

One NorthEast Evaluation Summary Sheet

Title of Report	Interim Evaluation Report on CADE Project Activity of the North East VCS Equalities Coalition
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Weblink to Evaluation Report	Draft will not be published until agreed by Accountable Body for the project, Management Group and One NorthEast. It is anticipated it will then be available through VONNE, Vision Sense and www.ignite-ne.com
Evaluation Purpose and Scope	<p>This evaluation will transparently and accurately:</p> <ul style="list-style-type: none"> • Assess whether the activity is effective, competent and provides value in its performance to achieve the aims, outcomes and impact agreed. • Demonstrate how successful the partnerships and process has been in delivering promised outcomes and outputs. • Draw valid comparisons between this and other similar projects. • Illustrate any benefits, impact (positive or negative) and Strategic Added Value gained from the project so far, whether expected or unexpected. • Outline learning opportunities and recommendations for development and improvements in the future. • Share good practice, lessons learned and project significance (socially, economically and culturally) to benefit other projects in the North East and beyond. <p>The scope of this evaluation is to assess activity delivered through the CADE project, by the North East VCS Equalities Coalition, from March 2007 until and including March 2008. The evaluation will use methodology set out in the agreed Evaluation Framework developed for the project in 2007 by Vision Sense.</p>
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Geographical Coverage	Durham, Northumberland, Tyne and Wear, Tees Valley

Date Received:

Project No:

Evaluation Form

Project Name: CADE

Ref No:

Applicant:

Project Start Date: March 2007

Project Completion Date: 2009 (Formative Evaluation delivered March 2008)

Brief description of the project

The project aim is to contribute to Economic Inclusion of the Regional Economic Strategy (D2) and more specifically to promote equality and diversity (D2.3). This will be delivered by supporting representation from the six diversity strands and "developing their capacity to identify and address their needs and strengthen their influence in order to contribute to achieving sustainable, inclusive economic growth." (Regional Economic Strategy 2006).

The CADE project has founded a North East Voluntary and Community Sector (VCS) Equalities Coalition, whose objectives to achieve the stated aims above, are:

- Engaging with representatives of the key diversity groups. The groups work closely with people who are at risk of exclusion through discrimination and with the community groups that support them.
- Creating a strategic grouping that brings together the collective voice of various representative bodies on equality in the Voluntary and Community Sectors. This will help facilitate shared learning, develop better communication strategies,
- Sharing structures and activities, and provide a stronger focus for equality in the region.

The project will deliver activity by:

- 1) Developing representation skills and building the North East VCS Equalities Coalition
- 2) Creating collaborative projects and partnerships between the diversity 'strands'
- 3) Building partnerships with key regional agencies to result in a strong collective VCS voice on equalities.
- 4) Developing representation skills through training and support
- 5) Collaboration to create shared information, signposting and networking

Beneficiaries are intended to be the Voluntary and Community Sector (VCS) diversity organisations working for and with the six 'strands' but particularly older people, young people, BME people, disabled people, lesbian, gay, bisexual, trans gender people and people of different faith groups. The project aims to support organisations working with other excluded groups including refugees and asylum seekers, ex-offenders, carers and lone parents. Service providers and decision makers will also benefit from improved access to a valuable and coordinated VCS equalities sector, with a network of well-informed and skilled representatives to inform their policies, practices and decisions.

To what extent have aims and objectives been achieved?

In the view of the evaluators, the important initial aims and objectives of the CADE project have been partially met by the establishing and work of the Coalition, judging progress in line with social capital outcomes set out in the Evaluation Framework.

Some diversity 'strands' of the Coalition exceeding expectation and output requirements. Other parts of the project were troubled with contested views of Coalition models and action, with admitted operational and effectiveness problems and have some work to do, to meet the agreed outcomes by the 2009 deadlines from the Business Case.

Several lessons have been learned from the elongated development phase of the Coalition, which provides a potentially more sustainable base as a result. It is unclear at this stage what hard economic outputs can be evidenced by the Coalition, but in terms of social inclusion of existing groups, it has anecdotally worked to strengthen the voice and profile of equality in the Voluntary and Community Sector. Some capacity building has been evidenced in the Coalition's ability to encourage bonding of social capital., but again this has no direct macroeconomic outputs.

Have any outcomes been achieved to date that could be attributed to the project?

Stated Outcomes with Evidence of Having Been Met (March 2007-March 2008)

The North East VCS Equalities Coalition has been formed and is functioning, as a regional network, with a Management Group to oversee it. Development work has been undertaken to improve cohesion and effective working of the Coalition lead organisations.

Lead delivery VCS organisations or partnerships from each of six diversity 'strands' have been appointed to establish networks within their 'strands' and have agreed Phase Two action plans, including networking, capacity building and equality support in the sector. Capacity needs and diagnosis of gaps within for each strand have been identified in the Phase Two action plans and capacity building work has begun within strands, with networking events and consultations of VCS organisations.

The Coalition has an Accountable Body (VONNE) with strong support from a contracts manager.

Coalition representatives form part of the North East Equality and Diversity Board and viable 'Voice' Task Group. This allows strand representatives to feed their views to decision-makers as a strong collective voice.

Effective joint-working between BECON members and the Years Ahead Forum, as well as between the gender and faith strands, was successful, producing sustainable outcomes and quality feedback. This has helped to demonstrate the potential of future joint-working between other strands.

The Coalition has developed a communications strategy to enable the flow of information, knowledge and decision-making from regional to local level and vice versa.

Inclusion within groups and joint working between ideological or campaigning groups with contested histories e.g. women with different feminisms, lesbian women and gay men has been achieved in some strands. The role of carers, Deaf people and organisations for and of disabled people is being negotiated within the proposals for a North East Coalition of Disabled People.

Development and adoption of the evaluation framework and quality assurance standard for the Coalition has been achieved.

In representation terms, the Business Case set out targets for the Coalition to be broadly representative of the community it serves. The Coalition has met its Business Case targets for diverse representation of beneficiaries in several areas, from collation of available representation statistics gathered for the evaluation (self-definition sample of 143 individuals). It was anticipated at the outset that 65% of beneficiaries would be women; the Coalition met this target exactly across all its evaluated activity. In addition, according to the Business Case for the project, 15% of beneficiaries were to be disabled people. 11% of beneficiaries who completed representation forms self-defined as disabled or Deaf people, while 20% had a long-term impairment which may mean they are afforded protected under the Disability Discrimination Act (1995 and amended 2005). 45% of beneficiaries were 25-49 years old. 60% of beneficiaries were Christian, 8% Muslim, whilst 2% of the sample each had Hindu, Jewish, Buddhist and Sikh faiths. 80% of respondents gave their ethnicity as White British, with 4% Polish, 4% Pakistani, 3% White Asian, 2% Bangladeshi, 3% Indian, 2% Chinese and 1% White and Black British people. 70% of respondents defined themselves as heterosexual, whilst 15% were lesbian, 3% bi-sexual, 8% gay men and 5% of respondents preferred not to disclose. Obviously, representation was centred around specific diversity strand activity, as would be expected in bonding stage activity. Over the progression of the Coalition, it may be possible to map the widening of representative activity across strands, to demonstrate bridging capital.

Monitoring of outputs and outcomes, although different, were designed in partnership to avoid duplication and aid lightness of touch for providers.

An annual verification visit as part of the One NorthEast monitoring and evaluation ensures consistency and application of approach. However, there were discrepancies in the consistent use of tools between 'strands' of the Coalition.

In social capital terms, the above outcomes demonstrate the beginnings of co-operative bonding activity, though most bonding activity so far has been through existing networks, with some new connections made to groups in different parts of the region. This parallels baseline evaluator expectation that established, traditional VCS formal groups (such as faith, black and minority ethnic community and older people's organisations) were previously active in the community and have led in the delivery of the Coalition. Hierarchies in these established groups tend to be male, with social capital participation being female.

The Lesbian, Gay, Bi-Sexual and Trans gender Federation formation through the sexual orientation strand has effectively demonstrated how a gender-balanced, democratic network can be built (supported by the CADE project) with multiple identity organisations working together, whilst maintaining vibrant dialogue and celebrating diversity. It is the view of the evaluators that this strand is an example of a 'strand' without an existing network that has met its outcomes and required outputs.

This bonding is naturally the precursor to bridging activity¹ in the social capital model being advocated for the Coalition. It is evident that some diversity 'strands' have strengthened existing networks and bonded internally; this reduces evidence of new outcomes directly attributable to CADE. However, this bonding capital is still valid and five strands (LGBT, age, faith, Black and Minority Ethnic Communities and gender) have delivered some bridging activity.

Stated Outcomes with Evidence of Having Been Partially Met (March 2007-March 2008)

The Coalition is beginning to develop a framework to support excluded people to take on representative roles in strategic bodies in the NE Region and at sub-regional and local levels. Some strands have existing structures (race and age) which function effectively but cannot be entirely attributed to the CADE project, though they have provided useful models and learning to inspire and support other strands. Additionality has been provided by the CADE project through change of existing One NorthEast funding for these projects.

Some non-accredited information sharing and equality workshops have been delivered in race, LGBT, youth, older people and gender strands through the Coalition. Whilst valuable, the focus so far has not been on formally delivered equality and diversity knowledge and practice training to VCS under-represented organisations across the region.

Joint-working between less-developed strands has begun to be planned. A strong partnership focus around shared areas of concern and campaigning will help the success of this initiative.

¹ Begum, H. (2003) *Social Capital in action: adding up local connections*. Centre for Civil Society and NCVO: London.

The Disability Strand is now adopting the proven, campaigning model of a radical Coalition, but has been dogged with three changes of Lead body and contested opinions from the start of the Coalition work in this area. The launch of Idea Tree, which is an excellent model for competent user-led campaigning and delivery, came spontaneously from pilot work for the Coalition, has been successful as a start up and now seeks further funding to grow and sustain itself.

The LGBT groups are adopting a valid and robust proven regional approach of the national Federation network.

Scoping and pilot sessions for the "Equalities Advocates" core programme have been delivered, but this has not continued to be delivered as yet into Phase Two.

Stated outputs with Evidence of having been Partially Met

Outputs were agreed in the business case which have been subject to stringent monitoring by the Contracts Manager and VONNE. Demonstrating success against these gives a demonstration of effectiveness for the spend and targets of the project, which is separate from, but gives context to the qualitative outcomes above.

300 organisations / businesses were to be supported (one hundred per financial year for the duration of the project). The figures were based on approximately 50 agencies gaining this support from each of the six strands. These were revised downwards to 260 with funder agreement, to account for only three months of financial year remaining of financial year 06/07. 148 organisations / businesses were supported by the end of December 07.

100 people were to participate in training at regional level to become equality advocates. They were to be supported and engaging with regional, sub-regional and local bodies to facilitate opportunities to progress project aims(original target date June 2008).

Consultation process took place in Phase 1 to identify the need for the Equalities Advocates Programme and its model of development. 47 individuals and organisations expressed an interest in joining the programme and participated in the consultation process over a series of small focus groups. Information was also presented to a wider network at the CADE Action Planning 4 Phase2 event. More development work has been done and it is envisaged that this core programme will be delivered in Phase Two of the project.

The Business Case for the CADE project stated that 900 people in the region would take part in skills development within each of the diversity networks, of six hours or more. Not all events have met formal criteria for skills development hours. However, 167 individuals received six hours or more skills development (end of December 07) (though a further 200 outputs are estimated by VONNE for the quarter to end of March 2008). Evidence is not available to the evaluators at present as to whether these are different individuals in each strand or whether there is bridging activity evidenced across events.

The target of the CADE project was for three jobs safeguarded and two created; two posts have been safeguarded and one created to the end of March 2008.

Targets remaining to be delivered from March 2008.

Influencing and monitoring regional policy and decision-making. Though the Coalition has a seat on the NE Equality and Diversity Board and leads on the 'voice' task group of the Board, delegates who have attended individual events have not yet had a consistent influence through representation, participation or involvement. This is one area where the Coalition is strategically important and work must happen in the next year if it is to have an influence on equality, inclusion, public life and strategy in the North East.

Training in representation skills and in key policy and practice issues throughout the life of the project was a key output indicator from the business case. There were a minimum of 20 events envisaged, targeting different audiences, with average attendance at 50, and approximately five training courses for 10 participants from each strand. These outputs will be delivered in Phase Two, as bridging and linking social capital must be evident before policy and practice work will be valid and sustainable (Original Target date January 2009).

Working in partnership with Equality North East in developing equality standards and audits for employer organisational good practice in the Region has not yet been formally started with the Coalition participants, though several members of strand leads have been working with Equality North East on the development of a standard.

The Coalition can play a central role in involving service users of each strand in consultation and involvement towards the Single Equality Scheme production of public bodies in the region, to ensure their voices are heard in relation to the diversity and human rights action plans of these bodies as well as in monitoring and reviewing performance of the Schemes. This timescale is approaching with most public bodies who are contemplating the Single Scheme route, preparing to deliver during the summer of 2008. The Coalition will need substantial work to ensure there is enough strategic participation expertise and qualification through each strand to ensure human rights and diversity advice and participation at the required level to input into Schemes.

Providing equality health checks for strategic bodies has not yet begun, though BECON are running a Health Check Toolkit service in association with Pentagon.

Further work and training towards a strong collective voice on equality and diversity in the North East (from excluded voluntary sector community voices, not only strand lead organisations) is required.

Initial targets from the Business Case that currently over-reach existing capacity through the CADE project in the timescale given.

Developing small research 'think tank' groups, which can be further developed and used to provide up to date analysis to feed in to the Coalition programme was an ambitious and valid goal at the outset of the CADE project. However, bridging and linking work must take priority, before there is the capacity and shared charter of the Coalition to justify further academic or policy development, research and publication.

Members of excluded communities were to be supported in negotiating accountability mechanisms with those they represent and the Project planned to act as an advocate in negotiating ways in which the culture and policy of the strategic bodies on which community members sit can become more inclusive and diverse. Again, this is a worthy aim, but training community representatives, supporting them to be involved in strategic decision-making in public life and developing the number and diversity of community representatives on these fora must be developed first. The core programme of the Coalition must demonstrate sustainability and effectiveness before the existing structure of strategic mechanisms can be effected.

Practical support to VCS organisation including increased skills in procurement practices, equality impact assessment and policy development are again areas in which the Coalition must develop, over the next year, before it can deliver cross-strand training and development for participants with quality and confidence. Initial, ambitious plans were to mainstream advice and engagement through the Coalition with Government Office for the North East on community strategy, community cohesion and equality- proofing its programmes, the Strategic Health Authority on inequalities and health, the Learning & Skills Council on the skills agenda, Job Centre Plus on diversity and worklessness and with Business Link on access to enterprise support. These are all still achievable, but there is unlikely pragmatically to be the capacity to deliver effectively as mainstreaming across these organisations from the Coalition in the next year.

The Coalition should therefore focus formally on becoming the consultation body of choice in each strand for public bodies, before individual members are trained and placed to give specialist implementation advice in equality. Without a successful reputation for consultation matched to a quality training and mentoring programme, led by qualified and experienced strand Leads, giving individual advice under the umbrella of the Coalition can risk the quality and integrity that the Coalition has worked hard to develop thus far.

To date, have there been any unanticipated outcomes, positive or negative?

Strand lead organisations were given an opportunity to explore this question directly, as part of the interim evaluation.

Their positive unanticipated outcomes were:

- Learning together while enjoying activities
- The way the work the Coalition funding has had a knock on effect with all the other projects within our network. This has been positive with regards to staff awareness of the Coalition, what they do, and how it may fit in with their own work.

Their negative unanticipated outcomes were:

- Difficulty engaging with other strands
- It has highlighted conflict of interest problems between strands in the region and helped us to resolve them
- Problems working with partner in another strand who worked more slowly
- Ability to attract further funding as a result of action plan

"I didn't anticipate the extent to which the CADE funding would set up tensions between diversity groups ... I expected there to be a stronger shared value base."

Coalition Management Group member

Whilst this was unanticipated from stakeholders, peer-reviewed research into effective Networks and Movements clearly demonstrates the contested nature of ideologies within these movements, despite a coherent external view of a network (or in this case, moves to set up a Coalition)². A participatory, democratic structure for the network could be agreed in all strands, to remove conflict around funding, hierarchy and control issues. This has already been agreed in the LGBT strand.

² Diani, M. and McAdam, D. (2003) *Social Movements and Networks: Relational Approaches to Collective Action* Oxford University Press: Oxford

Have any Strategic Added Value (SAV) outcomes been evidenced?

Original SAV outcomes from the Business Case for the project were identified as follows:

- Strategic and Catalytic Activity - The project intends in Phase Two to create awareness and interest for regional partners and stakeholders to contribute to the regional agenda on training, employment and worklessness. The project will also facilitate key partnerships of regional bodies, providing representation of all strand communities. Some public body stakeholders have attended Coalition events and activities to date.
- Increasing Co-ordination, Alignment and Partnership - The project has committed to inform the various strand communities on the activities of One NorthEast and the economic direction of the North East. In addition, it intends to directly inform One NorthEast of how its policies and activities impact on strand communities and lobby One NorthEast on the need to ensure its activities benefit marginalized communities using an evidence base.
- Improving Intelligence, Influencing and Awareness Raising - The project will improve the awareness of issues that face Women, Black people and people from minority ethnic communities, Lesbian, Gay, Bisexual and Trans gender people, disabled people, older and young people, people from faith communities and allow better engagement. The project will also inform and up-skill the strand communities.

Few outputs have been provided during monitoring and evaluation to evidence the above Strategic Added Value indicators, but it is envisaged that these are closely linked to bridging and linking social capital activity and may be able to be mapped in Phase Two.

How do you expect the outcomes of the project to be sustainable?

Whilst the rationale for the project remains valid, some conclusions were offered in the business case, about the potential economic effectiveness and inclusion impact of the Coalition, which are not yet warranted from existing evidence, evaluation and research.

Several beneficial impacts from comparable projects are found in the medium to long term. CADE ambitiously attempted to deliver similar outcomes with no existing infrastructure or organic agreed areas of collectivity around which to campaign from grass roots, in two years; admirable, but not simple or necessarily achievable within the given resources.

Using the Social Capital Model, several core elements of bonding capital have successfully been achieved by the Coalition:

- Empowerment
 - Beneficiaries have values, confidence and skills (met)
 - Beneficiaries participate in organisations which are representative
 - and inclusive (partially met)
- Connectedness
 - Beneficiaries are well-connected – trusting, sharing and working towards stated goals (partially met)

Further dimensions in this model need to be built in the Coalition and elements still need to be achieved, though some strands have begun to participate in these processes. The bridging dimension appears best achieved by joint, shared campaigning and wider, active participation in democratic Coalition activity³, beyond members attending events run by lead bodies.

The Bridging dimension of the Coalition model should be achievable by December 2008, demonstrating the following outcomes:

- Engagement
 - Intended beneficiaries engage with other communities (relationships and networks) (partially met)
- Accessibility
 - Intended beneficiaries have shared values and participate in processes that make their community accessible
- Innovation
 - Intended beneficiaries are open to new ideas facilitating their community to adapt to change

³ Fukuyama, Francis (2001). *Social capital, civil society and development*. Third World Quarterly, 22(1), 7-20

The final phase of Coalition development (which, if it takes the form of other evaluated networks will be in waves and not linear) is the linking dimension, with the following features:

- Linking
 - Resources – Intended beneficiaries have access to people and institutions with power and resources (representation and democratic voice)
- Influence
 - Intended beneficiaries have representation on public forums at which their interests are articulated (representation in public life).
 - Intended beneficiaries recognize the interdependence between their needs and the needs of others (trust and sustainable longevity built between 'strands' which may enhance social inclusion and reduce risk in the long term).

The project may prove sustainable, given time, further resources, a strong exit strategy, the implementation of quality assurance, transparent outcomes attached to each event or activity and a stronger evidence / research base linked to the development of the Coalition. This will form the framework for partnerships of organisations to fund to deliver work for the Coalition as part of their mainstream activity.

It is envisaged that as the Coalition gains a coherent external image, trust builds between diversity 'strands' and external organisations, the bridging and linking dimensions of the project will be fulfilled.⁴

⁴ Boeck, Thilo, Fleming, Jennie & Kemshall, Hazel (2006). *The Context of Risk Decisions: Does Social Capital Make a Difference?* Forum: Qualitative Social Research Vol, 7(1).

Have stakeholder perceptions around the project impact been captured? What were the results of this?

This interim evaluation is both qualitative and quantitative. It was conducted using a range of agreed, suitable and transparent objective and participative methods to engage stakeholders including:

- Primary and secondary sources
- Standardised evaluations from Coalition event delegates
- Diversity representation monitoring
- Surveys of stakeholders
- Interviews with key stakeholders
- Participative Observations
- Reflection logs (self appraisal), monitoring forms and notes of meetings and updates from VCS strand leads delivering activity
- Analysis of evidence from providers
- Group participation

The CADE project is complex, not least because its activities in different strands blur the lines between community development from a range of models and systems, including identity-based models, volunteering, networks, empowerment and community organizing for power and radical action and moves frequently between consultation and involvement.

Elements from appropriate methodologies have therefore been chosen as the proven basis for the chosen evaluation techniques, models and tools:

- Participatory Evaluation
- Learning, Evaluation and Planning (LEAP)
- Social Capital Model
- RAWM 360 degree feedback method

More information on this approach is available in the previous Evaluation framework report from CADE Phase One.

Each of the Coalition components (Strands, Management Group and Core Programme) was evaluated using a representative system and transparent methodology.

Not all events held have been evaluated, but the sample illustrated here is broadly representative of activity, feedback, observations and evidence provided.

Percentage figures given are for respondents to that question from collated forms.

Faith strand

Regional Faiths Network Event	16 April 2007
Regional Faiths Network Event	04 July 2007
Celebrating Women Together	

Strengths

Most attendees in events for this strand of the Coalition rated these areas as 'excellent':

Sharing information (72%)

Meeting new people (63%)

"Good regional participation, an excellent launch for the resource – well done."

“Challenging ideas of women in Islam” was the main thing that one beneficiary gained from the Understanding Faiths event.

Challenges

More time for round-table discussions needed (15%)

Several delegates commented that food was not multi-cultural, properly labelled as vegetarian or suitable for people at a faith event. In addition, two delegates said that multi-faith events that included lunch should take place outside of Ramadan, to respect their Sawm (daytime fasting).

Lesbian, Gay, Bi-Sexual & Trans gender strand

Lbi Organisation Network meeting 05 March 2007

A Journey Through the Closet 23 February 2008

Over the Rainbow 15 March 2008

“I’m feeling a real sense of community developing and being able to involve our young people in changes and rights for the LGBT community at the outset.”

Strengths

Most attendees in events for this strand of the Coalition rated these areas as ‘excellent’:

Sharing information (81%)

Working with others (73%)

Gaining confidence (24%)

I felt welcome and included (68%)

Venue and food (65%)

Challenges

Decision-making processes were not seen to be clear from the ‘strand’ into the wider Coalition. A chance to improve campaigning skills and work on joint campaigns with other strands was suggested by delegates at events and will be taken forward by the strand.

Black and Minority Ethnic Communities strand

Network Meeting 07 June 2007

BECON Older Age Voluntary & Community Sector Joint working meeting 20 March 2007

Years Ahead Information Session 15 May 2007

Housing issues for Gypsies & Travellers – 80 people attended

Strengths

Most attendees in events for this strand of the Coalition rated these areas as ‘excellent’:

Venue and food (77%)

I felt welcome and included (58%)

Information and resources (57%)

Meeting new people (61%)

Sharing information (53%)

Challenges

Earlier events were quite segregated, with people sticking to their own groups, but this may change over time.

Speakers ensuring they include other groups from minority ethnic communities.
Some groups of Chinese people not well-represented at the event.

Gender strand

Women, Culture & Religion event held – Umme attended as a speaker

Gender Equality 09 March 2007

DISC Away Day 19 June 2007

Strengths

Linking in to Regeneration Training and drawing on the male and female participants as an on-going resource

Engaging in national “Why Women” Campaign

Most attendees at these events for this strand of the Coalition rated these areas as ‘excellent’:

- Gaining confidence
- Working with others

Challenges

Leadership from experts in sector.

Contested feminisms in different groups and varying perceptions of gender equality between women in the network and their allies.

Age strand (Children and young people, plus older people)

Regional Forum for Voluntary Youth Organisations

01 March 2007, 05 July 2007, 13 September 2007, 08 November 2007,

NE Detached Youth Workers Forum 18 March 2007

Strengths

“These events helped us progress equality and inclusion and helps my organisation serve our community better.”

Engaging people who had not been engaged before.

Useful links with other organisations.

Challenges

Implications of CADE for Years Ahead Forum – capacity and management structure to deliver task focused work

Evaluation and monitoring of CADE – volume of forms, length of time it takes to complete and the sensitivity around trans gender issues with older people’s groups.

Disability Strand

This strand has met with several problems and has had three changes of Lead organisation for the pilot, first and second phases of CADE activity (Disability North, Skills for People and Gateshead Access Panel respectively) has meant the loss of some organizational memory and momentum. Gateshead Access Panel applied to deliver phase two, with support and input from Idea Tree and Adapt (Hexham). The North East Coalition of Disabled People has been scoped through several events and Gateshead Access Panel will provide capacity and administrative support for this radical, democratic, campaigning Coalition.

Negotiation around the role of carers and organisations for disabled people in the Coalition continue, but much progress has been made to date.

Management Group development events

Coalition Providers Meeting (MET) 6 March 2007

Strengths

Most attendees for events in this area of Coalition work rated these areas as 'excellent':

Sharing information (93%)

Support (57%)

Chance to influence other people (36%)

"Fun exercise and quiz helped me think about team-work in new ways."

Facilitator stuck to the task, was clear and efficient.

Room for improvement

More clarity on the role of Coalition and CADE project

Time to work with other strands

Developing a clear structure

Discussion about issues and Coalition politics kept breaking out and wasn't appropriate for this event.

Other Core Activity

An Elephant in the Room 03 April 2007

Equalities Workshop (Fourth Action) 29 March 2007

Equalities Advocate Programme 18 April 2007

Equalities Advocate Programme 21 May 2007

Equality Advocates 15 May 2007

Equalities Advocate Programme 02 July 2007

CADE4ACTION Phase 2 Conference (MET)
14 June 2007

Core Programme Meeting 3 December 2007

Strand Lead Organisations Perceptions

The following elements have been identified by Lead organisations in each strand as the most important outcomes from the Coalition work so far (for relevant strands):

- Building capacity in the voluntary and community sectors (Children and young people)
- Work to progress equality and inclusion (Children & young people and Faith)
- Helped my organisation serve our community better (Black and Minority Ethnic Communities strand)
- Learning about other strands (Older people)
- Building trust and relationships with people from other groups (Older people)
- Developing a collective voice with others (Gender and Faith)
- Led by people from the voluntary and community sector (Gender)
- Contributing to planning in the region (Gender, Black and Minority Ethnic Communities and Faith)
- Including people who had not engaged with us before (Faith)

“We have set up an atmosphere of trust with each other. There is a genuine feeling of wanting to make a difference in the region, and of working together in order to achieve that. Now it is a case of putting that into practice with commitment to joined up working, doing events together, supporting each others events, communicating effectively with each other, and being consistent with our message.”

Coalition Strand Lead Organiser

How has the project process worked? Could the project have been more effective if it had been delivered differently? How effective have any partnerships been?

“Coalitions are entered into on the simple premise that there is strength in unity and numbers, and that diverse groups with a common interest can work together to create synergy and greater impact, than if they work alone.”

Many issues (according to work from the successful Ireland Coalition⁵) are central to the success (or failure) of any Coalition:

- The agreed goals and aims of the Coalition
- The numbers and types of members and a wide representation of marginalized groups
- Its terms of membership and participation in the Coalition
- Modalities of decision-making
- Support provided to all Coalition members and individual efforts of single groups.
- An all embracing promotion of equality is formulated and to support

It is simple to say from this that with hindsight that pragmatically, a skills audit, research mapping and democratic governance arrangements agreed at the outset, would have promoted the success of the Coalition longer term.

Requirements for the infrastructure to be in place for a successful Coalition, may have built a democratic management group at the centre of a network, from which joint working could grow in a more sustainable way, without the conflict around funding and control that emerged in the first stages. A few stakeholders have offered hypotheses that this conflict was due to, “Lack of a shared value base,” between Coalition partners; in fact, the conflict results from an obvious lack of organizational development at the outset. Good development work, facilitated strongly by Louise Evan-Wong, has built in this development in later stages, but much time could have been saved had this been ‘designed-in’ from the outset.

Several of the lead bodies are unused to output monitoring, measuring outcomes and working in a hierarchical Coalition, which arguably does not deliver the notion of equality in its structure. These tensions are common in the VCS sector and not unpredictable, but strong development work is now in place and can overcome the initial problems.

⁵ Mulholland, M. (2004) *Making a Coalition work in Ireland*

The CADE project has successfully survived conflict (over funding, control and direction), contested internal views and operational challenges that are to be expected in this type of network development in the VCS equality sector.

However, several stakeholders, their organisations and funders, have worked hard and demonstrated commitment, with the support of an Accountable Body with integrity, to ensure that a workable Coalition is now emerging. The project was a brave risk; it did not grow organically from a resistance or campaigning base (unlike the successful Northern Ireland Equalities Coalition), nor was it constructed from a strong research method.

One success of the Northern Ireland Equalities Coalition is its spontaneous growth from a community spirit of reconciliation. It has been led from the grass-roots, but with support, advice, a long-term strategy and resourcing from international Law figures, academics and industry leads with strong political identities from the diverse communities it serves. It has not enjoyed the central start-up funding of the North East VCS Equalities Coalition and groups with diverse identities have come together around group civil liberties and political rights and changing the structure of discriminatory conditions that cause inequality. Their structure is one of participatory democracy and their recommendations⁶ for other Coalitions are:

- A central point of contact who holds the whole Coalition together and provides information to all networks (the North East VCS Equalities Coalition proposed Development worker role may serve this purpose)
- Be respectful of contested views and group autonomy
- Collate relevant research
- Respond to attacks on equality and lobbying decision-makers, don't attack each other
- Don't dilute lobbying effort with neo-liberal market agendas; critical solidarity is important for an oppositional, community approach to be successful
- Avoid jargon and acronyms that put people off!

Research assessments of social networks and equality movements in the last hundred years demonstrate common factors and process stages for effectiveness⁷. These are commonly:

- Coherent external image of a movement or group
- Contested internal identity and cultural, ideological or resource power struggles between diverse groups
- Collectivist, informal, democratic organisation, rather than formal hierarchical leadership
- Re-elaboration of elements of identity in different contexts over time
- Sharing of skills, competencies, motivations and resources

Several partnerships have been exemplary in demonstrating these elements; the work of the LBi organisation with gay men's groups to bring together a viable Federation, with the support of disabled people's organisation leads from Idea Tree is a particular example.

⁶ ICCL (2004) *Equality Coalition: From Action to Change*. Belfast.

⁷ Della Porta, D. Diani, M. (2006) *Social Movements* (2nd Ed) Blackwell Publishing Malden, MA.

Other work between Years Ahead and BECON was a more formal approach, but careful negotiation, through a culture of learning and mutual respect allowed joint-work to be successful. Exploring women's faith through gender and faith networks was also interesting in its potential for future work and in bringing new people to the network.

Data is variable as to how much bonding activity was within and between groups with existing links and shared ways of working and how much each 'strand' has been able to draw in extremely oppressed people and under-resourced groups who have historically been excluded from the mainstream. Particularly, evidence of meaningful partnership working with ex-offenders, carers and lone parents for example, outside of the usual 'strand' significance has been limited. For the integrity of the project, this true partnership approach and support for equality of these groups must be demonstrated in the next eighteen months.

Based on your experience, can you make any recommendations for consideration by future projects (includes the project process experience)?

A valid qualitative and quantitative user-led, peer-reviewed research base, governance arrangements and project management expertise at planning stages would be a worthy investment to protect a radical investment of this type, particularly given the existing capacity and track record of some VCS sector partners to deliver effective equality. Simulation models have been worked effectively in community development contexts and this is a valid way to demonstrate the potential efficacy of diverse approaches.

A focus on joint-working to champion the central premise (in this case, equality) and improve cohesion around shared priorities and organizational development, may help partners work collaboratively together.

Recommendations for the future of the CADE project, drawn from evidence, evaluation and consideration of development with regard to the policy, rational models and research framework in the field, are as follows:

Distinctions must be formalized between consultation, involvement and representation, to ensure the integrity of voice and community views and a consistent quality across projects with many dimensions and activities, at many different levels.

A joint, user-led Charter or Manifesto which makes the Coalition position on equality and diversity priorities explicit for its communities would assist cohesion, image and membership⁸

Raising its profile: a community (not worker) led newsletter and information sharing to inform participants of events and development in the equalities VCS, with signposting and promotional activities sector is required urgently. This should

⁸ Bowles, S. and Gintis, H. (2002) *Social Capital And Community Governance*. The Economic Journal 112 (483) , F419–F436

take electronic and paper form and be available in a range community venues, languages and formats, as the most excluded people are unlikely to have ICT access or existing contacts into support networks. In addition, agreed policy protocol mechanisms will allow appropriate Coalition reactions to be shared swiftly in the wider region.

Capacity is needed to assist delivery Leads and share information. One model advocated within the Coalition is the creation of a development worker post, to support development and add efficiency.

Voluntary activity towards advocating for equality, tackling inequality and promoting social justice is not yet evidenced in all strands of the Coalition, although in the LGBT strand and gender strands, working demonstrates it effectively. The disability strand also shows potential in Phase Two to build a strong, user-led voice to lobby for equality and citizenship of disabled people, using a capacity approach.

The hierarchical, traditional system of procurement and monitoring outputs, necessary due to the substantial public investment, has been criticized within the Coalition as skewing the community action element in which the culture of organic growth and volunteering is central. More capacity is needed to embed quality with relevant mechanisms and move to participative methods of evaluation in phase two.

The LGBT strand, has concentrated on 'grass-roots' involvement outside of working hours in cultural venues, which has been successful in minimizing 'worker' attendance and creating spontaneous 'movement' participative action grouping. These safe spaces have allowed innovation and bonding, to develop collective voice and identity. This has been managed without the usual community risk to the project, due to effective organisation, strong facilitation and work to diligently strengthen and promote effective support networks. This is a model which could be developed in other 'strands' and structural activity, where there may be some way to go to meet with the necessary Coalition culture of grass-roots, user-led participative democracy, which embodies equality in its methods.

An exit strategy is built into the Business Case for delivery by June 2008, which is essential to ensure the sustainability of the Coalition and reduce the risk to the current funders.

Skills, qualifications and competencies of project delivery organisations assessed and mapped against requirements to deliver project successfully. Appropriate training, capacity, systems and support can then be put in place at the outset to ensure risk is minimized for funders and transparency is optimized. This will lead to more quickly to in built trust and connectiveness, for success in community and network development.

What were the major lessons learned from the project?

The hierarchical nature of the 'strand' approach has been unhelpful in trying to build an equal Coalition. The CADE project bravely attempts to grow organic collective action from a professional structure, neo-liberal rationale, with time-bound and cost effective outputs which were valuable and valid, but arguably ill-suited to the activity.

Several early lead organisations in the Coalition have chosen not to pursue roles in subsequent stages of Coalition development. Scoping of capacity, central development support and investment required at the outset to allow organisations to deliver effectively, may have helped see less attrition.

This project has, however, successfully created the space and resources for social capital to flourish in the voluntary and community sector in the North East. This has led to vibrant and revitalized user-led, grass roots participation of people in some strands, with the retained domination of mainstream, powerful organisations in others. The North East VCS Equality Coalition, in the longer term, may a viable identity outside of the CADE project and its member organisations will be in a position to fund, through developing a role in tackling inequality where they find it, campaigning on joint issues and working to protect civic rights. An effective and pragmatic agreed exit strategy, for joint-working activities and vibrant partnership campaigning by a range of groups with the support of a powerful Coalition, will help secure the future for equality in the voluntary and community sector. If the Coalition fails to consolidate it's early advantage from the CADE project, much damage can be done to the integrity of the sector and the notions of equality and collective action.

Project management, governance arrangements and a strong user-led research base at the outset will save time and resources and improve the efficacy of future community projects.

How will messages from the evaluation be shared?

A short evaluation summary to share with beneficiaries, attendees, Lead and partner organisations in the Coalition, for transparency and to aid democratic decisions about the future direction of diversity 'strands,' their action plans and activities.

As a One NorthEast funded report, this evaluation will be intended for publication on www.ignite-ne.com and through major Regional Agencies, in particular with the North East Equality & Diversity Board. This will give adequate opportunity for relevant parties to obtain information and to share learning for future project development. The report will be published after the draft is agreed, changes made and adoption by the Management Group, deliverers and funders.