

# Pathways<sup>2</sup>Economic Opportunities

CO-DESIGN SESSIONS REPORT

PHASE 1



# Introduction

**Structural barriers in the UK have created large racial inequalities that have been worsened by the COVID-19 pandemic. They have placed a big strain on people and families' economic mobility.**

The £2 million Pathways to Economic Opportunities (P2E) fund, administered by The London Community Foundation (LCF), with support from JPMorgan Chase and in collaboration with partners, aims to help remove barriers to opportunity for Black and Minoritised communities in London by strengthening led 'by and for' organisations that focus on jobs and skills, small business growth and financial health support.

The fund aims to demonstrate the importance of community and infrastructure organisations in addressing inequalities, creating new opportunities post COVID-19 and helping to remove barriers to economic opportunity in London. Ultimately, it will provide a platform for sharing expertise, insights and learning.

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 report summarises the learning, reflections and recommendations from the experience led organisations participating in the co-design process. The insights are key to anyone developing and designing new programmes with a more inclusive approach to communities and community-based organisations.

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## ABOUT PATHWAYS2ECONOMIC OPPORTUNITIES

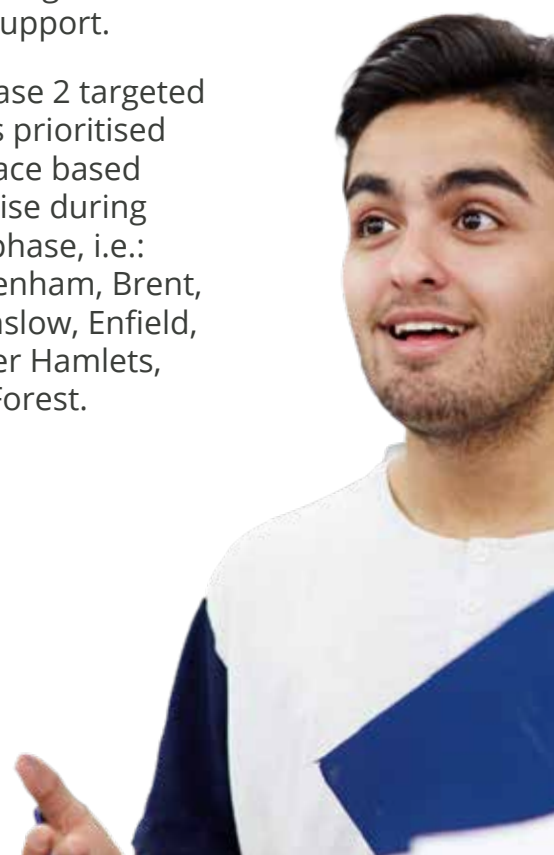
### Phase 1

During Phase 1 six organisations were awarded stabilisation and engagement support of £11,500 over six months to support the delivery of employment, enterprise and financial health services and projects; and to participate in the co-design delivered from October 2021 to December 2021 for the second programme of longer-term funding and support. The initial phase also included a mapping survey exercise to inform the design and place-based approach.

### Phase 2

Phase 2 launched in early 2022. This phase awards grants between £50,000 to £100,000 over two years to 19 registered charities, voluntary or community groups, to cover project costs and/or core costs, alongside participation and engagement in organisational development support.

Activities in Phase 2 targeted eight boroughs prioritised through the place based mapping exercise during the co-design phase, i.e.: Barking & Dagenham, Brent, Croydon, Hounslow, Enfield, Newham, Tower Hamlets, and Waltham Forest.



Organisational development support is a collaborative and participatory approach, core to the programme design. This phase of the programme provides a package of support that best fits the specific needs and diverse learning styles of the funded organisations.

## THE ROLE OF ACTION FOR RACE EQUALITY (ARE)

Action for Race Equality (ARE) (previously The Black Training and Enterprise Group (BTEG)) is a national race equality charity delivering programmes for Black, Asian and Minority Ethnic (BAME) young people aged 11-30 years to help them realise their full potential.

We work collaboratively across the public, private and civil society sector, conduct action research, operate as a strategic partner for funders and provide a voice to government for Black, Asian and Minority Ethnic (BAME) civil society organisations.

We are a dynamic networking organisation connecting with over 1,500 organisations in England. ARE is uniquely positioned to support voluntary sector, public sector and private sector organisations to assess, review and develop policies and practices that include equality, diversity and inclusion through training and consultancy.

ARE was commissioned by LCF as the P2E Programme Partner to help strategically design, deliver and manage the programme, which includes leading on the co-design of the prospectus, capacity building support, and supporting the monitoring, learning and evaluation.

ARE is pleased to be working with London Community Foundation and JPMorgan Chase (JPMC) to help address structural barriers and racial inequalities impacting Black and Minoritised communities in London.

These disparities and inequalities have been exacerbated by the pandemic and resulted in further disproportionate challenges and barriers to economic mobility.

As part of this initiative, ARE is a delivery partner providing specialist insight and context to co-design the next inclusive and sector specific funding programme.

# Phase1 | CO-DESIGN

ARE worked with LCF in phase 1 to identify and fund six organisations over six months that deliver services led 'by and for' Black and minoritised communities in London supporting economically under-served people to develop skills, access jobs, or improve their financial health and resilience.

These six supported organisations received a grant of £10,000 plus additional support of £1,500 to commit to working with ARE to co-design the future phase 2 funding and capacity building support programme, which launched in early 2022.

## The co-design partners and process

The process to select the six-partner organisation was part of phase one and coordinated jointly with LCF.

The selected six organisations were:

- Account3
- Bangladesh Youth Movement
- Communities Welfare Network
- Golden Opportunities Skills and Development
- Skills and Training Network
- Youth League UK

Each organisation was expected to commit to attending and participating in six three-hour co-design workshops, submit required written responses and undertake some field work.

The six scheduled sessions were facilitated with a mixture of open discussions, tasks and group work and were aligned around the following core topics:

1. The application process
2. Eligibility/Criteria
3. Language
4. Application form
5. Communication/relationships
6. Accessibility
7. Specialist insights from a Black and Minority Ethnic (BAME) perspective
8. Capacity Building sessions: Organisational Development models of support, Organisational Development support needs
9. Monitoring and evaluation



# Reflections, review and recommendations

## 1. THE APPLICATION PROCESS

1.1 The group were asked to reflect on their experience of applying to participate in Phase 1 – what worked, and did not work in terms of their experiences with other funders.

- There was positive feedback about the speed and short turnaround time of phase 1 funding. Although it was acknowledged that this was due to the funder's time frame, it was appreciated how quickly decisions were made and funding received.
- There were comments that funders that take longer than three months do not appreciate that small BAME organisations will struggle to manage longer turnaround times
- The Expression of Interest approach, which included a short five-question survey, was appreciated as this minimised time and the capacity of unsuccessful applicants.
- The guidelines were also clear and organisations appreciated that they were able to directly speak to the Project Lead at LCF.
- There was huge appreciation that JPMorgan Chase recognise the BAME funding deficit and are doing something practical to challenge the disparities in the funding world.
- They found the 'meet the funder' session very useful not just in terms of content. In diluting the approach to 'engage' with a funder in a process that was definitely a novelty, the group also felt 'honoured'. They strongly believed that their experiences and insights will give invaluable 'added value', and convey to the funder, a 'bigger picture' and more 'diverse lenses' when designing future programmes.
- The group were also keen to emphasise that the approach to consult and even co-design, was not to just speak to the usual suspects, or the 'big boys' in the charity sector. Glad to be heard.
- The previous word limit of 150 words for a few of the questions was a struggle. These should be up to 200 words.

1.2 Looking forward, a number of additional points to consider were presented.

- Suggested that it is a two-stage process – an application form with transparent scoring followed by shortlisted organisations of a maximum of 30 to be invited to interview based on approximately 20 organisations to be funded).
- An interview approach was recommended as this allows people with poor written skills and lack of bid writing skills to articulate their project and skills as well as show creativity and include any specialist colleagues or trustees in the conversation.

*See section 4 for more details.*

- To note that the eligibility questionnaire does not need to have a question about number of employees. The group saw no need for this, nor any relevance for this at this stage. This is a question for the application stage.
- An alternative option was proposed – as used for Phase 1 grantees, a three-stage process where the first stage is an online eligibility questionnaire followed by a link to the application form if organisations pass the eligibility check.
- To consider terminology. Although the group used the term ‘interview’ they would prefer an alternative term such as ‘stage 2 assessment’ or ‘informal interview’.
- Shortlisting and interviews should have independent panelists and joint briefing session that include a session on bias. It should be the same people throughout the process for consistency.
- Broad interview questions are sent in advance but also recognise that some specific probing questions will be also asked.
- The scoring system should be transparent and be in the guidelines.
- When promoting the programme, ensure the information is shared via existing BAME networks and do not assume that BAME organisations will be on the radar of generalist second tier organisations.
- This should be a 30 minute session (maximum 45 minutes) with organisations receiving clear instructions including the option

to have up to three people present allowing for experts to be in the room (this can be staff, users or trustees).

- There should be a few standard questions shared in advance with the option to ask any bespoke questions relevant to the organisation and their application. (suggestions below)
- A clear scoring sheet for each panellist should be developed.

## 2. ELIGIBILITY/CRITERIA

The group were pleased that an organisation such as ARE was collaborating with LCF and JPMorgan Chase and able to represent the issues and challenges faced by the BAME sector. This included prejudices and assumptions about financial skills and capabilities, just because an organisation may be classified as ‘a small organisation’, based on its size.

Before embarking on the selection of the shortlist, there was a discussion on the need to brief the panel on some core insights from a Diversity, Equality and Inclusion perspective, e.g., which communities experience structural discrimination and exclusion in the context in the boroughs you are proposing to prioritise.

The group stressed the need for all future panel members to:

1. **Continue to have BAME representation.**
2. **Have a compulsory joint induction to ensure everyone on same page re criteria and scoring but also to embed a strong Diversity, Equality and Inclusion approach and eliminate prejudices and assumptions, reflect on unconscious biases.**

*" This sets a good precedence for other funders to talk to people like us with specialist knowledge of BAME community needs - we feel like we have been listened to and heard"*

3. Have some insight to the BAME community history and issues in the chosen boroughs i.e. have a culturally competent approach to assessment.

## General comments

There were some specific comments around the following Round 1 section:

*"An active role in local networks and communities, including some experience of engaging with local government and /or the community sector."*

*"Commitment to collaboration and engagement through capacity-building support to improve engagement and knowledge of the current EEFH support space."*

*"Experience in effective partnership working."*

It was suggested that points 2 and 3 above are combined as they are very similar. These requirements could become compressed criteria focusing on knowledge of the local community and partnership working.

The second statement needs to be more direct. For example, a commitment to the Capacity-building support over the two years as part of a package of support.

- Annual turnover should be between £50k - £650k
- The group were happy to have a threshold that says cannot apply for more than 50% of current turnover. They are familiar with this model and understand the risk management aspect.
- Do not need a question about number of staff as part of eligibility – should be asked as part of application.

- Make sure you are clear with your definitions – perhaps a link to a glossary sheet?
- The fund should encourage both help with overheads and actual project delivery. Agreed to propose a 60/40 split with 60% on delivery and 40% unrestricted (with guidance on what unrestricted could include – help to think outside the box).
- Organisations should be encouraged to use some of any allocated unrestricted or overhead costs towards development costs such as accreditation fees, quality mark fees, purchase of new equipment or software and memberships to specialist bodies.
- There should be annual or bi-annual conversation with LCF or grant management staff that allows for some fluidity and flexibility - specifically on budget spend, as the circumstances and journey changes. This 'conversation' should replace a simple budget submission that does not allow reflection.
- Essential to have better, and more comfortable relationship with the funder. It was commented that this whole co-design process is a very positive approach and a good sign of genuine commitment to collaboration and understanding ground-level issues.

- The group appreciated that a funder is able and willing to listen to BAME experienced based organisation and look at systems change approach that ultimately benefits all stakeholders.
- A suggestion was that all successful applicants are given support to develop a theory of change or logic model as part of induction (possibly a capacity building training topic).

### 3. LANGUAGE

1. Rather than the term **Capacity Building** which feels derogatory, they would prefer to use **Organisational Development** with an explanation that includes the term 'empowerment'. There was a good discussion to differentiate between organisation need and leadership needs and the importance of focusing on both running parallel. There was also a suggestion to use 'Organisation empowerment' as a title/term.
2. If there are terms like intersectionality used etc. then there should be a simple glossary.
3. Instead of EEFH – consider using **economic independence**. There was a lot of discussion around this.

## 4. APPLICATION FORM

**4.1 The application form** should be a relatively short form with the following core sections:

1. Organisation information – basic organisational information including aims and objectives
2. Eligibility list (can this prioritise BAME, BAME women and BAME young people?)
3. Your work
  - Which priority area/s does your work support?
  - What do you do?
  - Who do you support?
  - Why do you do what you do?
  - How do you know there is a need (internal and external data/knowledge)?
4. What will the funding achieve? (with space to provide up to four outputs and up to three outcomes linked to the funds criteria). This should also have space to specify the funding split between project costs and core costs (overheads)
5. Financial Information – the financial position form should be completed after shortlisting
6. Capacity Building/Organisation development/organisation empowerment
7. Specific questions about the areas of needs. See section 8 and 9 below
8. Organisation references



## 4.2. Additional points

- A short prospectus or guideline should be created
- Agree scoring system for any narrative questions
- Offer a clear option regarding core and/or project funding and ensure any follow up questions are relevant – especially M&E questions
- The form should have relevant questions to reflect that some funding will be for core costs and not projects
- The questions need to be simple and follow the flow of what, why, when, where, who – delivers, who benefits and how.
- The form should have tips or the ‘I’ button that pops up with guidance. They do NOT want sample answers
- They really valued the meet the funder session as it broke down animosities and power dynamics. Although they did say that was linked to our personalities and we were of similar backgrounds. It did not feel like a ‘them and us’ power dynamic.
- There should be an explicit question on inclusion/diversity either (here or as a core interview question) – internal and service user accessibility. The first stage form should be simple but cover all grounds with transparent scoring system. Say in the margin what the maximum score could be.
- Policies should not be asked for before the second stage – only tick boxes except basics such as constitution, accounts.
- The whole group agreed on the use of weighted scoring matrix in relation to the application process and EDI response. They suggested a scoring matrix:
  - 45% on the content of the application
  - 40% on the interview at shortlisting
  - 15% on DEI

Any basic eligibility form should have explicit reference to the fund’s objectives and ask for a breakdown of the percentage of beneficiaries against each identified criteria or category. This will allow organisations to reflect on the intersectionality of the work they do. Most organisations deliver on multiple, cross cutting themes.

### Example question

Who are your primary beneficiaries when working on ZCT’s priority issues: Mental Health, Isolation or Food poverty? Please reflect your beneficiaries in percentages

Percentage	(%)
Education	20%
Employment	60%
Financial health and resilience	20%
BME Communities	5%
BME women	10%
BME young people	85%

### 4.3. Possible DEI questions

Some potential DEI questions for the shortlisted organisations to consider either in the form, final interview are suggested. Remember to be clear about your definitions

**Describe or explain:** How you will consider diversity, equity and inclusion in the development of your work/project (for example unintended exclusion of minority groups, recognising bias)

#### Points to consider

- How are you considering the diversity of end users for your work (product, service, or general work)?
- How do you avoid or prevent bias or how do you diversify perspective in your delivery?
- Do you have any strategic partners who can help to maximise your impacts to promote DEI?
- In 200 words, can you articulate why promoting DEI is good for the project/work and your organisation?
- Are you collecting any DEI data? e.g. on gender, age, disability status and ethnicity, What do you intend to use this data for?

**Describe or explain:** Any policies or approaches to diversity, equity and inclusion your organisation might have

#### Points to consider

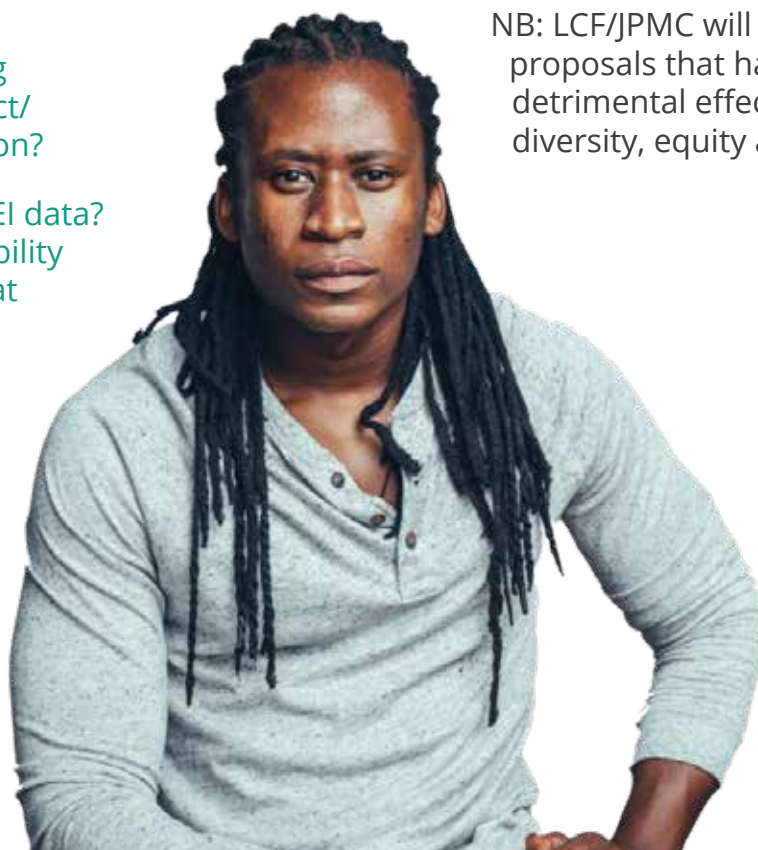
- Who makes decisions in your organisation? How diverse is your organisation, board, executive team?
- Does your company have any policies linked to DEI e.g. grievance, behaviour & respect policy, whistle blowing etc.?

**Describe or explain:** How you will promote diversity, equity and inclusion for any roles you are recruiting for in this project

#### Points to consider

- How will your recruitment policies consider DEI specifically?
- Will you review language and content in your job adverts for bias?
- How will you ensure that your job opportunities access talent from under-represented groups? e.g., BAME communities, LBGTQ+ or women?

NB: LCF/JPMC will not fund proposals that have a detrimental effect on diversity, equity and inclusion.



### Important things to remember:

- You don't have to be an expert on equality, diversity and inclusion
- The core focus of your project does not have to be on DEI but you must consider how and where you will address DEI as prompted in the application questions
- Successful organisations have the opportunity to further develop DEI work through the JPMC capacity building support.
- Why are you the right organisation to do this work?

### 4.4. Face-to-face or online interviews

Ahead of any face to face or online interviews that are part of the formal selection process, there should be a few standard questions shared in advance with the option to ask any bespoke questions relevant to the organisation and their application, (suggestions below). A clear scoring sheet for each panellist should be developed. A clear scoring sheet for each panellist should be developed.

Example questions:

- What do you want to change? Tell us what the problem is that you are trying to fix. This should be a problem that links to at least one of the JPMC priority areas.
- How do you know the need exists?
- Who do you want to help and support? Why have you chosen this group of people? How will you target this cohort?
- How much are you asking for and how

will you spend it? Tell us how much money you want and what you will spend it on – this can be a split between core funding and/or project funding.

- How will you measure and track any achievements, benefits and changes in relation to one or more of JPMC's priority areas as a result of this grant? (project specific or core)
- Why are you the right organisation to do this work?

## 5. COMMUNICATIONS & RELATIONSHIPS

- Ensuring there is a good level of cultural competency when engaging with diverse audiences reflecting and taking account of lived experiences, cultural relevance, nuances and needs. Using all mediums of communication including: images; funders websites; published material; conversations, and interviews. This may also involve generic unconscious bias training using targeted insights to specific communities and geographies which may be determined by a focus on targeted demographics.
- The storytelling and messaging from funders is key.
- How will future communication materials get out to the community organisations and networks that serve the diverse populations you need to reach?
- How will the messages you are communicating foster inclusion, respect and equity? Are there concepts

or terms that may be culturally specific that need to be changed to make them more accessible?

- Images – materials and website content need to be relevant and appealing.
- Any people portrayed in the images should be appropriate. Images should portray positive images that promote equity and break stereotypes.
- Language – The importance of using plain language, elimination of the passive voice in text is important in positive DEI practice. This should be applied to the Guidance document, application form, interview questions, website material as well as any material for shortlisting and assessing panellists. Make the language and terminology accessible but also current. For example, terms like ‘social change’ may not resonate with some people, and terminology should be clear to ensure a common understanding.
- Outreach – Funders should reach out to external organisations to promote what you do and how you do it, to seek help and support and encourage organisations that are under your radar to be noticeable to you. Your DEI approach when more visible will show you as a true ally.

## 6. ACCESSIBILITY

The issue of accessibility was looked at from a number of perspectives:

1. The funder – How is the funder perceived and how the funder reaches out to organisations that would not usually consider applying. There was strong recognition and

appreciation that this initiative and the co-design approach is a genuine way to understand BAME communities and BAME community issues.

2. It was recommended that funders review the language used and the images used when aiming to appeal to BAME and grassroots community organisations – minimise the jargon. There was also recognition and value of the ‘meet the funder session’. Strong feedback was about the semi-formal approach and the presence of ARE reduced the ‘them and us’ feeling.
3. The process – Streamlining the application process was welcomed and the recommendation of either a video submission or interview/meeting should strongly be considered.
4. This was primarily due to the fact that many BAME led organisations are led by BAME individuals that either have limited fundraising experience or struggle to articulate in written form compared to verbal.
5. Many BAME communities are traditionally oral communities. The option to speak to the funding panel also helps accessibility, and by allowing different experts to be present in the room, relieves the stress and burden on one person.
6. The application form – the shorter first stage is welcomed for both accessibility to the process but also ensuring that expectations are managed when facing rejection, i.e., the proportionate effort vs. number of rejections by funders.

## 7. SPECIALIST INSIGHTS FROM A BAME PERSPECTIVE

Each of the organisations selected to contribute to the co-design process recognised their unique position to help shape and give insight to a new funding approach.

They were able to provide insights from a community, grassroots perspective and specialist BAME community issue/s perspective as well as intersecting with specific geographical, gender, language or socio-economic perspectives.

Each organisation provided insights from a community, grassroots perspective and gave a specific BAME community issue/s perspective as well as intersecting with geographical, gender, age, language or socio-economic perspectives. It is vital to incorporate diverse experience-led lenses when designing and delivering funding programmes.

*“ I have learnt a lot from the process and from colleagues - we don't usually get the time or space to share similar experiences”*

## 8. CAPACITY BUILDING/ ORGANISATION DEVELOPMENT MODELS OF SUPPORT

The co-design group were given the opportunity to reflect and help shape any future capacity building support in three ways:

- as a collective,
- as individual organisations;
- and through a short field work task where they engaged with organisations in their geography or specialist areas of work.

Below are some key messages received from the three approaches.

As part of a 'package of support' (funding, expertise and good grant management), a range of support methods is desired to accommodate different capacity levels of the funded organisations and diverse learning styles, i.e., Workshops, 1-2-1 specialist support and peer learning sessions.

The proposed methods are:

### 8.1. Generic workshops

A set of generic workshops over the two years for all funded organisations to attend. These need to be at intermediate or higher level. The feedback suggested that Council's for Voluntary Services and other resources, offer basic level workshops.

These workshops should also be practical and solution focused, i.e. content that helps implement any learning rather than just facts and theory.

Topics suggested at this stage included:

- Voice and visibility
- Policies and governance
- Safeguarding
- EDI
- Project management
- Fundraising strategies
- Bid writing/winning contracts
- Digital confidence
- Influencing policy
- Financial management and budgeting
- Self care
- Good recruitment practice

## 8.2 One-to-one support

The 1-2-1 support should be allocated as a financial value rather than just fixed number of days. This will give some flexibility to the level of support and the varying day rates of consultants based on topics and/or level of support.

The value is spent by them by allocating to consultants from the 'recognised' pool of specialists and consultants. They do not hold the money in their accounts (this will be by the organisation commissioned to manage the capacity building programme) but are aware of the monetary value.

## 8.3 Specialist Support

The group asked if specialists from JPMC could also be either included in the pool or be an additional strand of support. This was little vague at this stage in relation to the fields of specialist support but did allude to core areas such as VAT, financial systems, marketing and branding, leadership coaching etc.

Each successful organisation could suggest or put forward advisors/consultants to the central pool held by the managing organisation. This could be people with a previous relationship to the organisation, specialists in relation to geography or topics, people with lived experiences or cultural competency or simply because of been able to speak the relevant community languages.

However, anyone recommended would need to be vetted and undergo the usual due diligence by the coordinating organisation to be placed in the pool of consultancy providers

## 8.4 Peer learning

There was a strong reference and endorsement of some form of practical peer support element to be included in the package.

It was felt that from experience (including these co-design sessions) that it is important that leaders or key works have a space to reflect and learn from each other especially on issues that they have battled with



and to hear solutions and good practice. The example shared was around recruitment and retention. ARE proposed a bespoke version of action learning which was positively received.

## **9. CAPACITY BUILDING/ ORGANISATION DEVELOPMENT SUPPORT NEEDS**

As a baseline, ARE provided a list of generic topics from previous capacity building support sessions via a number of projects.

The list below has also taken into account feedback from the co-design sessions.

1. Area of support
2. Funding sources and options
3. Safeguarding and Health and Safety
4. Governance and trustee Support
5. Networking and memberships
6. Premises - new or alternative space (advice and guidance on tenancies)
7. Contracts and Legalities
8. Financial planning (future) budgeting, forecasting and core funding
9. HR – recruitment and retention.
10. HR – Safe and ethical working policies and procedures including home working and lone working for staff and volunteers.
11. General post-Covid19 organisational health check
12. Marketing and messaging
13. Bid writing/funding applications
14. Project exit strategy
15. Policy and procedures / document review
16. Organisational repositioning / strategy and structure
17. Partnerships and/or collaboration
18. Premises – existing location (advice and guidance on lease agreements and legalities)
19. Leadership support including coaching and change management
20. Financial management (current) e.g., management accounts, project spending
21. HR – redundancies/flexible working (working from home)
22. Organisation continuity planning
23. Media/Social Media
24. Volunteer management – strategy/ recruitment and retention
25. Access to policies and documents
26. Quality assurance
27. Accreditation
28. Equipment/software
29. Diversity and inclusion

*"I appreciated that we have been noticed and given the space to input into a range of topics - the application form, the process, the language and the criteria"*

A summary of discussions about the support needs that can be supported by the package of both financial and non-financial support include:

- Governance – support with re-positioning and re-evaluating the purpose and strategy for BAME organisations – especially as part of the covid recovery.
- Sustainability – help with developing robust plans including diverse funding strategies. Reference to diminishing reserves and a high risk of closure was echoed by several organisations – especially the small BAME organisations.
- Reporting – the series of small funding programmes has been appreciated, but the added burden of the bureaucracy and multiple reports for relatively small grants is of concern.

Organisations need to be guided and encouraged to budget for monitoring and evaluation tools, expertise and staff time needed for reporting

Funders need to consider the proportionality of their individual reporting requirements but also be aware of the multiple reports been prepared by any one organisation. Increased core funds to allow organisations to increase staff hours to oversee reporting should be considered in addition to any future project funding.

- CRM systems – supporting the development of appropriate, affordable and safe CRM systems that will allow for continued remote working. Organisations identified a need for both the investment in new systems

but also skills development through ringfenced additional funds or pro-bono resource through corporate links.

- Goods in-kind – To support an organisation's core resources and functionality including IT - laptops, PC's, software, licences etc. as well as resources for beneficiaries including starter packs, food/hygiene products, learning resources, IT – laptops/ PC's/phones/software etc.
- Pro-bono legal, HR and bid writing support and website development.
- Cause sponsors/champions/patrons – they spoke about the lack of capacity and knowledge to promote the work of their organisation on to a wider public platforms for both awareness and fundraising purposes.

Having people to champion 'the cause' on social media platforms including via influencers, events, articles, radio etc would increase presence and visibility of what is been achieved but also a continued voice to maintain the issues in the public spaces.

- Mentors and Coaches – Leaders can be lonely in their spaces with little resources available for personal growth, channelling ideas or sharing experiences with like-minded people or with those working on similar challenges based on geography, issue or communities.



Mentors and/or coaches from any sector will add value to the talents, energy and resilience of the BAME sector.

- Measuring social impact – conversation eluded to the need to ‘justify our existence’ through some of the conversations. Although the issues affecting BAME communities are visible and evident, it was felt that support with a review of the work is needed to a) showcase the work better b) show funders the value of the work beyond the formal ‘value for money’ concept c) inform future funder strategies and programmes.
- Mental Wellbeing support – the impact of Covid-19 on BAME communities - supporting people and families with multiple and complex issues has taken a toll. The volume and pace of work as well as accommodating new ways of working, balancing home and work responsibilities took a toll on many people.
- Sharing of good practice/resources – New resources and new ways of working have been developed that need to be shared. Funders need to create spaces and platforms for funded organisations to share the learning and ongoing challenges. Organising and facilitating such spaces requires resources and capacity.
- Facilitating collaborations and networking – through online virtual meeting platforms, the chance to engage with other similar organisations across can be powerful for both shared learning but also initiating potential collaborations

based on specialist issues and/or specific communities. Scoping and facilitating potential collaborations requires resources and capacity and should be considered as part of increasing hours of leadership/core staff.

## 10. MONITORING AND EVALUATION

As part of the co-design process, the cohort engaged with Ubele, specifically with Karl Murray, Evaluation and Learning Partner. Karl was able to engage with the cohort both on a one-to-one basis and during a scheduled group session.

This session explored how organisations can and should demonstrate achievements, benefits and change to both the organisation and the service users/clients as a result of any funding received.

Over the course of any future grants, the group expect LCF and JPMC to engage with and learn from the funded organisations, build the relationship, and monitor the progress of the work supported and the impact on social issues. Although social change is in most cases long term and complex, it is good to think about the journey of social change throughout.

Good practice with the DEI lens includes:

- Clear communication of M&E expectations before awarding the grant including clear objectives. The grants will offer core funding so building trust is essential
- Ask the question – ‘what does success look like?’ This allows different contexts and intersecting issues to be included.

Ask the organisation what meaningful change looks like for them and the best way to capture this progress (including the kinds of reporting you require). Shared ownership over the evaluation process will help build trust, set clear expectations, and allow organisations themselves to lead in determining what has been working for them.

*"Thank you for the opportunity for me to talk about the practical barriers to smaller BAME charities to access funding"*

- Clear questioning, differentiating outputs and outcomes based on project funding or core funding. Quite often, funders streamline the process which can complicate the quantitative and qualitative data gathering in the long run.
- How to measure the added value especially if the funding is used for overheads or core costs
- Consider how you collect information about the progress of work throughout the duration of a grant. How is this information also meaningful to the partner organisation? Are there barriers for the partner organisation (e.g., technical, cultural, language) to engaging in this information sharing process? How might this process be biased toward well-resourced groups? If possible allow flexibility in how information is provided to you

The group recognised that measuring impact is a weakness in the sector, so it may be worth asking whether any pro-bono support from JPMC employees could help in building capacity in terms of monitoring and learning.



**ARE champions fairness, challenges discrimination and pioneers innovative solutions to empower young people through education, employment and enterprise.**

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