financial services organisation. They are a social enterprise and they have an obligation to support their communities. [...] I’d encourage other Credit Unions to apply for funding for opportunities like these. Now that we’ve broken the mould of Credit Unions having access to funding - there should be more access to it in the future for other Credit Unions to enhance their organisations in the same capacity we’ve done.”

Case study interviewee

Interviewees felt that this funding has enabled them to evidence that Credit Unions are not only organisations that deliver *“ethical financial services”* but also are an integral part of the communities they serve.

SQW

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