

Relationship and reporting guidelines - Youth Fund grants

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If, at any time, you wish to refer back to [PHF's strategy](#), [our values](#), or the particular goals and aims of each fund, you can find this information on our website: [Youth Fund](#).

1. Introduction

The purpose of the Youth Fund is to provide core support to help organisations working with young people which have the potential to:

- Sustain, grow or prepare to grow the organisation's impact.
- Improve, consolidate and spread practices which empower young people to shape their lives and lead change (sometimes called asset-based approaches).

- Support and champion people with lived experience in the leadership and delivery of this work, particularly people who are most affected by systemic oppression and or discrimination.

Through the Fund, we are looking to build a cohort of organisations working with young people facing complex transitions who share a commitment to a positive, asset-based approach.

Individually and together, we hope you will be able to influence others to work in this way.

We are interested in learning about and from your work.

We ask you to reflect on your experiences and share your learning to help us to:

- understand how the work is going, and provide support if appropriate;
- to better understand what works and what doesn't and how doing things differently can work in different contexts;
- share the learning from your work with others in the field who are interested or doing related work;
- understand the impact of our grants and whether they are helping to achieve PHF's strategic aims; and understand whether we need to change anything about the Youth Fund e.g. the length of grants or types of support available.

The conversations that we have with you and the reports that you submit will help us to do this. We encourage you to be as open as possible in your conversations with us and your written reports. We recognise that things do not always go to plan and that you, and we, can learn a lot from such experiences.

The following outlines expectations for those organisations receiving funding. This includes what you can expect of PHF as a funder and what we expect from you.

2. Relationships (Contact and Visits)

You will have a named Grants Manager at PHF who will be your main point of contact through the course of the grant. We will liaise with the contact named in the application, so please let us know if this person changes.

We may not be able to visit all organisations that we work with, but will do so as and when we can, and welcome invitations for significant events that you may be hosting.

Through the Youth Fund, we are keen that you have space to deliver the work as well as to learn and develop. We will make contact with you at specific intervals, but you should not hesitate to contact us if there is anything particular you think we should know about or would be interested in. In particular **we request that you contact us if there are any significant changes to the work, the budget, or within your organisation at any time during the course of the grant. This includes informing us of any safeguarding incidents as detailed in your grant Terms & Conditions, and as required by the Charity Commission.**

3. Communications & Publicity

We are keen to hear your news and would like to publish news items and blogs about your activities and learning. Please contact your Grants Manager or our communications team if you would like to contribute. You can see more information, including some 'top tips', [on our website](#).

You can also connect with us on Twitter using [@phf_uk](#), on Instagram [@PaulHamlynFoundation](#) and on Facebook at [Paul Hamlyn Foundation](#)

We would like you to acknowledge the support we are providing by placing our logo on your website or printed material. You can find different versions of the logo [on our website](#) or contact our communications team for further information communications@phf.org.uk

4. Learning & Practice improvement

We are keen to support organisations involved in the Youth Fund in more ways than with funding. We will be providing a variety of opportunities to build relationships, collaborate, and share learning and possibly additional support around impact

and organisational development. This is generally on an “opt in” basis.

We will send further details as these opportunities arise and discuss them during the set-up call.

- Please join the Youth Fund LinkedIn Group where you can connect and share with other organisations supported through the Fund
- We will invite you to two convening sessions during the course of your funding. This will be with a group of around 25 recently funded organisations in the Youth Fund and provide a chance to network and hear more about asset-based approaches, and what this means for you as organisations and for the young people you work with.
- We host regular drop-in zoom sessions on a variety of topics to enable sharing and learning across the funded cohort
- You will also have access to our peer network which includes a peer buddy scheme, Action Learning Sets and Communities of Practice. This is an independently facilitated network providing confidential spaces to share, learn, receive and provide support. It is focused on organisational learning and personal leadership/self-development.

The Youth Fund was initiated in 2015 and an independent evaluation was completed in the first three years of the programme. This helped us to understand how and how well the Fund as a whole was working. You can access the evaluation report and accompanying resources [here](#).

5. Progress & Impact (monitoring and reporting)

We have set up several touchpoints throughout your grant to facilitate monitoring and reporting:

- A “set up call” at the beginning of your grant
- An update phone call at 11 months (just before your second payment is released)
- A written interim report at 23 months (just before your final payment is released)

- A written final report due 2 months after your grant has ended.

The due dates for the update call and written reports are specified in your grant acceptance form. We appreciate that timelines may need to shift. If you need to request an adjustment to the due date, please contact your Grants Manager.

a) **Set up call**

Once you have been awarded a grant, we will get in touch to introduce ourselves. At this point we will discuss and agree a small number of outcomes and/ or objectives relating to your proposal and your plans for sustaining, growing or preparing to grow your impact. You will report against these throughout your grant. This conversation will be an opportunity to ask any questions you may have about the grant, associated support and relationship with us.

b) **Update call - 11 months**

We will offer you a phone call at 11 months - this will enable us to have a conversation with you before we release the second payment of your grant. We are particularly interested in how and to what extent the grant has contributed to any change or development for your work and organisation. We have outlined the areas that we will cover in the call below, although not all the questions outlined below will be relevant to everyone. By sharing them here we are aiming to give you a flavour of the type of information we would like you to share with us, to enable us and you to reflect on the grant and what it has achieved or enabled.

Progress and delivery

- What progress have you have made with undertaking the activities or organisational development work that was planned?
- What progress has been made against the agreed outcomes and/or objectives?

Approach to working with young people

- Has your approach to working with young people developed this

year? And if so how?

Organisational development and finances

- Have there been any changes to the organisation, funded posts or planned activities? What caused them or why were they made? What have they meant for the organisation, in particular in relation to sustaining, growing your impact or preparing to do so?
- Any changes in the leadership or governance of the organisation. What has this meant for the organisation?
- A brief check on the financial health of the organisation. We would like a copy of your annual report and accounts (if you have published new ones since you applied) as outlined in the terms and conditions of your grant.
- An update on grant expenditure.
- Any learning about safeguarding arising from the work delivered over the past year, including how your safeguarding approach is working, any key risks and (if not already reported) any safeguarding incidents

Learning

- What have you learnt from the work so far?
- How have you used this learning to develop your approach? This might be about diagnosing your organisational development needs or addressing them.
- Any interesting events/learning/reports that you want to share with us and/or other organisations supported through the Youth Fund.

Future plans

- Looking ahead, a brief account of how you are going to use what you've learnt in delivering the next stages of the work and what your plans for this are.

We will cover these points in a conversation with you. You are welcome to submit a written report at this stage, but this is not required.

c) **Update report - 23 months**

We will request a written interim progress report 23 months into your grant. At this stage we are interested in understanding how you are getting on with sustaining, growing or preparing to grow your impact, and what you see as the next steps. We are particularly interested in how and to what extent the grant has contributed to any change or development. Once we have reviewed the report, your Grants Manager may contact you to discuss it further. We aim to do so within one month, but at busy times this can take longer.

You may cover the key points in any way that is most appropriate and are welcome to include illustrations and photographs. We prefer reports to be no longer than 5 A4 pages if possible. If you wish to submit additional information as appendices you are welcome to do so. If you produce reports for other funders or stakeholders which cover these questions, please feel free to submit these to us. The questions below are meant as a guideline only; you may structure your report however works best for you.

In this report please tell us:

Progress and delivery

- What has the grant enabled your organisation to do so far? (description of the work / activities undertaken, who has been involved and what their roles are)
- Description of the context of the work and relevant changes during the course of the grant, e.g. changes in your local context, new partnerships, changes in funding, or wider factors that affect the organisation.
- What progress has been made against the agreed outcomes and/or objectives, and on the chosen elements of sustaining, growing or planning to grow impact that you are moving forward with?
- Who has been affected by this work so far (young people, staff, partners, stakeholders, decision makers?)

Approach to working with young people

- Has the number of young people your organisation works with increased or decreased since you applied, and why?
- Has your approach to working with young people developed further? And if so how?

Sustaining or Growing your impact

- Have there been any changes to your original plans in relation to growing impact? If so describe them, explain reasons for them and what the implications of these are. This could include unexpected outcomes (positive or negative).
- Has your organisation developed its wider impact this year, e.g. through influencing or collaborating with other organisations? How has this gone?

Organisational development and finances

- What have been the main successes and the main challenges for your organisation this year? What have these meant for the organisation? This includes any update on the organisation's financial health and any changes in leadership or governance that have happened during the course of the grant.
- An update on grant expenditure
- An update on the organisation's budget and finances. We would like a copy of your annual report and accounts (if you have published new ones since your last report) as outlined in the terms and conditions of your grant.
- Any learning about safeguarding arising from the work delivered over the past year, including how your safeguarding approach is working, any key risks and (if not already reported) any safeguarding incidents
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Learning

- What have you learnt over the past 2 years, and how will this shape your plans for the remainder of your grant?

- Any key events/learning/reports that you want to make us aware of

Future plans

- A brief account of how you'll be delivering the next stages of the work for the remainder of your grant. What are your plans, and what ongoing development will be required?
- What do you expect to achieve, in terms of sustaining or growing your impact, with some confidence, by the end of the funding period?
- Your future plans for funding this work.

We recognise that not all work will go to plan. We hope that you will feel supported to reflect openly and honestly on the impacts and implementation of the work, and to learn from it to inform your future plans and activities. This learning is also beneficial for PHF as it will help us to develop our own understanding of your work and context.

To submit your report, please go to your online [account](#). Once we have reviewed your report, we will get in touch to let you know and share any questions or feedback. We aim to do this within a month, but this can sometimes take longer during busy periods.

d) Final report and conversation

Your final report will be due two months after the end of the grant period and should provide an update since the 23 month report. We are particularly interested in how and to what extent the grant has contributed to any longer term change or development.

You may cover the key points in any way that is most appropriate and are welcome to include illustrations and photographs. We prefer reports to be no longer than 5 A4 pages if possible. If you wish to submit additional information as appendices you are welcome to do so. If you produce reports for

other funders or stakeholders which cover these questions, please feel free to submit these to us. The questions below are simply a guideline; you may structure your report however works best for you.

In your final report we are interested in finding out:

Progress and delivery

- What has the grant enabled your organisation to do so far? (description of the work / activities undertaken, who has been involved and what their roles are)
- Description of the context of the work and relevant changes during the course of the grant, e.g. changes in your local context, new partnerships, changes in funding, or wider factors that affect the organisation.
- What progress has been made against the agreed targets and outcomes (if any specifically agreed) and against the chosen elements sustaining, growing or planning to grow your impact?
- What influence has this had and who has been affected by this work so far (young people, staff, partners, stakeholders, decision makers?)

Approach to working with young people

- Has the number of young people your organisation is working with increased or decreased since you applied and why?
- Has your approach to working with young people developed/changed over the course of the grant e.g. through influencing or collaborating with other organisations? If so how and why?

Sustaining or Growing your impact

- Have there been any changes to your original plans in relation to growing your impact? If so describe them, explain reasons for them and what the implications of these are. This could include unexpected outcomes (positive or negative).

- Has your organisation developed its wider impact over the course of the grant, e.g. through influencing or collaborating with other organisations? How has this gone?

Organisational development and finances

- What have been the main successes and the main challenges for your organisation over the course of the grant? What have these meant for the organisation? This includes any update on the organisation's financial health and any changes in leadership or governance that have happened during the course of the grant.
- A breakdown of total grant expenditure.
- An update on the organisation's budget and finances. We would like a copy of your annual report and accounts (if you have published new ones since your last report) as outlined in the terms and conditions of your grant.
- Any learning about safeguarding arising from the work delivered over the past year, including how your safeguarding approach is working, any key risks and (if not already reported) any safeguarding incidents

Learning

- What have you learnt over the course of the grant, and how will this shape future plans?
- Any changes or developments in your practice or your ways of working with individuals, communities, partners and/or stakeholders, including any reflections on safeguarding and issues relating to diversity, equity and inclusion within your work.
- Any key events/learning/reports that you want to make us or the other organisations supported through the Youth Fund aware of?
- Did you engage in any events bringing organisations supported through the Youth Fund together or take up any

additional support from PHF during the course of your grant. What, if any, benefits did this bring?

Future plans

- Looking ahead, a brief account of your ongoing organisational development plans and any next steps in terms of growing your impact.
- What do you expect to achieve, in terms of sustaining or growing your impact, with some confidence, by the end of the funding period?
- Your future plans for funding this work.

We recognise that not all work will go to plan. We hope that you will feel supported to reflect openly and honestly on the impacts and implementation of the work, and to learn from it to inform your future plans and activities. This learning is also beneficial for PHF as it will help us to develop our own understanding of your work and context.

To submit your report, please go to your online [account](#). This is the same system that you used for submitting your grant application. A form will be published to your registered online account under the Requirements section, you may then submit your report online. If the primary contact & email address of the grant changes, you should let us know so we can update who these report forms are published to.

Once you have submitted your report, we will ask you for a short a phone call, to ensure we have a chance to reflect and learn from the work. We will have read the report before we speak so we hope you can find about 30 minutes to share any highlights with us, in particular any learning over the course of the grant and feedback on the way we've worked with you.

e) How to submit your reports

You will be able to submit your reports through your online [account](#). This is the same system that you used for submitting your application. A form will be published to your registered online account under the Requirements section, you may then submit your report online. If the primary contact & email address of the grant changes, you should let us know so we can update who these report forms are published too.

The maximum size of the documents that you can attach through our online reporting system is 5MB. If you are using illustrations or photographs in your report, please make sure they do not take you over this size limit.

Please note that our online submission system cannot accept video or sound files, but if you have some supporting information in this format send it to your Grants Manager via email. If you have any issues submitting your report online, please contact your Grants Manager.

f) How we will use your reports

We will treat your reports as confidential. We may use information from them, alongside information from other organisations supported through the Youth Fund, to produce analyses that can help us to assess the overall impact of our funding and share the learning from projects with other people. We may wish to develop a few case studies based on reporting information, but would seek permission before using any information you have submitted in this way.

We will not identify you in any reports that we plan to share outside the Paul Hamlyn Foundation without your permission.

If you have any questions or have any difficulties with submitting your report please contact your Grants Manager or email whapgood@phf.org.uk

6. **Follow-on funding**

We offer Follow-on funding for a small number of organisations as they come to the end of their initial grant through the Youth Fund. Follow-on funding will be by invitation only. It is worth noting that we expect to make only a small number of Follow-on grants and will therefore only invite those that are the strongest and closest fit to our criteria. If you are not invited, it is not a reflection of the value of the work that you do.

In order to be considered for Follow-on funding, organisations will need to meet all of the following criteria:

- Show clear potential for further growth in their impact with – and for – young people over two years;
- Have developed their practice in terms of asset-based approaches over the past three years, and know how they will continue to do so with further support;
- Are financially stable and can demonstrate financial sustainability for the duration of the follow-on funding investment period. We will take into account the external context when judging this criteria and adjust our expectations accordingly.

Following your 23 month report, we will contact you and let you know if you are being considered for follow-on funding. We aim to do so within one month of receiving your report, but this may take longer at busy times. We will use your report to help us understand your suitability for Follow-on funding in line with the criteria outlined and with reference to the current portfolio and strategic interests of PHF. . We will then invite you to submit a short proposal to demonstrate how you meet the criteria and what a further investment would enable in terms of impact with and for young people.