STEP AHEAD TRUST IMPACT PLAN 2026-2028



At Step Ahead Trust, we believe that every person has inherent worth, strengths, aspirations, and the right to live a meaningful life within their community. Our purpose is to enhance the wellbeing of people living with mental health challenges by creating opportunities for connection, growth, participation, and recovery. At Step Ahead, we consider recovery as **living well** in the **presence** or **absence** of mental distress. Rather than focusing solely on symptom elimination, this approach emphasizes personal empowerment, self-determination, and active community participation.

This Impact Plan reflects our commitment to understanding, measuring, and strengthening the difference we make in the lives of our members, whānau, staff, and communities. It provides a framework for ensuring that our services remain responsive, effective, and aligned with our mission, while helping us tell our story to members, funders, partners, and stakeholders.

Our approach is grounded in the values that guide all aspects of our work:

HOPE – We believe in people's capacity to grow, recover, and thrive.	**CHOICE –** We support people to make informed decisions and pursue goals that are meaningful to them.	**RESPONSIBILITY –** We are accountable for delivering high-quality services and stewarding our resources wisely.	**RESPECT –** We value diversity, dignity, culture, identity, and the lived experiences of every person.	**OPENNESS –** We foster honest communication, learning, and collaboration.

We recognise that wellbeing is multi-dimensional and interconnected. Drawing on holistic models of wellbeing, recovery-oriented practice, and an ongoing commitment to strengthening our understanding and integration of Te Ao Māori perspectives, we understand that people flourish when their needs for connection, identity, purpose, participation, support, safety, and self-expression are met together rather than in isolation.

This Impact Plan therefore focuses not only on what we do, but on the outcomes we seek to create. It guides our decision-making, supports continuous improvement, and ensures that the voices and

experiences of those we serve remain at the centre of our work. It also reflects our commitment to Te Tiriti o Waitangi and our aspiration to continually strengthen culturally responsive and inclusive practice across the organisation.

Through this framework, Step Ahead Trust seeks to build a stronger understanding of our impact, strengthen accountability, celebrate success, and continue creating opportunities for people and communities to thrive.

Impact measurement is not simply about accountability. It is about learning, improving, and ensuring that the experiences, strengths, and aspirations of our members continue to shape the future of Step Ahead Trust.

THE DIFFERENCE WE WANT TO MAKE

We want people to:

STAND TALL

People develop confidence, self-belief, and a strong sense of identity. They feel free to be themselves and express who they are.

FEEL SUPPORTED

People feel accepted, understood, and supported by others when they need it most.

FIND PURPOSE

People discover opportunities to contribute, learn, work, volunteer, and pursue goals that matter to them.

BE WELL

People experience improved mental, emotional, and physical wellbeing and feel better equipped to manage life's challenges.

CONNECT POSITIVELY

People build meaningful relationships, experience belonging, and contribute to supportive communities.

ENGAGE FULLY

People access joyful, welcoming, and stimulating environments that encourage participation, creativity, nature, recreation, and learning.

Together, these outcomes contribute to stronger individuals, healthier communities, and greater resilience.

HOW WE CREATE IMPACT

OUR IMPACT BEGINS WITH PEOPLE.

We provide a wide range of programmes, activities, and support designed to meet diverse needs and interests. These include wellbeing programmes, creative and recreational activities, social connection opportunities, education and life-skills development, and individual support.

We work alongside people to identify goals, build confidence, and take steps toward greater independence and wellbeing.

We also reduce barriers to participation by creating inclusive environments and ensuring our services are welcoming, accessible, and responsive to the communities we serve.

Our work is strengthened through partnerships with health providers, community organisations, cultural groups, employers, training providers, funders, and local communities.

WHAT SUCCESS LOOKS LIKE

When people are supported to participate, connect, and grow, we see:

- Improved wellbeing and recovery
- Increased confidence and self-determination
- Stronger social connections and support networks
- Greater participation in community life
- Increased engagement in education, employment, and volunteering
- Reduced reliance on crisis and acute services
- Stronger, more inclusive communities



HOPE CHOICE RESPECT RESPONSIBILITY OPENNESS

MEASURING OUR IMPACT

We are committed to understanding the difference our work makes and continuously improving our services.

We measure impact through a combination of data, feedback, and lived experience stories.

This includes understanding:

- Changes in wellbeing and recovery
- Feelings of connection and belonging
- Experiences of support and inclusion
- Growth in confidence, identity, and purpose
- Participation in employment, education, and volunteering
- Member satisfaction and service quality

Alongside these measures, we collect stories and feedback from members, whānau, staff, and partners that help us understand the human impact behind the numbers.

BUILDING A STRONG FUTURE

To continue creating meaningful impact, we are focused on:

DEEPENING IMPACT

Improving the quality of support we provide, strengthening individual outcomes, and enhancing culturally responsive practice.

GROWING IMPACT

Expanding opportunities for participation, developing partnerships, and exploring innovative ways to support wellbeing.

STRENGTHENING OUR ORGANISATION

Investing in our people, systems, and sustainability so that Step Ahead remains resilient and responsive into the future.

STRENGTHENING MEASUREMENT AND LEARNING

Using evidence, data, and storytelling to better understand our impact and guide continuous improvement.

STEP AHEAD TRUST IMPACT PLAN 2026-2028

OUR COMMITMENT

Everything we do is grounded in our values of Hope, Choice, Openness, Respect, and Responsibility.

We are committed to walking alongside people on their wellbeing journey, creating opportunities for connection and growth, and building communities where everyone has the chance to flourish.

Together, we are creating pathways to wellbeing, belonging, and purpose.

IMPACT PLAN FRAMEWORK

1. Impact Intent (Our North Star)

Step Ahead Trust exists to enable:

- Mental and physical wellbeing
- Strong identity and self-expression
- Meaningful connection and belonging
- Experiences of acceptance, and support
- Purpose and the opportunity to contribute
- Access to joyful, vibrant, and engaging environments

This reflects a **holistic wellbeing model**, grounded in human needs (drawing on Manfred Max-Neef), where multiple needs are met **simultaneously (synergistically)** rather than in isolation.

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2. Impact

If Step Ahead…

- Delivers diverse, inclusive, and engaging programmes
- Builds strong relationships and safe environments
- Supports individual goal-setting and personal development
- Partners with health, community, and cultural organisations
- Reduces barriers to access and participation

Then members will…

- Improve their wellbeing
- Feel connected and supported

- Develop identity and confidence
- Engage in meaningful activity

Leading to…

- Sustained recovery and resilience
- Stronger communities
- Reduced reliance on crisis services

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3. Outcomes Framework

Primary Outcomes (People-Level Impact)

- **Soulful, Mind balanced, Happy**
    - People experience physical health and wellbeing
- **Standing Tall**
    - People have a sense of identity and are free to be themselves
- **Positive Connection**
    - People feel and are positively connected to others, helping each other
- **Support**
    - People are accepted and supported
- **Purpose**
    - People have purpose and the opportunity to contribute
- **Engagement**
    - People are accessing joyful spaces of vibrance, nature, and interactivity

Organisational Outcomes

- **Fit for Purpose**
    - Services are responsive, high-quality, and member-led
- **Resilient & Thriving Organisation**
    - Financially sustainable, adaptive, and future-focused

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4. Key Activities (What We Do)

Our Service Delivery includes:

- Wellbeing, creative, social, recreational, educational, and life skills programmes
- Peer support and group connection activities
- Cultural and identity-affirming initiatives
- Education and skill-building workshops

We Provide:

Individual Support

- Individualised plans and goal setting
- Regular check-ins
- Pathways to employment, education, and volunteering

We Promote:

Access & Inclusion

- Transport support and barrier reduction
- Inclusive, culturally responsive practice
- Te Tiriti-informed approaches

We Foster:

Partnerships

- Funders/Ministries
- Health and Mental Health providers
- Community and cultural organisations
- Employers and training providers

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5. Impact Measurement Framework

Quantitative Indicators

Wellbeing

- % reporting improved wellbeing
- % improved mental health self-management
- Participation rates
- Reduction in crisis service use

Connection

- % reporting belonging

- Peer champions identified and trained
- Participation rates in Intentional Peer Support activities
- Group participation rates

Purpose

- Engagement in employment / education / volunteering
- Retention rates
- Reported sense of purpose

Identity & Safety

- % feeling safe to express identity
- Participation rates in Te Tiriti informed activities

Experience of Support

- Satisfaction with services
- Trust in staff relationships

Organisational Health

- Staff retention and wellbeing
- Financial sustainability
- Achievement of short-term and long-term strategic goals
- Achievement of key indicators

Qualitative Measures

- Case studies
- Member stories
- Whānau feedback
- Staff insights

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6. Strategic Enablers (What Makes It Work)

- Strong organisational commitment and leadership
- Skilled and motivated workforce
- Established funding base
- Deep community connections

- Diverse programme offering
- Partnership ecosystem
- Governance
- Member participation

Key gap identified:

- Need to strengthen **indigenous knowledge and Te Ao Māori integration**

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7. Risks & Constraints

External Risks

- Increasing demand and complexity
- Funding uncertainty (e.g., Ministry of Social Development, Te Whatu Ora)
- Economic pressures
- Climate and natural events

Internal Risks

- Capacity constraints
- Data and measurement gaps
- Infrastructure limitations
- Maintaining workforce wellbeing

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8. Strategic Priorities (Next Phase)

A. Deepen Impact (Quality)

- Strengthen individual planning and outcomes tracking
- Improve culturally responsive practice
- Further embed IPS and co-design with members

B. Grow Impact (Scale)

- Expand reach and participation
- Increase partnerships
- Explore new service models

C. Strengthen Organisation

- Workforce development

- Financial sustainability and diversification
- Systems, policies, and performance monitoring

D. Improve Impact Measurement

- Formalise indicators and reporting
- Strengthen data systems
- Strengthen storytelling

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9. Stakeholder Engagement

Key Stakeholders

- Members and whānau
- Staff and volunteers
- Government funders
- Community partners
- Mental health sector organisations

Communication Approach

- Data + storytelling ("what's our truth / what's our story")
- Tailored reporting for:
    - Board
    - Funders
    - Community

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10. What This Gives Us (In Practice)

This impact plan will enable us to:

- Align **strategy, operations, and funding conversations**
- Clearly articulate our **value proposition**
- Strengthen **position for funding opportunities and reporting**
- Guide **Board decision-making**

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KEY INDICATORS

Outcome	Key Indicator	Action	Evidence	Responsible	Frequency
People have mental & physical wellbeing (soul-full, mind-balanced, happy)	% reporting improved wellbeing	Deliver wellbeing, physical, creative, and mindfulness activities	Annual Update outcomes, wellbeing surveys; attendance; possible research projects?	Staff	Quarterly
People have mental & physical wellbeing (soul-full, mind-balanced, happy)	% reporting improved ability to manage mental health	Provide **M**ember **I**ndividualised **P**lans and 6-monthly check-ins	**MIPs**	Staff	Ongoing
People have mental & physical wellbeing (soul-full, mind-balanced, happy)	Participation rates in wellbeing activities	Partner with external health providers for workshops	Attendance records; partnership/collaborator agreements	Staff	Quarterly
People feel and are positively connected to others and helping each other	% reporting increased sense of belonging	Facilitate group and social activities	Attendance records; annual updates, annual organisation evaluations	Staff	Quarterly
People feel and are positively connected to others and helping each other	% reporting trusted peer connections	Implement, support, and grow **I**ntentional **P**eer **S**upport	IPS attendance; feedback forms	Practice Manager	Ongoing
People feel and are positively connected to others and helping each other	Participation in peer-led activities	Support members to co-design activities; support members to engage in **IPS**	Activity attendance; MSLM attendance	Staff	Ongoing
People have purpose & the opportunity to contribute	% engaged in employment/volunteering/education	Support members to identify personal goals	**MIPs**	EGL/Senior Staff	Ongoing

People have purpose & the opportunity to contribute	Number of members supported into work/volunteering	Provide work readiness support & CV/interview support	Placement (CRM) records; follow-up reports	EGL	Quarterly
People have purpose & the opportunity to contribute	% reporting increased sense of purpose	Offer support to identify employment and secure opportunities	Member feedback; placement feedback	EGL	Quarterly
Organisation is Fit for Purpose	Achievement of service delivery targets	Regular service review & planning	Resources for funding and audit reports	CEO/Operations Manager	Quarterly
Organisation is Fit for Purpose	Member satisfaction	Collect structured member feedback	Annual organisation evaluation survey; feedback from member/staff liaison meetings	Staff	Biannually
Organisation is Fit for Purpose	Staff engagement & retention	Provide professional development opportunities & supervision	Annual Performance Self-reviews	CEO	Annually
People have a sense of identity & are free to be themselves	% reporting feeling safe expressing identity	Deliver culturally responsive programs	Member/staff liaison meetings; programme records; annual & 6-monthly updates	Staff	Quarterly
People have a sense of identity & are free to be themselves	% reporting increased confidence	Support creative and cultural expression	Attendance records; qualitative feedback	Staff	Ongoing
People are Te Tiriti informed	% participation in Te Tiriti-informed activities	Support cultural enrichment	Attendance, qualitative feedback	Staff	Ongoing

People are accepted and supported	% reporting feeling respected & valued	Maintain person-centred, strengths-based support	Member/staff liaison meetings; programme records; annual & 6-monthly updates	Staff	Quarterly
People are accepted and supported	Engagement & retention	Offer peer support and group support spaces	Attendance records; IPS programme review; qualitative feedback	Practice Manager	Ongoing
People are accessing joyful spaces full of vibrancy, nature, and interactivity	Participation rates in activities	Deliver recreational, creative, and nature-based activities	Attendance records; member/staff liaison meetings; programme records; annual & 6-monthly updates	Activity Coordinators	Quarterly
People are accessing joyful spaces full of vibrancy, nature, and interactivity	% reporting increased enjoyment & inspiration	Develop partnerships with community & environmental providers	Partnership agreements; attendance records	CEO/EGL Coordinator	Biannually
Organisation is Resilient & Thriving	Financial sustainability indicators	Develop and implement sustainable funding strategies	Financial reports; audits	CEO/Finance Administrator	Annually
Organisation is Resilient & Thriving	Growth/stability in service participation	Monitor impact plan implementation	Dashboards; reports	CEO/Senior Leadership	Quarterly
Organisation is Resilient & Thriving	Staff wellbeing & workforce stability	Maintain staff team building and wellbeing programmes	Annual Performance Self-reviews; wellbeing surveys	CEO/WPS Manager	Biannually

Organisation is Resilient & Thriving	Evidence of innovation & responsiveness	Support service innovation & continuous improvement	Organisational evaluation surveys	CEO/Senior Leadership	Ongoing
"The Board provides effective stewardship, oversight, and strategic leadership to ensure Step Ahead remains resilient and sustainable."					
Organisation is Resilient & Thriving	Storytelling and networking	Increase opportunities to promote Step Ahead's impact and strengthen community relationships	Presentations delivered, networking events attended, partnerships established or maintained, media coverage	Board/CEO	Quarterly
Organisation is Resilient & Thriving	Organisational resilience	Review strategic, financial, operational and succession risks and implement mitigation strategies	Board risk register reviewed and updated; Impace Plan monitoring; annual business continuity review	Board	Quarterly
Organisation is Resilient & Thriving	An engaged and informed Board	Participate in governance training and professional development opportunities	Professional development records; conference attendance; governance training certificates	Board	Annually
Organisation is Resilient & Thriving	Board participation	Maintain active attendance and contribution at Board meetings, committees and strategic planning activities	Board attendance records; meeting minutes; annual Board evaluation	Board	Quarterly