

# Dormant Assets NI learning sessions

## Summary of breakout group discussions

### Introduction

As part of the evaluation of the Dormant Assets NI Phase One Grant Programme, SQW delivered two Virtual Learning Sessions for programme grant holders in February 2025. These sessions were designed to share key learnings from the [second interim evaluation report](#) and encourage grant holders to share and learn from each other. Approximately 60 grant holders took part across the two sessions.

The sessions each followed the same format, and commenced with SQW delivering a presentation of the key findings of the second interim evaluation report. The findings shared included that:

- The approaches which have worked well for the grant funded organisations in building capacity, resilience and sustainability align with the evidence regarding effective practice (as identified in [the first interim evaluation report](#)). These factors centre on effective project planning processes, ensuring adequate skills and resource for project delivery, building relationships and collaborating, developing leadership and management capabilities, and building unrestricted income.
- The Grant Programme has continued to be successful in generating outcomes and impacts for VCSE organisations in receipt of grant funding. The evidence indicates that outcomes experienced are often mutually reinforcing.
- Many of the outcomes and impacts reported can be attributed to the grant funding. Grant holders either reported they would not have achieved the outcomes at all without the grant, or not to the same quality, pace and scale.

A [recording of the presentation delivered is available to watch](#).

The presentation was followed by facilitated small group breakout sessions, in which grant holders discussed the following questions:

- **Is your organisation more sustainable or resilient as a result of your project, and if so, how? Do you expect it to be in future?**

- **What aspects of your projects have worked well in supporting improvements in sustainability, capacity and resilience? Why?**

The remainder of this document provides a summary of the breakout group discussions, drawn from both learning sessions.

## Summary of breakout group discussions

### Are the funded organisations more sustainable or resilient as a result of the funded project, and if so, how? Do grant holders expect their organisation to be in future?

Grant holders that attended the learning sessions generally reported that their organisations were more sustainable or resilient as a result of their funded projects. They described a range of ways in which this had been brought about by the funding, including:

- Recruitment of **business development managers** or other related roles focusing on improving the sustainability of their organisation. Grant holders noted that this had helped their organisation to diversify their income streams and proactively build external relationships with other organisations and stakeholders.
  - Grant holders, particularly in smaller organisations, noted how recruitment to the new roles enabled other colleagues to focus on their day roles, whilst ensuring strategic thinking still took place. Similarly, the capacity and resource enabled by the funding to think more strategically was noted as something that enabled grant holders to “future proof” their organisations and look forward to develop strategic plans.
  - One grant holder noted how business development activities delivered as part of the funding had led to a “cultural shift” across their wider team which gave them *“more of a business perspective”*.
  - While in some cases organisations intended to retain these roles, other grant holders noted how employing the roles on a short-term basis left behind a legacy for the sustainability of the organisation, such as strategic plans, or by using their expertise to implement new internal processes (such as streamlining IT or HR systems) which would endure beyond the postholder’s tenure.
- **Investments in technology or improved systems**, with grant holders describing a range of activities that had helped them to become more resilient or sustainable, including:
  - Updated Customer Relationship Management (CRM) system (reported by multiple grant holders)
  - Development of a new donor system on their website
  - Development of new learning management systems and an online learning platform, replacing previous paper-based learning resources
  - Improved reporting and accounting systems

- **Organisational restructuring**, with some grant holders reporting that the capacity for strategic thinking afforded by the funding had enabled them to make changes to how their organisations operated.
  - One grant holder noted how the funding enabled them to identify skills or knowledge gaps across their organisation including at board level, and seek to address these, and also to ensure that board members were more aware of and bought into activities delivered elsewhere in the organisation such as fundraising.
- **Development of a retail offer**, such as merchandising, opening of shops, and other methods of generating unrestricted income. Stakeholders flagged that income diversification is particularly important for the sector currently given competitiveness and constraints on grant funding.

A (smaller) number of grant holders also discussed how the grant had enabled them to improve how they measure **social impact**.

- For example, one organisation reported having developed an internal Impact Working Group focused on how they collect, measure and report on their social impact. They did so by bringing in an external consultant to deliver a staff survey, but then focused their work on involving internal colleagues from across the organisation to develop their own internal indicators, to ensure buy-in from across the organisation. This grant holder described that the organisation is prioritising collecting data and statistics alongside qualitative insights: *“We’ve started to look not only at collecting our data and figures and stats - but the heart, the emotion, connection to the stories.”*
- Another organisation reported recruiting an impact officer, who worked with the organisation to develop a more targeted approach to impact measurement and a stronger evidence base. This impact officer also trained other colleagues in the organisation on impact measurement.

A small number of grant holders reported changes to volunteering in their organisations, including recruitment, coordination, and volunteer training.

- One organisation used the funding to bring in a volunteering coordinator, who produced a volunteer strategy which the grant holder described as a “legacy of the funding” which they are confident will enable them to effectively recruit and coordinate volunteers going forward.
- Another grant holder described how the funding allowed them to further invest in their volunteers, through training opportunities and also offering wellbeing support to prevent volunteer burnout, noting a previous overreliance on volunteers.

A smaller number of grant holders found it more difficult to definitively say whether their organisation is more sustainable and/or resilient as a result of their project. However, these grant holders noted that the funding has proven key in enabling them to be on a journey that they are confident *will lead* to transformational change. Grant holders noted that effects on sustainability and resilience will be specific to organisations, their work and size. For example, some larger organisations described difficulties in attributing transformation to Dormant Assets funding, given their multiple streams of funding.

A number of grant holders also noted that their organisational sustainability had fluctuated over the funding period; one grant holder organisation described the transformational change they'd seen as a result of the funding, with their unrestricted income increasing significantly in the first year of the funding, but that this had actually decreased in the following year due to external factors.

Grant holders described sustainability as a process to be maintained rather than an outcome to be achieved outright, and one that is influenced by external factors. However, they described how the Dormant Accounts NI Phase One grant funding had provided them with tools, resources and capacity to continue to focus on maintaining the transformational changes made.

### **What aspects of the projects have worked well in supporting improvements in sustainability, capacity and resilience? Why?**

Grant holders described a number of key aspects or enablers of their projects that had led to improvements in sustainability, capacity and resilience.

- The **use of technology** and (new or updated) systems, as described above, was identified as a key enabling factor for improved sustainability, capacity and resilience. A number of grant holders noted that introducing new technologies had promoted new ways of learning, promoted efficiency and helped them implement data-driven approaches.
  - However, it was also noted that while new or improved technologies can offer efficiencies and reduce time taken on tasks that had previously been completed manually, it is important to consider that they take time to set up and ensure that staff members are effectively trained in their usage.
  - Similarly, and specifically in relation to CRM systems, grant holders noted that selecting the correct CRM system and supplier is key; they must meet organisational needs, and there needs to be wider staff involvement in this process to inform decision making.
  - The use of technology also posed a challenge to sustainability and resilience, at least for some, initially. Grant holders noted that organisations should not underestimate the time and resource required to upskill staff to be able to effectively use new technologies, as well as garner their buy-in to changes to operational practices.
- A number of grant holders also reported **collaboration** and **partnership working** as key enabling factors in achieving sustainability and resilience. Examples cited included developing strategic partnerships with similar organisations across the sector, as well as with businesses in the private sector.
  - Grant holders noted how such collaboration could be mutually beneficial: *"We team up with small organisations and strengthen each other"*. One grant holder described networks formed between organisations as an unexpected outcome of the Dormant Assets NI grant programme.
  - Relatedly, grant holders identified having the capacity and resource **to build networks** and **invest in relationships** as a key enabler, with a number of grant holders specifying that this was particularly useful for organisations outside of the voluntary and community sector: *"It can take a long time to develop strong relationships with private businesses."*

- Grant holders noted that being able to **communicate more widely and generate more awareness** of their organisation and activities as part of the funding was an enabling factor in bringing about sustainability and resilience. A number of grant holders identified this as specifically related to increasing their online presence and offering.
  - One grant holder noted that the increased awareness and reach of their service had led to other organisations getting in touch and wanting to collaborate and refer clients to their service.

Grant holders also noted a number of **enabling factors related to the delivery of Dormant Assets NI by The National Lottery Community Fund**, including:

- The support from funding officers, with one grant holder describing the relationship as making them feel more like *“a collaborator rather than a fund recipient”*
- The length of time associated with the funding, allowing for a sufficient planning period
- The timing of the Dormant Assets NI grant programme as being a particularly crucial one for the sector
- The flexibility of the programme, with one grant holder noting that *“we could use the money to do what we thought would work best for us.”*

However, grant holders also pointed to a number of challenges or barriers to achieving sustainability, resilience and capacity for their organisations. These included:

- **Recruitment**, particularly for business development posts.
  - One grant holder reported that they had struggled to recruit to one such post, but after an unsuccessful first round, they were then supported by an external recruitment consultant for a second round who changed the role title and requirements, which enabled them to recruit successfully.
- **Retention**, with difficulties around retention of recruited posts leading to some gaps between predecessors and new members of staff, and a related lack of continuity.
- **External factors** beyond the control of organisations such as the cost-of-living crisis and the effects of the COVID-19 pandemic.

## Other

The only question posed by grant holders was whether there would be a second phase of the Dormant Assets NI grant programme, with some noting that there is still a defined need for the programme across the sector.