

# Pathways to Economic Opportunities Programme (P2E)

## Phase 2

Fund guidelines 2022/23



**The London  
Community  
Foundation**

# Fund guidelines

## Phase 2

### 1. About the Pathways to Economic Opportunities Programme (P2E)

We are delighted to announce Phase 2 of the Pathways to Economic Opportunities Programme (P2E). This programme has been established by The London Community Foundation (LCF), with support from JPMorgan Chase (JPMC), to invest in Black and Minoritised community led 'by and for' organisations providing specialist Employment, Enterprise and Financial Health (EEFH) services. P2E will be delivered in partnership with Action for Race Equality (ARE) (previously the Black Training and Enterprise Group) and The Ubele Initiative (Ubele). You can find out more about the P2E programme and Phase 1 funding and co-design by clicking on the link to the website [here](#).

Definition: Led 'by and for' where:

- 'For' = Over 75% of participants of the project or organisation/those receiving support are from Black, Asian or Minority Ethnic backgrounds.
- 'Led by' = 75% or more of the governing body (Board/Directors/Management Committee) AND 50% of senior staff are from Black, Asian or Minority Ethnic backgrounds.

### Key features of the Programme

- **Phase 1** supported six organisations that deliver services led 'by and for' Black and Minoritised communities in London and whose focus is to support small business owners and/or economically disadvantaged adults to develop skills, access jobs, or improve their financial health and resilience. The funding for this phase also supported grantees to work with ARE to co-design the longer-term funding and support (Phase 2), which will be launched in early 2022.
- **Phase 2** is a two-year grant programme, (2.5 years overall with the preparation and roundup of activities) and includes funding to organisations alongside comprehensive organisational development activities, as well as an opportunity to engage with the wider sector delivering EEFH support, local government and policymakers, as well as participate in learning and evaluation, external communications, and events over the duration of the programme.

## The overall strategic objective of P2E

The overall objective of P2E is to contribute to building equity, inclusion and resilience (within the charitable sector) and improve economic outcomes for Black and Minoritised communities facing racial and economic inequities. This will be done through place-based investment targeting specific Black and Minoritised communities (boroughs) and by building a platform for sharing expertise, experience and best practice post COVID-19.

## The approach

We recognise and value the insights and experience of Black and Minoritised led sector leaders. From October to December 2021, Phase 1 grantees partnered with ARE to help co-design a programme of funding and organisational development support for a wider cohort of Black and Minoritised community led organisations operating in the EEFH support space.

The co-design sessions covered discussions on the application form, application process (e.g. accessibility, equity, language and terminology), criteria and eligibility, organisational development needs, monitoring (metrics) and evaluation.

Phase 1 also provided early insights into the changing market / evidence base for place-based support to promote economic outcomes for Black and Minoritised communities in London. Ubele Initiative conducted a pan-London mapping exercise and survey of Black and Minoritised voluntary and community led organisations, and/or those organisations supporting Black and Minoritised communities involved in providing training and/or advice on EEFH.

We would like to thank the six Phase 1 short term grantees, which contributed to the co-design and engagement sessions as well as those Black and Minoritised voluntary and community organisations involved in providing training and/or advice on employment and financial support for completing the pan-London mapping exercise survey. You can find out more about the co-design sessions on our [blog](#).

## 2. Collaboration and engagement with grantees

### Organisational development

Organisational development support is a collaborative and participatory approach and a key element in the P2E programme design. As a partnership, we recognise that organisational development is a vital component of support for Black and Minoritised sector organisations. The co-design participants in Phase 1 also strongly emphasised the importance of organisational empowerment.

This component of the programme aims to provide a package of support that best fits with the specific needs and the diverse learning styles of funded organisations as part of Phase 2.

There will be a range of organisational development methods and will likely include some or all of the following:

- One to one support: access to bespoke learning packages co-designed by you and your organisational development lead
- Specialist peer learning and networking events/ opportunities

- Invitation to workshops / training on for example wellbeing, influencing policy, fundraising strategies, business planning and digital confidence
- Invitation to conferences on EEFH development within the wider charitable sector.
- Specialist support: Access to a team of experts on specialised topics

Activities will specifically focus on areas of need identified in Phase 1 and data captured as part of the application and organisational development process for Phase 2.

The topics will likely include all or some of the following: governance and leadership, operations and organisational management, wellbeing, HR procedures, systems and infrastructure and programme design content and delivery.

This component of the programme will be managed in partnership with the Organisational Development Lead with support from LCF.

Successful grantees will be expected to complete an organisational development assessment survey at the beginning of the programme. ARE and Ubele will be in touch directly with successful grantees to discuss what this process will look like after awards have been made.

### Your commitment

Each successful applicant will be expected to commit to participate and engage in the organisational development activities over the 2 years as part of a package of support. LCF recognises that this requires a time commitment.

**Therefore, we recommend you allocate half a day per month and budget accordingly.**

Due to the COVID-19 pandemic and related social distancing measures, some sessions may take place virtually e.g. via Zoom. However, we recognise the value of face-to-face networking and engagement. We anticipate a hybrid delivery model of both virtual and face to face engagement across the period of the programme. This will depend on both government guidance as well as periodic feedback from successful applicants.

## 3. Eligibility

### Who can apply?

**Please ensure you have read these guidance notes, especially this section carefully to ensure your organisation is eligible for support.**

**Eligible legal structure**— there must be a signed governing document in place appropriate to the legal structure which includes an asset lock (or equivalent clause), and the purpose of all funded activities must be charitable (not for profit):

- Charitable Incorporated Organisation (CIO)
- Company Limited by Guarantee (CLG) - may also be registered as a Charity or a Community Interest Company Limited by Guarantee (CICLG)
- Registered Charities

- Community Benefit Societies (CBS). Ideally, the CBS will also be registered as charitable with HMRC, however this is not essential.

### Applicants must have:

- **Organisation:** At least 3 years in operation
- **Governance:** You must have at least three unrelated members legally responsible for the governance of the organisation; Trustees/Directors/Management Committee as appropriate to your structure. Please note that this refers to the highest level of governance, a Management Committee that sits below a Board of Trustees (e.g. charities, CIOs) or Directors (CLG or CICLG) does not count towards this.
- **Bank account:** A bank account in the same name as the organisation applying with a minimum of two unrelated signatories must be in place.
- **Safeguarding:** You must have a safeguarding policy in place that has been reviewed in the last two years.
- **Previous LCF funding:** All conditions from any previous LCF grants must be completed and there is no current outstanding monitoring at the time of application. If you know you have an outstanding monitoring report on a previous grant, please contact LCF to resolve this.
- **Registration:** If the income for charitable purposes is more than £5k at the point of application, organisations must have submitted an application to register to Charity Commission or the relevant regulator (e.g., Companies House, CIC regulator or Financial Conduct Authority). If the LCF grant will take the organisation over £5k, please visit [this website](#) for guidance on setting up a charity, including information on legal structures.

### What can't be funded?

- The following types of organisation are not eligible:
  - Companies limited by Shares (including CIC limited by shares).
  - Statutory organisations, such as local authorities.
  - NHS bodies.
  - Co-operative Societies.
- The grant funds cannot be used for:
  - activities that promote religious or political views,
  - purely commercial ventures (for profit),
  - spending that has already taken place (i.e. retrospective funding),
  - individual sponsorship or redistribution of a grant to individuals or other organisations, or
  - activities where people are excluded on the basis of religion, sexual orientation, sex or ethnicity (unless the issue is group-specific).
- There must be no [personal benefit](#) attached to the grant.
- The organisation must not have two years of late submissions to the Charity Commission/Companies House within the last two completed financial years.
- The organisation must not have two years of net current liabilities within the two most recent completed financial years.
- Organisations where Trustees are paid are not eligible unless evidence of approval is provided from the Charity Commission and/or this arrangement is referenced in the governing document.
- Organisations with fewer than three unrelated members responsible for the governance of the organisation; trustees / directors / management committee, as appropriate.

## 4. Phase 2: Fund criteria

We want to work with a portfolio of organisations where there is a mix of specialist EEFH support, demonstrating:

- Experience of providing services led **'by and for'** Black and Minoritised communities in London
- Experience of delivering **holistic and person-centred employment, enterprise and financial health** support that equips young adults and adults aged 18 - 65 years on low income and/or disproportionately affected Black and Minoritised communities with the support they need for a path to sustainable EEFH outcomes
- Experience of and interest in working with local communities and **collaborative** partnership working
- A passion for seeking organisational investment to drive increased services/accessibility/reach/caseload or continuity/inclusivity of engagement
- Delivery of interventions that also address wider **intersectional** inequalities including ethnicity, class, sex-based inequality, sexuality, religion, immigration status, disability and age which impact on experiences of access to support.

### Funding available

The Fund will provide two years of grant funding between £50,000 to £100,000 (£25,000 to £50,000) per year. We expect approx. 20 grants to be awarded from the £1.5m available funds.

### Funding themes

Funding is available for Black and Minoritised community led organisations that deliver projects/activities in London supporting individuals to build confidence, overcome barriers and realise their potential through at least one or more of the following themes:

- **Employability:** People seeking jobs or job progression. Support could include:
  - Skills development/training, access to jobs, re-upskilling, job-readiness, preparing for, moving into and / or sustaining employment
- **Enterprise:** Self-employed (sole traders) or owners of micro-businesses seeking to sustain or grow their business. Support could include:
  - Entrepreneurship and micro/small business skills training, access to workspace, mentoring and resources, facilitating access to finance
- **Financial Health:** People managing money on low incomes. Support could include:
  - Tailored and expert information, advice and guidance, income maximisation, household budgeting/savings and debt management, and financial coaching towards financial goals.

**Priority will be given to community organisations who demonstrate the following:**

- A track record of meeting the increased/diverse needs of service-users and delivering EEFH services led **'by and for'** Black and Minoritised communities.

- Are embedded and well connected within the community and delivering services that are already making a real impact in the borough with a good understanding of the needs of individuals in relation to EEFH support.
- Annual income between £50,000 to £650,000.
- Delivering holistic and person-centred support locally to adults (18+ years) on low income or disproportionality affected Black and minoritised communities in one or more theme areas of EEFH. If you are working with a mixed age group, any activity/core support you are applying for should demonstrably benefit young adults and adults aged 18 – 65 years only.
- Projects /activities are provided in one or more of the priority boroughs: Barking & Dagenham, Brent, Croydon, Hounslow, Newham, Tower Hamlets, and Waltham Forest.

Whilst activities will be prioritised in the above boroughs, consideration may be given to work with organisations that are not based in a priority borough by looking at need and opportunity. You can find out more about Phase 1's early insights into changing market/evidence base for place-based support by clicking on the link to the website [here](#).

### Annual income

Organisations with an annual income of between £50,000 to £650,000 will be prioritised. Organisations can apply for up to 50% of their annual income. If your income for the last financial year was £60,000 you can apply for a maximum of £30,000 per year, or £60,000 for the two years.

### What can we fund?

As part of the co-design sessions with Phase 1 grantees, there was a discussion on how the funding should be used. LCF recognises the benefits of being flexible and we are pleased to offer grants which can be used for project costs, core costs or a mix of both.

We want to fund in a way which contributes to the health and strength of organisations, and which supports your ability to be flexible and adaptable, recognising that projects/activities don't always go to plan.

Applicants should consider what their organisation's project costs, core costs and organisational development needs are in delivering EEFH support and include related costs in the budget. Applicants can apply for core costs, project costs or mix of both (full cost recovery – of direct costs of projects and the overheads) in running the project/activity. There is no upper limit of core vs project costs, but we will assess whether your proposal meets the priorities of the programme.

**Project costs:** Costs of delivering new, continued or expanded activities and support in one or more of the themes across the portfolio: employability, enterprise or financial health. This should include all costs directly related to the project, such as activity costs, project management, project staff, project related admin, insurance etc.

**Core costs:** The overhead costs of an organisation to make the organisation more resilient and sustainable, as opposed to those specific to project costs. Whilst these costs do not directly produce outputs of charitable activities and support in one or more of the themes across the portfolio: employability, enterprise or financial health, they are necessary to deliver these activities. Examples

include general management staff\*, staff development and training, rental costs, accreditation, digital and communication and governance.

**\*Please note:** We are a Living Wage Friendly Funder. This scheme, run by the Living Wage Foundation means that LCF will actively encourage and support applications from organisations willing to pay staff (existing, sessional, part-time, full-time or, freelance) the Real Living Wage, which as of November 2021, is £11.05 per hour in London. We are asking organisations to make their application for any staff costs at the Living Wage rates, so please budget for this in your project / activity staff costs. You can find out more about the Living Wage Scheme by clicking here: <https://www.livingwage.org.uk/living-wage-funders>

We understand that for some organisations paying a Living Wage can be difficult for a number of reasons, we would like to work with organisations to see how we can support you to enable you to pay a Living Wage.

### Budget breakdown

In the budget breakdown section of the application form, the headings (staff costs, volunteer costs, etc.) are examples of types of costs and the amount – you do not have to put a cost in each heading if it does not apply but there may be others that you need to include.

There are two cost boxes, one for the **total amount of the project/work** and one for **requested amounts you are applying to us**. The cost breakdown also allows you to enter the details for the specific cost. These details should only refer to the elements of the proposal that are covered by your grant from us. Please give us a full breakdown of the costs as shown in the example below.

The costs in this section refer to project costs or full cost recovery (a mix of core and project direct costs of projects and the overheads) in running the work/project over 2 years.

#### Staff costs

Requested amount	4,000
Total amount	4,000

#### Cost breakdown

Year 1: 2 employment coaches @ £12.50 per hour x 2 hours per session x 40 weekly sessions = £2,000, per year
Year 2: 2 employment coaches @ £12.50 per hour x 2 hours per session x 40 weekly sessions = £2,000, per year

#### Volunteer costs

Requested amount	1,200
Total amount	1,200

#### Cost breakdown

Year 1: Travel expenses for 2 volunteers at £7.50 per session each x 40 weekly sessions = £600 per year
Year2: Travel expenses for 2 volunteers at £7.50 per session each x 40 weekly sessions = £600 per year



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**Note for volunteer expenses** - Only out-of-pocket expenses can be paid to volunteers, who should submit receipts and/or proof of payment such as bus/rail tickets for your records. Volunteers should not be paid a flat rate as they will be classed as employees of your organisation.

**Operations/activity costs**

Requested amount	3,360
Total amount	3,360

**Cost breakdown**

Year 1: Zoom License) @ £20.00 per month x 12 months = £240. Audit costs £1,440 per year =£1,680  
 Year 2: Zoom License) @ £20.00 per month x 12 months = £240. Audit costs £1,440 per year =£1,680

**Office, overhead, premises costs Cost breakdown**

Requested amount	2,400
Total amount	2,400

Year 1: Room hire @ £15 per hour x 2 hours per session x 40 weekly sessions = £1,200 per year  
 Year 2: Room hire @ £15 per hour x 2 hours per session x 40 weekly sessions = £1,200 per year

**Capital**

Requested amount	600
Total amount	600

**Cost breakdown**

1 x laptop @ £600

**Publicity**

Requested amount	162
Total amount	162

**Cost breakdown**

Banners x 1 @ £108 = £108 Flyers x 200 @ £54 = £54

The costs in this section refer to core costs over 2 year.

**Core costs**

Requested amount	00,000
Total amount	00,000

**Cost breakdown**

Examples

- Rental costs @ £xx per month
- General management staff (staff costs) Role @ £xx
- Accreditation @ £xx
- Digital & Communications @

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- Governance development @ £xx
- Staff development and training @ £xx
- Monitoring and evaluation @ £xx

## Defining your outcomes/impact for the application

To best describe the impact your project/work will have on the people you support, we will be asking you to identify relevant indicators. Below is a list of example indicators on the employment, enterprise and financial health themes. You should choose a minimum of four indicators overall, and a minimum of two indicators per theme, as relevant to the work the grant will support (i.e. if you focus on all three themes, you will need at least two indicators per theme, or six overall). You may also include your own outcomes in the application form.

Please include your chosen outcomes and indicators to your application form under ‘**What would the benefits and outcomes be as a result of the funding?**’ Funded organisations will then be supported to develop more specific end user level outcomes, especially for organisational development with anticipated indicators and targets, at the start of the grant.

Outcome	Indicator	Target No
<b>Impact Themes</b>		
<b>Increase employability</b>	Choose a minimum of two (excludes the required field)	
<b>Required field</b>	<b>Total number of individuals supported</b>	
	Number of people who attended and completed employment training workshops as part of your work	
	Number of people who accessed new volunteer opportunities as a result of your work	
	Number of people who gained sustainable employment as a result of your work	
	Number of work placement/experience opportunities available as a result of your work	
	Number of people who gain qualifications as a result of your work	
	Number of people who enrolled in further education as a result of your work	
<b>Increase enterprise</b>	Choose a minimum of two (excludes the required field)	<b>Target No</b>
<b>Required field</b>	<b>Total number of individuals supported</b>	
	Number of people attending self-employment/business skills workshops	
	Number of people attending business set up workshops	
	Number of new businesses started as a result of your work	
	Number of people becoming self-employed as a result of your work	
	Number of businesses that increased revenue as a result of your work	

Improve financial health	Choose a minimum of two (excludes the required field)	Target No
Required field	Total number of individuals supported	
	Number of people accessing welfare and benefit advice	
	Number of staff/volunteers trained to provide advice	
	Number of people who reported a reduction in debt as a result of your work	
	Number of people through financial coaching/budgeting have increased their savings	
	Number of people who reported an increase in related benefits as a result of your work	
	Total amount of benefits generated (income maximisation) as a result of your work	
Increase organisational development	Choose a minimum of two (excludes the required field)	Target No
Required field	Total number of staff/trustees engaged on the leadership and management skills sessions	
	Number of staff/trustees/volunteers engaged on training/workshops provided	
	Number of staff involved in the learning networks	
	Number of 1-2-1 coaching/confidence building sessions attended	
	Number of staff/volunteers/trustees reporting increased knowledge and confidence	
	Number of staff/volunteers adopting best practices identified by the sessions	
	% increase in services/accessibility/reach/caseload	
	Amount of additional financial resources secured to sustain services beyond period of funding	

## Key dates

The fund opens for 5 weeks on **Thursday 3<sup>rd</sup> March 2022**. The **deadline** to complete and submit your application form and all supporting documents is **5pm Friday 8<sup>h</sup> April 2022**. The funding period for delivery of services is **1<sup>st</sup> June 2022 to 31<sup>st</sup> May 2024**.

## 5. How to Apply

**Please note this is an online application form.**

To apply for a grant, please visit the 'Pathways to Economic Opportunities Programme' page under the 'Available Grants' section of LCF's website [here](#).

Please read the instructions carefully, tick to say if you agree and have understood, enter your e-mail address, click on 'send e-mail' and continue.

Once you have done this, you will be sent an email with a link to your unique online application form. **Please check your junk mail box.**

The supporting documents you will need to provide are:

- Your signed Governing Document, i.e. your constitution or memorandum and articles
- Names of your: Trustees/Directors/Management Committee
- Annual Accounts or projected financial income for management accounts using the forward planning financial template Income & Expenditure (I&E)
- Safeguarding policy

If you have received funding from LCF within the last two years, you need only submit your most recent accounts (or income & expenditure information for smaller groups), unless any of your policies have been updated during this period.

If you are having problems with the form, please send an email to [applications@londoncf.org.uk](mailto:applications@londoncf.org.uk) for assistance.

## 6. Assessing and Decision Making

**What happens after the deadline?**

**Who will we select and who will be involved in the decisions?**

**Step 1:** LCF and ARE will shortlist applications which best fit Pathways to Economic Opportunities programme themes and meet the Fund eligibility and criteria. Shortlisted applicants may be contacted by a Grant Programmes Manager from The London Community Foundation for an informal chat to find out more about the project/activity and / or to request additional information.

**Step 2:** Assessed applications will be presented to the P2E Decision Making Panel for funding decisions in May 2022. A panel of sector experts from across London will make the final decisions on where to allocate the funding. Successful and unsuccessful applicants will be notified of the decision in writing in May 2022. The panel decision is final and cannot be appealed.

**What happens after the grant is awarded?**

Once a decision has been made to award a grant, an offer letter will be issued along with a completed copy of the grant agreement (please check your junk mail box). The receiving organisation will be required to sign and return the grant agreement as an indication of acceptance within **2 weeks** of receiving the offer letter. Successful applicants will have two years from Wednesday 1<sup>st</sup> June to Friday 31<sup>st</sup> May 2024 to spend the grant awarded. Grants cannot cover activities or expenditure taking place before any grant is awarded.

## 7. Monitoring, Reporting and Evaluation

Monitoring and evaluating projects/activities funded by our grants enables your organisation, and us, to better understand the impact of the grant. It helps us to understand community needs more fully, enables your organisation and us to learn from your projects/activities and may also help you put together information that can help to inform future plans.

For further information and tips on monitoring your work, there are several useful websites, such as

<https://knowhownonprofit.org/organisation/impact> and <http://www.evaluation.org.uk/>

Phase 1 grantees through the co-design sessions told us that there should be a combination of site visits to learning more about the grantees on the ground and monitoring reports for grantees, and they should not be required to report more than two times per year. Interim reports will be due ahead of the fund instalment payment in recognition that small organisations often need to actively manage cash flow.

## Reporting Period

Milestone	Date
Grant Start Date	1 <sup>st</sup> June 2022
Year 1 Interim Monitoring Report	14 <sup>th</sup> November 2022 (to enable next payment in December 2022)
Year 1 End of Year Monitoring Report	31 <sup>st</sup> May 2023 (to enable next payment in June 2023)
Year 2 Interim Monitoring Report	13 <sup>th</sup> November 2023 (to enable next payment in December 2023)
Grant End Date	31 <sup>st</sup> May 2024
Year 2 End of Grant Final Monitoring Report	28 <sup>th</sup> June 2024

## Evaluation and Learning

The partnership is committed to understanding and measuring the impact of the programme's strategy and approach, both on community providers and people using their services. We would like all successful grantee organisations to feed into ongoing development of the programme, and share learnings and insights from the impact of the support. This could include for example increased sustainability/improved ability to deliver services/ inclusivity of engagement.

Funded organisations will be supported to develop more specific organisational development outcomes, with anticipated indicators and targets.

The evaluation and learning component of the programme will be managed in partnership with Ubele with support from LCF.

### Engaging grantees in evaluation and learning

Successful grantees will be required to participate in sessions/ focus groups to feed into the final evaluation and learning framework. Ubele will be in touch directly with successful grantees to discuss what this process will look like after awards have been made.

### Engaging service users in evaluation

In the second year, Ubele would like to speak to a small number of your service users e.g. through a focus group, telephone or face to face interviews, as appropriate and of course, with each organisation's facilitation and individuals' full consent. This is part of the overall programme evaluation to understand how the programme has affected the organisation and service users of funded services.

## Need help?

Please do not hesitate to contact us if you would like to discuss your proposal prior to making an application, if you need assistance with completing the form or providing the supporting documents, or require an alternative format for this information:

The London Community Foundation: [applications@londoncf.org.uk](mailto:applications@londoncf.org.uk) 020 7582 5117

## Applicant support and FAQs

LCF will be running a Q&A online session about the P2E programme and the application process on Thursday 17<sup>th</sup> March 2022 from 2pm - 3.30pm. Please see our social media and newsletter for details.

We aim to provide easy access for all users to our website and to ensure that users can experience all content on the site, regardless of their browser and operating system. Please [visit our accessibility advice page](#) for details. The Grant Programmes Manager can also provide applicant support.

You can also find links and tools useful for exploring all aspects of setting up and running an organisation from The London Community Foundation website at: <http://londoncf.org.uk/apply/resources>

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