

Evaluation of Youth Investment Fund 2

**Interim Report
October 2024**

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Executive summary

The Youth Investment Fund Phase 2 (YIF2) aims to provide more equal access to high-quality youth facilities and a broad range of activities to improve outcomes for young people. YIF2 aims to create, expand, and improve up to 300 youth facilities providing more safe spaces for young people through which youth organisations can reach and deliver more programmes. These new and upgraded facilities are expected to result in around 45,000 more young people per year regularly taking part in positive activities in the targeted areas.

YIF2 was open to organisations in geographic areas with high levels of need and gaps in youth provision, covering 45 upper tier local authorities and 674 wards in England. Eligible applicants needed to either be delivering or intending to deliver open access youth activities outside of school hours and have an eligible organisation status, such as being a registered charity, or local authority.

YIF2 will be delivered over three financial years from 2022/23 to 2024/25 and all grant funds are required to be spent by the end of March 2025. The total funds available after the costs of distributing and evaluating the fund is £220 million in capital grant funding for creating or enhancing buildings and £39.91 million for revenue grant funding to support activities in those facilities.

An intermediary grant maker (IGM) was appointed by the Department for Culture, Media, and Sport (DCMS) in August 2022. The IGM comprises a consortium led by the Social Investment Business (SIB) and incorporates the National Youth Agency (NYA), Key Fund and Resonance.

The evaluation

This is the first interim report from the evaluation of YIF2. The evaluation has three inter-related strands:

1. A **process** evaluation to understand how the assessment, distribution of funding and implementation of the capital investment programme worked.
2. An **impact** evaluation to assess the difference YIF2 made to youth organisations, and to young people.
3. A **value for money** evaluation to assess the value to the public purse of the funding.

This report forms part of the process evaluation and is focused on the promotion, assessment of applications, and early distribution of the fund. It synthesises findings from:

- **Analysis of programme monitoring data collected by the IGM:** The data in this report covers the period from 1st August 2022 to 1st June 2024.
- **Qualitative interviews undertaken at two time points:** Seven interviews with DCMS staff, twenty-seven interviews with staff from the IGM consortium, fifteen interviews with ineligible applicants, fifteen interviews with unsuccessful applicants, and fifty interviews with grant holders.
- **A survey of applicants:** All eligible fund applicants, both successful and unsuccessful, were contacted by email and invited to take part in an online survey (N=392). There was a response rate of 70% from successful applicants and 49% from unsuccessful applicants.

Funding awarded and interim report fund status

The timeframes for distribution of the funding and completion of funded projects have been a considerable challenge. They have resulted in the IGM having to undertake aspects of the design, development and delivery of the fund in parallel when ideally, they would have been undertaken in sequence. They have also resulted in a leaning towards applications for projects that were perceived to be more ready and could be implemented within the fund timeframes. Stakeholders, staff, and grantees felt that the annual funding profile did not sufficiently reflect the complexity of capital investment and led to timing risks that were difficult to mitigate.

The IGM processed over 1,000 applications to the fund, of which 270 were approved. All eligible local authority areas have facilities that were awarded funding. The total capital funding awarded was £246 million. There were 16 large scale construction projects (6% of the portfolio), which combined accounted for over a quarter (26%) of the investment. Refurbishments accounted for the highest number of projects (more than half of the total), but just 22% of the overall investment.

Organisations awarded capital funding could also apply for revenue funding. Around £17.5 million of revenue funding was applied for by grantees. One in five (19%) grantees did not initially apply for revenue funding, in part because they were not clear what could be applied for under this part of the fund. In some cases, applicants were encouraged by the IGM to apply for more revenue funding and for different categories of revenue support. By 1st June 2024, the total amount of revenue funding awarded to grantees was £27.5 million – almost £10 million more than initially applied for.

Pre-construction grants were introduced in January 2023 to provide financial support to youth organisations for the development of high-quality applications. £2.5 million was provided in pre-construction grant funding. These grants were deemed invaluable to supporting grantees' technical drawings, surveyors, and legal work.

Marketing and fund promotion and application

To raise awareness of the fund DCMS staff sought to prepare organisations for the fund by engaging with Local Authorities prior to the official launch, even though there was minimal detail. Once appointed the IGM worked proactively to promote the fund, reaching out to youth providers with whom they had existing relationships, using social media and sector newsletters to market the fund. Following the announcement of the first funded projects in May 2023, the IGM incorporated 'success stories' into their promotion of the fund on their website and in external facing communications.

The fund received over 1,000 applications, totalling over one billion pounds, more than three times the amount of funding available. Applicants welcomed YIF2 and expressed that it was the first capital investment opportunity for the youth sector in many years.

Over a third of applications (37%) were recorded as ineligible in the programme data typically at the first stage of the assessment process. The geographic eligibility criteria were well understood by applicants, but they would have benefited from greater clarity on how open access youth work was defined to establish their fund eligibility. Not owning the building or site at which the project was planned was a common reason for applications being unsuccessful. Stakeholders reflected that it could have been beneficial for building ownership or lease status to be included in the fund eligibility criteria.

Programme guidance that set out what revenue and capital funding could be used for, and the importance of environmental sustainability for investments, would have been helpful for applicants in the

development of bids. Applicants were not sure about the weight given to the environmental sustainability of investments in the assessment process and were keen for the costs of their projects to appear reasonable. Clarifying how environmental sustainability would be assessed would have given applicants greater certainty about whether and how to integrate sustainable capital features into their projects.

Applicant assessment and contracting

The application process entailed an online EOI, followed by tailored support from an assigned Relationship Manager as a point of contact for those accepted at the EOI stage. During the application process, Relationship Managers sought further information from applicants on aspects such as governance, details of the capital project, and the team in place to support delivery. Applicants who received support from a Relationship Manager during the application process found it helpful (86%). Applicants described a collaborative process in which their Relationship Manager suggested they reconsider aspects of their application to improve it.

Once deemed ready by the Relationship Manager, each application was reviewed by the Assessment Panel, which was an expert group sitting independently. The Assessment Panel met monthly to review the applications against the three fund 'pillars' of organisational resilience, construction (the viability of the capital project), and the youth offer. IGM staff were felt to be responsive to feedback and requests from the Panel, which made the process productive and collaborative. Applications passing this stage, were then referred to the Grants Committee for approval. The Assessment Panel and Grants Committee process was seen by stakeholders as an effective and streamlined way to assess and approve the applications, particularly in the context of the volume of applications to the fund.

The assessment process was adapted during implementation to account for the timeframes and the awarded project portfolio, with the Grants Committee considering the balance of allocated funding between eligible areas over time. The IGM prioritised assessing applications for the largest funding amounts at the outset given that the timescales for completion of the funded projects was a challenge. Larger viable applications were generally expected to have planning permission in place. The requirement for planning permission to be in place varied between applications and over time, causing confusion among some applicants.

The IGM also aimed to select grant holders that were resilient and well-placed to deliver capital projects within the timescales of YIF2. The applicant survey suggests that this has been the case in practice, as successful applicants were more likely than unsuccessful applicants to have key aspects of good organisational management in place such as business plans, and volunteer management strategies.

Applicant understanding of the Assessment Panel process was limited. Applicants described having little information about what the process consisted of and how applications were assessed. Unsuccessful applicants were often unclear about why their application was rejected, and which part of their application could have been improved. Half of unsuccessful applicants (50%) were dissatisfied with the feedback provided. A lack of feedback fuelled views among some unsuccessful applicants that the assessment process lacked transparency, with some feeling they had been unfairly rejected.

Applicants' experiences of applying to the fund were influenced by their prior experience in applying to large capital funds and the level of resource and capacity they had available to work on a bid. Applicants without prior experience frequently underestimated the time and costs associated with applying. Applicants said that a clear roadmap outlining the grant making milestones and stages would have been useful. Without this, applicants felt it was difficult to understand progress and plan accordingly.

Staffing of applicant organisations became a central concern of the Assessment Panel, particularly when assessing the youth offer. The Panel continually identified applications where staffing was unclear or insufficient. The IGM responded by reviewing revenue requests to ensure that staffing reflected the proposed levels of expansion and providing support on this theme via the Central Support Offer.

The due diligence process took longer than grantees had anticipated. They did not have a clear understanding of the process and felt this had not been well-communicated to them. This stage commonly led to delays for grantees and their projects, which in some cases led to expired contractor quotes and rising capital project costs due to inflation, forcing some grantees to use contingency funds.

Creating new and improved facilities

Once grant agreements were signed, grantees appreciated the flexibility with which funding was distributed with payments amended to accommodate build progress. This was deemed appropriate given the volatility in the construction industry. Grants were made upfront rather than in arrears, which meant monitoring was critical but complex as payments went out and evidence was requested afterwards.

The fund timescales represented a significant challenge and the IGM sought to maintain the momentum of the portfolio by engaging a construction company (Turner and Townsend) part way through fund distribution. Stakeholders felt that Turner and Townsend had made a valued contribution to keeping construction projects on time. They felt that having a construction company involved from the outset would have been beneficial to support the IGM on the more technical aspects of monitoring grantees.

All grantees worked with a Relationship Manager who was responsible for providing support. Relationship Managers had a portfolio of around nine to 15 grantees and had at least one monthly update with each, with contact increased to weekly or fortnightly if there were challenges with the project. Overall, grantees found the support from Relationship Manager to be invaluable and welcomed advice about financial management, youth engagement and other topics. However, grantees noted that this was not as effective with challenges related to construction, and stakeholders also felt that the support may have been more effective if the Relationship Managers had more construction experience or a higher level of understanding of the construction process.

By June 2024, there were 151 approved packages of the Central Support Offer, totalling £732k. Main Fund grantees (44%) were more likely than Refurbishment Fund grantees (6%) to have an approved Central Support Offer package. The variety of support offered is notable, with grantees accessing 14 different types of support. Grantees that had attended Central Support Offer networking events and webinars found them useful and said they enabled them to build networks, share knowledge and learn from peers. However, stakeholders generally felt that the Central Support Offer became available too late, especially for grantees who had received funding in the first phases and were nearing completion.

Lessons learned

Several of the lessons identified in this report result from the fund timeframes. The IGM has worked at pace and demonstrated a willingness to pause, reflect and iterate to continuously improve. The volume of applicants processed by the IGM is notable and they have put in place a diverse Central Support Offer to strengthen grantees' delivery. The evaluation has identified the following overarching lessons to inform future funds:

- Consider setting indicative or minimum levels of funding per region to help ensure funding contributes to increasing access to youth facilities across all eligible areas.

- Have pre-construction grants available from the outset to build capacity and capability for the development of applications from organisations across the youth sector, broadening funds beyond those ready and able to apply when the fund was launched.
- Use unambiguous eligibility criteria and detailed programme guidance to enable the most effective use of applicant and IGM staff time and resources.
- Create and communicate a map of the application and grant process outlining what is required at each stage, with indicative timelines to help applicants to plan for and manage their resources, the due diligence process, and grant management.
- Outline and communicate to applicants how applications will be assessed, including the relative importance of environmental sustainability where funds have environmental aims.
- Allocate sufficient resource to providing feedback to applicants against assessment criteria to ensure opportunity for constructive feedback and greater learning to support future applications.
- Given the much-valued role of Relationship Managers, improve processes to ensure effective handover arrangements in instances where Relationship Managers change. Ensure access to technical knowledge, skills and advice for Relationship Managers to enable them to give advice and signpost technical support to grantees.

1 Introduction to the YIF2

1.1 Background and rationale for the YIF2

The effects of the COVID-19 pandemic highlighted the need for positive, shared spaces and activities for young people to support wellbeing, connection with others, and the development of soft skills. Over two thirds of young people (67%) felt that the pandemic would affect their mental health in the long term.¹ Recent figures have shown a rise in young people who are not in education, employment or training (NEET), with 12.6% of 16-24 year olds estimated as NEET between January and March 2024.² Youth services have been shown to help respond to these challenges, as they can provide health and wellbeing benefits for young people,³ as well as supporting the development of skills for life, educational attainment, and employment.⁴

Between 2010 and 2021, there was a 74% reduction in local authority spending on youth services amounting to over £1 billion.⁵ Following this decrease in funding, it is estimated that 1,243 council-run youth centres across England and Wales were closed between 2010 and 2023⁶, and 4,500 youth work jobs were lost.⁷ This has left significant disparities in youth provision across England, with twice as much provision in the most affluent areas, compared to the most deprived.⁸

Phase 1 of the Youth Investment Fund (YIF) was launched in January 2022 by Children in Need on behalf of DCMS and delivered around £12million of small-scale capital projects to fund youth provision. Phase 1 of the YIF was completed in March 2022. Findings from the process evaluation of this Phase were published in February 2023 and demonstrated demand for capital investment in the youth sector.⁹

Following the Department for Culture, Media and Sport's (DCMS) 2021 review of out of school youth provision,¹⁰ DCMS announced a [National Youth Guarantee](#) which aimed to ensure that by 2025, every young person in England would have access to regular youth provision. This included a three-year investment of over £500 million in youth services, including the National Citizens Service, Duke of Edinburgh, and Uniformed Youth Groups, with around £300 million invested through the Youth Investment Fund Phase 2 (YIF2). The YIF2 is targeted to more deprived places and aims to provide more equal access to local, high-quality youth facilities and a broad range of activities to improve outcomes for young people. The investment aligned to the then Government's Levelling Up agenda which aimed to close geographical, social, and economic disparities between places.

¹ Young Minds study, <https://youngminds.org.uk/media/4350/coronavirus-report-winter.pdf>

²

<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/unemployment/bulletins/youngpeoplenotineducationemploymentortrainingneet/may2024>

³ Clarke et al, 2015 & Barry et al, 2017

⁴ <https://www.eif.org.uk/report/social-and-emotional-skills-in-childhood-and-their-long-term-effects-on-adult-life>

⁵ Local Authority S.251 data: 2010/11 and 2020/21 - inflated to 2020/21 prices using the GDP deflators series (March 2022 version)

⁶ <https://www.unison.org.uk/content/uploads/2024/06/youth-services-final-FINAL.pdf>

⁷ <https://www.unison.org.uk/content/uploads/2019/04/Youth-services-report-04-2019.pdf>

⁸ <https://nya.org.uk/national-youth-sector-census/>

⁹ <https://www.gov.uk/government/publications/youth-investment-fund-phase-1-process-evaluation>

¹⁰ <https://www.gov.uk/government/publications/youth-review-summary-findings-and-government-response/youth-review-summary-findings-and-government-response>

1.2 The Youth Investment Fund 2

The YIF2 will be delivered over three financial years from 2022/23 to 2024/25. The fund is split between capital and revenue grant intended help organisations build their capacity and capability to manage a sustainable youth facility and deliver youth activities. The total funds available after the costs of distributing and evaluating the fund was £220 million capital grant and £39.91 million revenue grant. An additional £22.13 million was allocated to fund delivery and evaluation. Any underspend within a financial year had to be returned to HM Treasury.

The YIF2 aims to fund the construction of new or the refurbishment of existing youth facilities that are fit for purpose, with a focus on sustainability, in line with the Government's net zero strategy. Specifically, YIF2 aims to create, expand, and improve up to 300 youth facilities working with young people aged 11-18 or aged up to 25 with special educational needs and/or disabilities. Improving the environmental sustainability of youth facilities through energy efficiencies is intended to reduce ongoing running costs.

Capital projects supported through YIF2 are intended to provide safe spaces for young people in which youth organisations can deliver positive youth activities, increasing the number of young people regularly attending positive activities by 45,000 per year. By engaging more young people and/ or increasing the range of activities available to young people, it is expected that positive outcomes for young people will result, such as improved wellbeing, and increased opportunities to develop skills for life. The Theory of Change for the fund is shown in Section 8.1.

1.3 Overview of the grant-making partnership

Following an open competition held by DCMS, an intermediary grant maker (IGM) was appointed to manage the application and selection process, to distribute grants, and monitor and support successful applicants to deliver their projects. The IGM comprises a consortium led by the Social Investment Business (SIB) and which incorporates the National Youth Agency (NYA), Key Fund and Resonance. SIB hold the Grant Agreement with DCMS and are accountable for the delivery of the fund: organising central payments and making onward grants. The NYA leads the contribution of the IGM to developing the capacity and capability of youth organisations, particularly in relation to delivering high quality youth provision.

Fusion 21, are a social enterprise specialising in public sector procurement, were selected by the IGM as the procurement partner for YIF2. Fusion 21 provided procurement services to grantees with the aim to support them to successfully procure contracts for the delivery of their projects. Fusion 21 aimed to help grantees to maximise the impact of the funding through value for money and to ensure any procurement activity met the governance and legal obligations.

Sharpe Pritchard are a legal firm, specialising in various fields of law, with a particular specialism in public law. Sharpe Pritchard have been retained by the IGM to provide commercial and real estate legal advice to support the execution of the YIF2. The firm has undertaken legal due diligence for each of the YIF grant recipients, ensuring that SIB and its partners adhere to the legal parameters and requirements of DCMS. In addition, Sharpe Pritchard have provided commercial contractual advice to SIB, in its management and support of grantee relationships.

Turner and Townsend, a professional services company specialising in areas such as programme management and cost and commercial management, were brought into the consortium in early 2024 to support grantees on technical construction aspects, and to improve the construction monitoring data available.

SIB, Key Fund and Resonance host Relationship Managers who work directly with successful grant holders. Relationship Managers had an induction programme, and from March 2023, a range of training was available to Relationship Managers which included Coaching Skills Workshops (September 2023), Financial Training (October 2023), and having Challenging Conversations (January 2024). There were regular in-person meetings for Relationship Managers, focusing on the triage of applications and the assessment process.

1.4 Fund eligibility criteria

The YIF2 was open to eligible organisations in 45 upper tier local authorities in England, and organisations in 674 wards in local authorities where deprivation was high, but which are surrounded by less deprived areas, were also eligible to apply. The DCMS selected the eligible areas based on analysis of youth needs and provision of youth services data. For youth needs this included analysis of Income Deprivation Affecting Children Index (IDACI) for 2019 and analysis of data about young people Not in Education, Employment or Training (NEET).¹¹

YIF2 applicants needed to be either a local authority, a registered or exempt charity,¹² a Community Interest Company (CIC) limited by guarantee, or a Community Benefit Society working predominantly with young people aged 11-18, or 11-25 for young people with special educational needs and disabilities.

Fund applicants needed to either be delivering or intending to deliver open access youth activities outside of school hours. There was not an agreed definition of open access youth work recognised and used in the youth sector and by DCMS at the outset of the fund. The IGM created a definition which was used for the fund from January 2023. This was that open access youth provision should include:

- the ability for children and young people to self-refer, apply to join, or in other ways access a provider setting on terms that are designed for them and that do not depend on parent, guardian, or agency referrals,
- be advertised openly to bring in young people who do not know about the service, and
- offer leisure, physical, educational and other activities that have the primary intention of benefitting young people's social welfare, developing their skills for life and work and supporting a healthy and happy transition to adulthood. Activities must be provided by a trusted adult who is able to guide, nurture and challenge young people.

1.5 Application and assessment process

YIF2 opened for applications in August 2022. From June 2023, the main fund was closed to large build applications to ensure that the timescales for completion could be met.

Organisations seeking funding for smaller builds and refurbishment projects were able to apply after this date to the refurbishment fund. Refurbishment grants for projects seeking £150,000 or less which did not

¹¹ <https://www.gov.uk/government/publications/youth-investment-fund-yif-places-selection-methodology/youth-investment-fund-yif-places-selection-methodology>

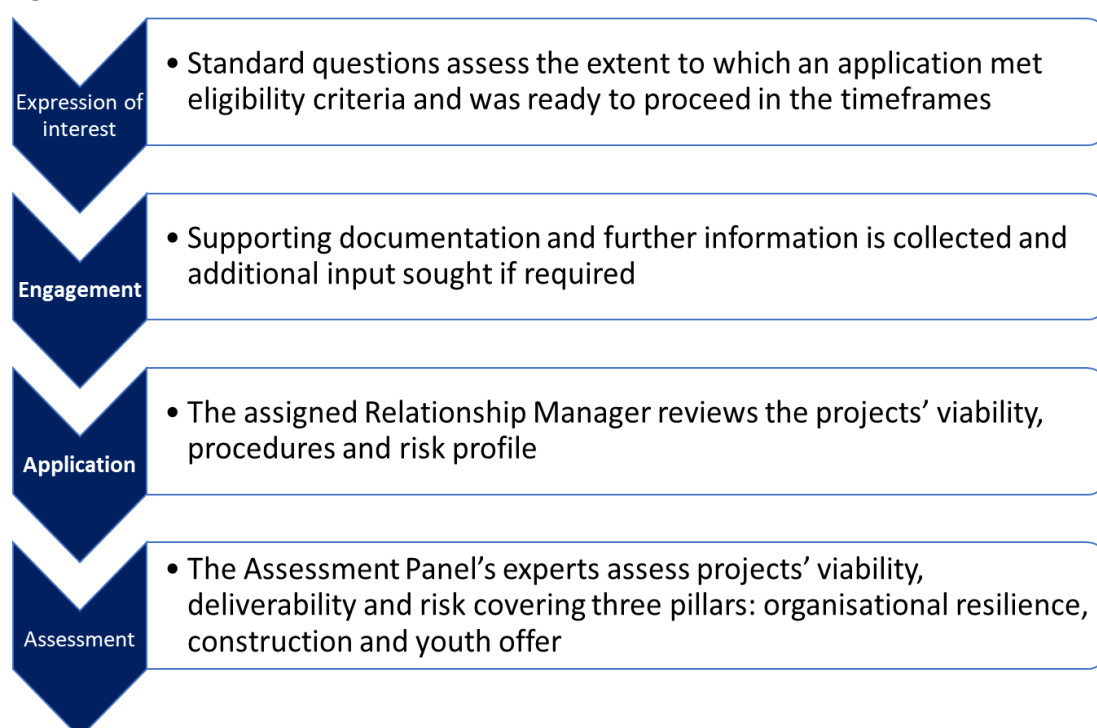
¹² <https://www.gov.uk/government/publications/exempt-charities-cc23/exempt-charities>

require planning permission operated in rounds. Applications were invited during set time periods. Once each application window closed, received applications were sifted for eligibility.

Pre-construction grants of up to £2.5m became available to applicants from January 2023. These provided potential applicants who had limited experience of managing capital grants with financial and construction support to develop bids. Two legal firms were commissioned by the IGM to provide applicants access to construction and legal support. Applicants prior to January 2023 did not have access to this support.

The main stages in the application and assessment process are shown in Figure 1.1.

Figure 1.1 Overview of the YIF2 application and assessment process



1.5.1 The application process

During the application process, Relationship Managers sought further information from applicants. This usually related to aspects related to the organisation, project or youth activities delivered. For example, governance, the youth activities delivered by the applicant and how the capital project would expand their reach and range, and their policies, procedures, and safeguarding.

Relationship Managers reviewed this information together with the EOI and made recommendations to applicants about the level of grant requested, any additional checks required (e.g. in relation to legal review of site ownership) and any grant conditions.

1.5.2 The assessment process

Once deemed ready by a Relationship Manager, applications were reviewed by the Assessment Panel, which was an expert group sitting independently which met monthly. The Assessment Panel had three members and discussed between 20-40 applications at any one Panel meeting. The Assessment Panel reviewed applications against the three fund 'pillars':

- 1) **Organisational resilience** (which included conducting due diligence around the financial health and governance of the organisation)
- 2) **Construction** (the viability of the capital project)
- 3) **Youth offer** (including focus whether and how the youth offer has been informed by young people, participation, and quality of youth practice and whether it is suitably addressing local need).

The NYA were responsible for leading the youth assessment pillar. Each applicants' 'vision' was assessed by NYA's **Young Assessors Panel** to represent the intended beneficiaries and guide the assessment process and ensure bids met young peoples' needs. The Young Assessors Panel were employed to review and score applications. The Young Assessors were a group of 19 young people between the ages of 15 and 24, who were geographically spread and had a diverse range of backgrounds and experiences. They received training and support from the NYA's Youth Participation team. The group met weekly and worked in small groups to review applicants' self-assessments, providing feedback directly on the documents or via email. Their review informed the Assessment Panel.

Based on their collective judgement the Assessment Panel either:

- recommended an application to the Grants Committee;
- recommended an application subject to additional clarification questions being answered;
- deferred applications which were deemed to be insufficiently well-developed; or
- declined applications which were deemed ineligible or not meeting fund priorities.

The **Grants Committee** had formal responsibility for approving the applications recommended to them by the Assessment Panel, alongside fund distribution and oversight. The Grants Committee met quarterly. Trustees from SIB, NYA, and Key Fund attended these committees which took a strategic view about how prospective projects might fit with other funding and existing provision in each area, and any significant risks. More detail was provided to the Grants Committee about the applicants' leadership structures, financial information, staff biographies and the project's value for money, such as the cost per young person. Part way through assessments, the Grants Committee considered the geographical spread of the portfolio with a view to ensuring that funding was allocated to all eligible regions and did not become too concentrated.

1.6 Contracting and grant management

If approved by the Grants Committee, the applicant was informed by letter detailing the maximum grant amount awarded and any special conditions related to the grant. Grants in the Main Fund were required to have development plans. The application then proceeded to due diligence and contracting. If not approved by the Grants Committee applicants were either asked for clarifications or deemed unsuccessful. An overview of the main stages through due diligence and contracting, project delivery and grant management, and project completion is shown in Figure 1.2.

Figure 1.2 Overview of the YIF2 contracting and grant management process

The due diligence process included reviewing the financial position and ensuring that all fraud risk assessments were documented and shared with the DCMS policy team.

Once due diligence was completed, the IGM awarded Grant Agreements which set out the terms and conditions of the grant and confirmed the payment and monitoring schedules. Once the Grant Agreement was signed, the project moved into delivery and grant management was overseen by Relationship Managers. Grant management comprised: dispersing money; monitoring project progress, grantee spending, and governance structures; and providing tailored support to projects to ensure they were sustainable.

Once a grant to the Main Fund was awarded, the NYA worked with the grantee to complete development plans and ensure they had the right support and qualified staff in place to develop and deliver a high-quality youth offer in the facility. As part of their overall management of development plans, NYA had delivered 40 webinars to grantees by June 2024 covering topics such as active participation, safeguarding, risk management, workforce development, engaging young people and qualifications and training of staff. This support strand aimed to help grantees to recruit additional youth workers and manage organisational growth effectively.

All grantees could access support from the Central Support Offer led by the IGM. The Central Support Offer available to grantees provides services and resources to help them deliver their projects and improve the sustainability of their organisation. The support is not mandatory or included within the Grant Agreements and grantees therefore have the flexibility to decide what support (if any) their organisation needs. SIB have delivered webinars about the Central Support Offer and share a monthly newsletter with grantees with information on the support available and how to access this.

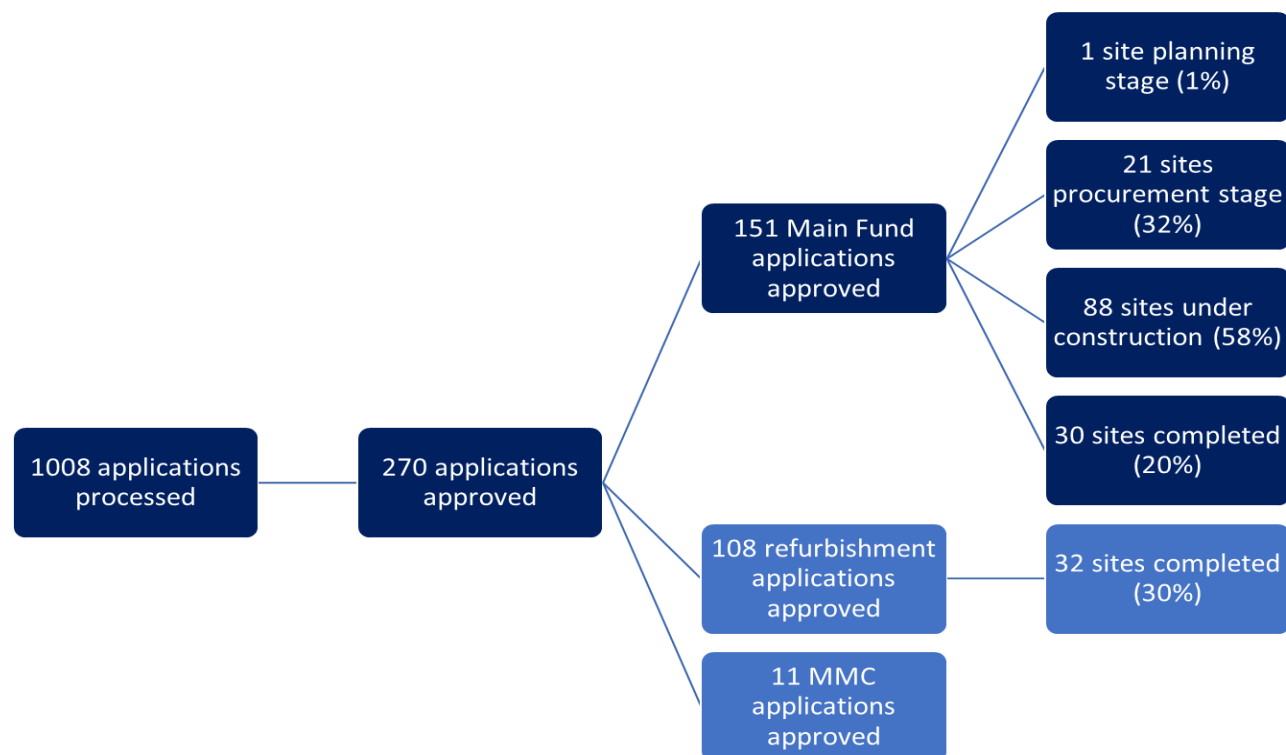
Some aspects of the Central Support Offer are delivered by the IGM partners, and others are contracted to external providers to enable grantees access to specific technical expertise. Support is delivered via

webinars and training sessions with small groups of grantees to allow time for questions and discussion. Central support includes services and resources relating to:

- **Managing the build or refurbishment:** project management, quantity surveying, procurement and contracting and environmental/sustainability advice. This support strand aims to address the shortfall in construction project management capacity and skills amongst grantees, reduce construction risks and ensure projects are environmentally and financially sustainable.
- **Organisational management:** financial management reporting and forecasting, governance including organisational policies. This support strand aims to improve grantees' decision-making processes and increase transparency and accountability.
- **Revenue generation:** income generation, diversification, marketing and social media. This support strand aims to support grantees' financial sustainability and increase their understanding of social media as a tool to support with fundraising and recruitment.
- **Team recruitment and development:** recruitment, workforce development, training and organisational growth.
- **Stakeholder engagement:** central coordination of and engagement with funders and investors. This support aims to promote stakeholder engagement and collaboration between grantees.
- **Peer network:** facilitated grantee cohort meeting and events. This support strand aims to facilitate connections, networking and shared learning between grantees.

1.7 Interim report fund status

The design and implementation of the YIF2 was delivered at pace. Between August 2022 and the end of May 2024, the Fund application and assessment process was designed, operationalised and delivered. The IGM processed over 1,000 applications, of which 270 were approved (42% of eligible applications). There were three application strands: the Main Fund; the Refurbishment Fund; and a fund for Modern Methods of Construction (MMC). By the 1st June 2024, just one approved site in the Main Fund (1%) was at the planning stage, and a third (32%) were in procurement. Fifty-eight per cent of the Main Fund sites were under construction and two in ten Main Fund sites (20%) had completed (Figure 1.3). Overall, around a quarter (24%) of projects across the Main and Refurbishment Funds had completed by June 2024.

Figure 1.3 Overview of project applications and progress, June 2024

Source: Analysis of Programme data, 1st June 2024.

Note: Some applications were for multi-site projects. Modern Methods of Construction (MMC) projects were paused.

2 The evaluation methodology

The evaluation of YIF2 comprises three inter-related strands of work:

1. A **process** strand to understand how the assessment, distribution of funding and implementation of the capital investment programme worked.
2. An **impact** strand to assess the difference YIF2 made to grant holders, staff, and volunteers in youth organisations, and to young people.
3. A **value for money** strand (VfM) to assess the value to the public purse of the funding.

The evaluation is being informed by Young People's Advisory Groups (YPAGs) and a Youth Sector Advisory Panel (YSAP). Further details on the YPAG and YSAP and how they have informed the evaluation can be found in Section 8.4 and Section 8.5.

This chapter sets out the process evaluation aims in scope for this report and provides a summary overview of the methodology. Full details of the methodology are contained in Annex 8.1. The full process evaluation, and findings from the impact and economic evaluation, will be published on completion of fund delivery.

A theory-based approach was taken to the evaluation of the programme. A Theory of Change (ToC) articulated the programme intention and led to the development of evaluation hypotheses (Annex 8.1).

2.1 Overview of evaluation aims and hypotheses

At this interim evaluation point, the process evaluation sought to answer the questions in Box 2.1, and the evaluation hypotheses and assumptions associated with fund promotion, assessment, and grant distribution (Table 2.1). The full list of evaluation questions, the evaluation framework and evaluation hypotheses can be found in Annex 8.6.

Box 2.1: Key questions: Process strand

- a) Which organisations applied for the fund, what funding was given and to whom?
- b) What are stakeholders' views of the fund, it's set up and how it has been delivered?
- c) What factors affected the delivery of the fund?

Table 2.1 Evaluation hypotheses and questions in scope for this report

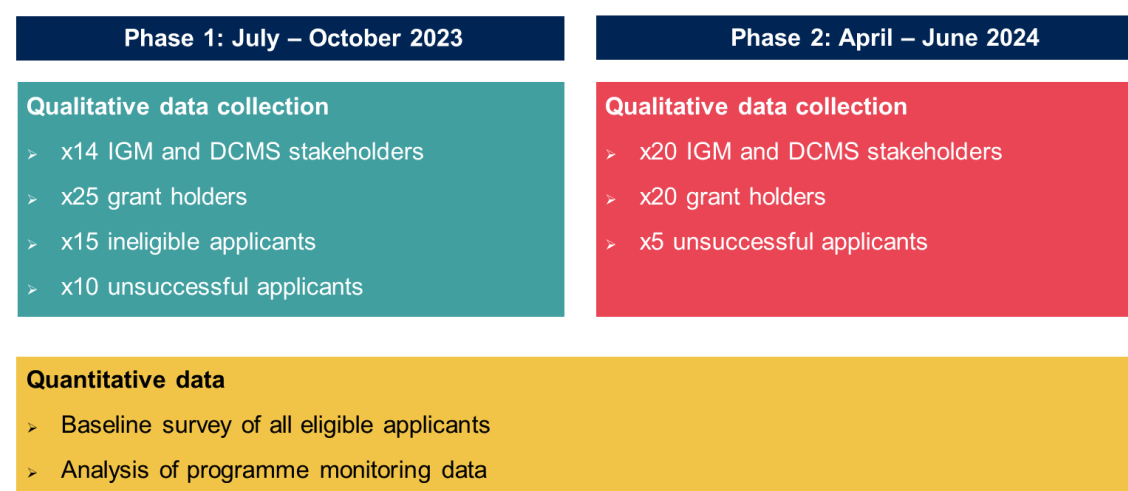
Evaluation hypothesis	ToC component	Evaluation questions
Grant Maker hypothesis 1	Promotion of fund; Support for applicants to develop bids <i>Activity</i> Applications received and success rate <i>Output</i>	- How effective were the processes for promoting YIF2 and engaging eligible organisations? How did applicants find out about YIF2? Section 3.2 - How clear were communications about the eligibility criteria? Section 3.3.2 - Which organisations applied to the fund? Section 3.3.2 - Why did ineligible organisations apply for the Fund? Section 3.3.2 - What was the success rate for eligible applicants? Section 1.7 - What were the enablers / barriers to applying for funding? Section 3.3.4 - How did applicants experience the application process, including the support received from the IGM to develop their bid? Section 3.3.3 - Were any types of organisations (and YIF2 areas) over / under-represented in the applications? Section 3.2.1
Grant Maker hypothesis 2	Assessment of applications <i>Activity</i>	- How effective and timely were the processes for assessing YIF2 applications? Section 3.3.3 - How clear was the eligibility criteria and how consistently was this applied? Section 3.3.2 - How effective were the assessment processes (three pillars)? Section 4.2 - What (if any) modifications were made to these processes and why? Section 4.2 - What were the reasons for rejecting applications, and what types of organisations were rejected? Section 4.5
	Distribution of funding <i>Activity</i> Number/profile of grantees <i>Output</i> Amount and type of funds distributed <i>Output</i>	- How timely and effective were the processes for distributing YIF2 funding? How did these align with project delivery timetables / milestones? What worked well / less well and why in the distribution of funding? What are the lessons? Section 5.4 - How much funding was awarded in total? Section 5.2 - How were funds distributed by factors such as type of grant (pre-construction / capital / revenue), type of org, scale and nature of project, geographical location? Section 5.2 - Were any types of organisations over / under-represented in the grant awards? How did grant awards vary by area/region? Section 5.3
	Grant management <i>Activity</i>	- How effective were the processes for managing grant awards? To what extent did these processes align with the good practice principles and approaches set out in the Government Functional Standard? Section 5.5 - What were the views and experiences of grant holders / wider stakeholders on grant management processes? Section 5.5 - How effective were the systems for monitoring and reporting YIF2 activity / delivery? Section 5.5 - How did grant holders experience the grant management support? What worked well? What could have been improved? Section 5.5, Section 6.3

Evaluation hypothesis	ToC component	Evaluation questions
Grant holder Hypothesis 1	Renovation / refurbishment of existing facilities; Creation of new facilities / provision <i>Activity</i> New facilities renovated / created <i>Output</i>	- How far were YIF2 funded renovations / refurbishments delivered on time, within budget and to specifications? Section 6.2 - What were the reasons for any variations in what was delivered relative to what was planned? Section 6.2 - What were the enablers / barriers to delivery of the new / refurbished facilities? How far were these relating to internal / external factors? Section 6 - How effective was the role of the Relationship Managers / IGM in supporting successful completion of facilities? What worked well / less well and why? What are the lessons? Section 6.3.1
Grant holder Hypothesis 2	Facilities rated at Energy Efficiency B or better <i>Output</i> Facilities are more energy efficient <i>Outcome</i>	- How and in what ways were the new / improved facilities made (more) energy efficient? What worked well / less well in improving the energy efficiency of the new / improved facilities? Were pre-existing facilities more energy efficient than in previous years? Which types of projects / funded facilities were most / least energy efficient and why? What are the lessons? Section 6.4.1 - Did improvements in energy efficiency result in a reduction in the running costs of pre-existing facilities? To what extent did this free up resources for grant holders to use to deliver more activities for young people? How far did it contribute to the improved financial resilience of organisations? Section 6.4.1
Grant holder Hypothesis 3	Grant holders engage with capacity building offer from IGM / other providers <i>Activity</i> Grant holders undertaking training to improve marketing / revenue generation <i>Output</i>	- What capacity building support was offered / delivered through the IGM? How / to what extent was this tailored to the needs of grant holders? Section 6.3.2, Section 6.3.3 - What were the levels of engagement / take up of capacity building support amongst grant holders? What were the enablers / barriers to engagement? What were the views and experiences of grant holders of the support offered / delivered? How relevant was this to their needs? Section 6.3.3 - To what extent did grant holders engage in training to improve marketing and revenue generation? Where did they access this training (e.g. from the IGM/other providers)? What were the enablers / barriers to undertaking this type of training? What were grant holder views and experiences of this? Section 6.3.3

2.2 Overview of methodology

This report draws on data from two phases of qualitative fieldwork, analysis of programme monitoring data, and a survey of eligible applicants- both successful and unsuccessful applicants (Figure 2.2).

Figure 2.2 Overview of evaluation method and data available for this report



2.2.1 Analysis of programme monitoring data

The IGM uses Salesforce software to record baseline and application data. The evaluation team were provided access to this which was available for:

- **Applicants:** covering geographical location, amount of funding requested / awarded, the characteristics of the capital projects, and levels of staffing.
- **Grantees:** project progress towards completion. Engagement with the Central Support Offer as of the end of June 2024.

The programme monitoring data included in this report was collected by the IGM between 1st August 2022 and 1st June 2024. In addition, data about engagement with the Central Support Offer was provided the IGM up to the end of June 2024. The IGM also coded the revenue funding applied for by successful applicants from the documentation submitted by applicants because this was not available in an easy to analyse format within Salesforce. The data was coded against an agreed framework noting the category of revenue funding and amount applied for and provided in excel format for analysis.

2.2.2 Qualitative depth interviews

Qualitative interviews were undertaken with a range of stakeholders over two phases to gather data about the Fund as it progressed. The interviews enabled a detailed exploration of the issues and for questions to be tailored to organisations and individuals' job roles.

Phase 1 took place between July and October 2023. The sample of applicants was deliberative to ensure representation from all regions, varied types of capital projects, and different grant amounts (see Annex 8.2). Applicants were selected from those who had applied to the Fund and received an outcome by June 2023. Phase 1 of the qualitative fieldwork consisted of:

- Four interviews with **staff at DCMS managing the IGM and policy.**

- Ten interviews with **staff from the IGM** and partner organisations. Staff were sampled to represent varied job roles and seniority.
- Fifteen interviews with **ineligible applicants** to gather feedback on the application process and fund promotion activities. The sample covered the range of reasons recorded in the programme data for ineligibility.
- Ten interviews with **unsuccessful applicants** to gather feedback on the application and selection process. Sampling ensured diversity based on the reason recorded in the programme data for being unsuccessful.
- Twenty-five interviews with **grant holders**. The sample sought to ensure diversity in terms of region, legal type, and different levels and types of funded projects.

In phase 2, in-depth qualitative interviews were undertaken between April and June 2024. As with phase 1, interviewees were purposively sampled to ensure a good spread across the sampling criteria within the sampling strategy (Annex 8.2). Phase 2 qualitative fieldwork consisted of:

- Three interviews with policy and project management staff at **DCMS** working on YIF2.
- Seventeen interviews with **staff from the IGM and partner organisations**, including a mix in terms of staff from operational and senior roles and working on different areas of YIF2. This included Relationship Managers and representatives from the Assessment Panel and Central Support Offer team.
- Five interviews with **unsuccessful applicants** to explore their experiences of the application process and gather evidence on whether this had changed since phase 1 data collection.
- Twenty interviews with **grant holders**, including five who were previously interviewed at phase 1 and a mix in terms of project size/type, type of organisation, region where the grantee was based and size of the capital and revenue grants.

Interviews with ineligible organisations were not included in phase 2, due to the saturation of themes collected at phase 1.

To conduct the analysis of the qualitative data, comprehensive analysis frameworks were developed in Excel across each category of interviewee. The analysis frameworks were populated with the data collected from interviewers notes of in-depth interviews. The evaluation team conducted thematic analysis of this data, drawing out key patterns, themes and findings relevant to each of the overarching process evaluation questions. The analysis considered patterns in responses across stakeholder types described above, and outlines in Table 8.3, exploring whether perceptions or experiences of YIF2 differed across interviewees.

2.2.3 Baseline survey of applicants

All successful and unsuccessful applicants to the fund were contacted by email and invited to take part in an online survey. The first cohort whose applications had been assessed by June 2023 were invited to take part in August 2023, followed by a second cohort in January 2024, who had been assessed by December 2023. The survey was tested for comprehension and flow prior to cohort 1 invitations with five grantees from a range of organisations who volunteered to review this. The survey covered feedback on

the application, assessment, and grant award processes. It also collecting outcome measures identified in the fund level ToC, alongside organisational characteristics such as turnover, main sources of funding / income, operating costs, opening hours, services available onsite, facilities, and numbers of staff and volunteers.

Applicants were issued an email invitation with a unique link to the survey. In cohort 1, two email reminders and some follow-up reminder phone calls encouraging applicants to complete the online survey were undertaken to help maximise the response rate. In cohort 2, if applicants did not complete online following multiple reminders, they were able to complete the full survey over the telephone when called. Unsuccessful applicants from cohort 1 were offered an incentive of £40 to complete the survey, with this going to their own organisation or a charity of their choice. For cohort 2, the incentive for unsuccessful applicants was increased to £75 to try and increase the response rate.

The survey took an average of 15-20 minutes to complete, it contained mainly closed questions with two open ended questions.

There were **392** completed responses to the survey (Table 2.4), with a response rate of 70% from successful applicants and 49% from unsuccessful applicants.

Table 2.4 Applicant survey: completed responses

	Issued sample	Achieved responses	Response rate
Successful applicants (Aug 2022-Dec 2023)	259	182	70%
Unsuccessful applicants (Aug 2022- Dec 2023)	430	210	49%

The survey data presented in this report are weighted to grant amount requested for unsuccessful applicants and grant amount received for successful applicants. Due to the incomplete nature of relevant fields in the monitoring information, no other variables were used so that all survey respondents could be included in the weighting. However, additional analysis found that applicants completing the survey were comparable to the whole sample in most observed characteristics. This implies that survey respondents can be assumed to be representative of the sample of applicant organisations for practical purposes. Annex Section 8.3 contains further details of the weighting method.

Where data are presented as percentages in charts and tables, they may not sum to 100 per cent due to rounding.

2.2.4 Young Person's Advisory Groups (YPAG)

Young People's Advisory Groups (YPAGs) have been convened to inform and support the evaluation. Grantees were invited to express interest in holding a YPAG should they feel able. Three YPAGs had been held by the time of this report. The first YPAG met in September 2023, to provide feedback on the Theory of Change (ToC) for YIF2. The second YPAG met in October 2023 to provide feedback on key evaluation tools to be used in the evaluation, particularly those targeted at young people. The third YPAG was held in March 2024 to feedback on the draft survey for young people.

2.2.5 Youth Sector Advisory Panel (YSAP)

A Youth Sector Advisory Panel was convened to support and advise the evaluation. Nine grantees applied and were appointed to be part of the YSAP. The YSAP met for the first time in October 2023 and discussed the George Williams College offer of capacity-building support, the draft survey of young people and the draft letter for parents and carers planned to accompany the survey of young people. In February 2024, the YSAP met again to discuss reflections on the first interim report findings and how these could best be shared with grantees and unsuccessful applicants more widely, updates to the Theory of Change (ToC) and how the evaluation team should approach offering online courses as part of the capacity building offer to ensure equitability in access to these.

2.3 Strengths and limitations of the approach

The high degree of responsiveness to requests for qualitative interviews has been a particular strength of the evaluation. A range of stakeholders were interviewed, and views collated.

A high proportion of applicants responded to the survey, particularly those who were successful in their application for funding. 70% of successful applicants who received an invitation went on to complete the survey, partly because it was reinforced that taking part was a condition of their Grant Agreement. Incentives were offered to unsuccessful applicants and 49% of those invited went on to complete the survey in full. The overall response rate to the applicant survey was 57%, meaning that over half of those invited to complete it responded, providing confidence in the reliability of the data gathered.

The weighting used for the applicant survey is somewhat limited in that applicants were only weighted to a single variable. Successful applicants were weighted to the grant amount received and unsuccessful applicants to the grant amount requested. This was due to many other potential variables being blank or incomplete for both types of applicants because the IGM had sought to minimise the data collected and therefore time and resource burden for applicants during the expression of interest phase. Ideally, the weighting would have included variables like organisation legal form and number of staff / volunteers, but this data was incomplete or unreliable and so could not be used.

A final consideration is that the programme data used for this report represents a snapshot in time. The data presented in this report was drawn at on 1st June 2024.

3 Findings: Fund promotion and application

Chapter summary

- The fund was successfully promoted through a range of channels and received over 1,000 applications, totalling over one billion pounds (more than three times the amount of funding available). Applicants welcomed YIF2 and expressed that it was the first capital investment opportunity for the youth sector in many years.
- Significantly fewer applicants in the Northeast had heard about the Fund via a local authority than in the Northwest (7% compared to 28%) suggesting that some local authorities were more proactive at disseminating the opportunity than others.
- Over a third of applications (37%) were recorded as ineligible in the programme data typically at the first stage of the assessment process. The geographic eligibility criteria were well understood. However, there was uncertainty about the open access youth work criteria. Having a concise definition of open access youth work from the outset of the fund would have been helpful.
- There was some variation in when during the application process projects needed planning permission. Expectations about planning permission could have been more clearly communicated to applicants. As planning permission determined success in some cases, therefore applicants viewed it as an eligibility criteria. This contributed to a sense of confusion amongst some around whether their applications were ineligible or unsuccessful.
- Applicants who received support from a Relationship Manager during the application process found it helpful (86%). Applicants described a collaborative process in which their Relationship Manager suggested they reconsider aspects of their application to improve it.
- Applicants who did not have a consistent or strong relationship with a Relationship Manager said that it was difficult to feel sure that the best representation of their project had been submitted on their behalf.
- Applicants' experiences of applying to the fund were influenced by their prior experience in applying to large capital funds and the level of resource and capacity they had available to work on a sizeable bid. Applicants without prior experience frequently underestimated the time and costs associated with applying. Applicants said that a clear roadmap outlining the grant making milestones and stages would have been useful. Without this, applicants felt it was difficult to understand progress and plan accordingly.

3.1 Introduction

This chapter outlines applicant and Intermediary Grant Maker (IGM) staff experiences and views of the promotion, application, and assessment processes of the YIF2. The timescales meant that the fund was designed and implemented at considerable pace, and the findings should be viewed in this context. This chapter sets out how the fund was promoted, and applicant awareness and motivations for applying. It then considers experiences of the application process, including applicants' understanding of the eligibility criteria and factors which may have enabled certain organisations to apply to the fund, or acted as barriers for others.

3.2 Promotion of the Youth Investment Fund (YIF) 2

The application period for YIF2 launched in August 2022 and by the time it closed in September 2024 there had been 1,008 applications. Of these, 270 (27%) had been approved by the IGM. Over 350 applications were unsuccessful (36%), and a further 371 (37%) were deemed ineligible (Table 3.1).

Table 3.1 Application Status

Status	Number of applications	Percentage of applications
Approved	270	27%
Unsuccessful (eligible)	359	36%
Ineligible	371	37%
Panel Review	4	0%
Withdrawn by applicants	4	0%
Total	1008	100%

Source: Analysis of YIF2 Programme data 1st June 2024

3.2.1 Marketing and promotion of the fund

In September 2019, it was announced as a Conservative party manifesto commitment that £500 million government funding would be made available to build new youth centres and refurbish existing centres. This raised an expectation across the youth sector that investment would be made available. Interviews with applicants suggest that organisations working in the youth sector, particularly local authorities, and uniformed youth group head offices, had anticipated YIF2 for a while before it opened for applications.

Once the YIF2 was announced, but prior to the appointment of an IGM, DCMS staff approached eligible local authorities to raise awareness of the fund and prepare them for the application process. These discussions were caveated with the fact that DCMS were not sure of the final eligibility criteria or application process at that time. This early engagement was said by DCMS staff to be driven by the requirement to spend the funding by the end of March 2025. The department sought to prepare organisations, even though there was minimal detail. Interviews with applicants from local authorities suggested that, while they were grateful for the forewarning, it was difficult to meaningfully prepare without clear eligibility criteria. This early engagement by DCMS with the sector therefore raised awareness of the fund but did not give more time for organisations to significantly prepare.

Following the appointment of the IGM in August 2022, the IGM worked proactively to promote the fund. Interviewees from the IGM described reaching out to contacts and youth providers with whom they had existing relationships, encouraging them to spread awareness of the fund within their networks. Alongside this, they used their social media channels and existing newsletter communications to promote the fund. DCMS also promoted the fund through their communications and social media channels. While DCMS and IGM staff thought it was challenging to know if they had successfully reached all eligible organisations, they used all promotion channels available, and generated a high volume of applications to the fund.

Following the announcement of the first funded projects in May 2023, the IGM incorporated 'success stories' into their promotion of the fund on their website and in external facing communications. The IGM used examples of funded projects to highlight what the YIF2 could be used for. Interviewees from the

IGM said that these examples, alongside the promotion of funded projects by grantees themselves, were successful in attracting potential applicants.

An embargo on discussing successful projects in public prior to this point to align with Ministerial announcements, frustrated IGM staff because they could not use these examples to promote the fund as early as they would have liked. Staff at the IGM described an increase in applications following the announcement of the first round of grantees which they felt could have happened earlier, giving applicants more time to prepare, had the public announcement been allowed earlier.

While there was regional diversity among the applications, a quarter of eligible applications came from organisations in the Northwest region (23%) (Table 3.2). Reasons for this are explored in Section 5.3.

Table 3.2 Total eligible applications, by region

Region	Total eligible applications	Proportion of eligible applications
East Midlands	46	7%
East of England	43	7%
London	18	3%
North East	94	15%
North West	144	23%
South East	91	15%
South West	52	8%
West Midlands	58	9%
Yorkshire and Humber	77	12%
Total	623	100%

Source: Analysis of YIF2 Programme data 1st June 2024

3.2.2 Applicant awareness of the fund

The approach to raising awareness of the fund by the IGM and DCMS used a variety of channels. The most common sources for respondents to the application survey to have heard about the fund were via another youth organisation (18%), the local authority (17%), or the national headquarters for their organisation (16%) (Table 3.3). The variety of sources via which applicants had heard about the fund is testament to the success of the DCMS and IGM in promoting the fund. Significantly fewer applicants in the North East had heard about the Fund via a local authority than in the North West (7% compared to 28%) suggesting that some local authorities were more proactive at disseminating the opportunity.

The depth interviews reflect the diversity of channels shown in Table 3.3 through which applicants heard about the fund. For example, organisations that had engaged with YIF1 were aware of the fund and automatically received DCMS communications about the YIF2. There were respondents with prior relationships with IGM partners who were told about the fund directly and suggested examples of suitable projects. Interviewees who were working with IGM partners on other projects said they had been directed towards the fund to seek further funding for the projects on the basis that they were likely to be eligible. Some applicants described becoming aware of the fund through seeing it promoted in Voluntary Organisation Network emails they subscribed to, or emails that summarised funding available within the

youth sector. Others saw it on online in forums that brought together youth focused organisations. Finally, some applicants learned of the fund from following their organisation's group, DCMS, or IGM partner organisations on social media channels. This included LinkedIn, X (Twitter), and Facebook.

Table 3.3 How did you hear about YIF2?

Source	Percentage
Another youth organisation	18%
Local authority	17%
National headquarters for your organisation	16%
Local Council for Voluntary Service, or other local organisations	14%
In national or local media, including social media	11%
Communications from the National Youth Agency, Resonance or Key Fund	10%
Communications from the Department for Culture, Media, and Sport (DCMS)	10%
A Social Investment Business (SIB) employee	9%
Government website	8%
Communications from Social Investment Business (SIB)	6%
Other	20%
Not sure / don't remember	1%

Source: Applicant survey, AWARENESS, weighted data, all applicants, N=389

3.2.3 Motivations for applying

Applicants welcomed YIF2 and expressed that it was the first capital investment opportunity for the youth sector in many years. Applicants were asked in the survey what motivated them to apply to the fund (Table 3.4). Motivational differences between organisations when applying to the fund will be important to consider when undertaking the impact evaluation and interpreting the expected and realised outcomes for young people.

The most common motivation for applying (referenced by 74% of applicants) was an opportunity to **upgrade, refurbish or modernise existing facilities**. Interviewees frequently described a lack of existing specialist facilities for young people in their area, and inappropriate or rundown buildings. For instance, one applicant hosted activities in temporary cabins without toilet facilities at the point of application, whilst others described facilities with leaking roofs and broken windows.

The second most cited motivation by applicants was to deliver **more activities for young people** (67%). These applicants wanted to create bigger spaces to provide more activities such as music rooms, or outside space, or to modernise facilities to better cater to the needs and interests of young people. Applicants said that young people using their services had expressed an interest in facilities which could cater to interests like virtual reality gaming, making podcasts, or filming social media content.

Applicants were also motivated by reaching a **wider group** of young people (56%), or to improve the **quality** of existing provision (53%). New-builds (76%) and renovation projects (73%) were significantly

more likely to be motivated to apply to the fund by wanting to **deliver more activities** for young people than refurbishment projects (57%)¹³.

Nearly half (47%) of applicants applied to increase the **accessibility of facilities**. These applicants said their existing facilities did not meet modern accessibility standards and that the works would include modifications such as wider doors and push button access to make their activities accessible to wheelchair users.

It is notable that 27% of applicants applied to **help reduce their running costs**. This is a key outcome for the fund but was not a key motivator for applicants. Applicants applying for this reason reported that increased energy costs in the year prior to the launch of the fund had increased the cost of running their buildings. Consequently, improvements to insulation and more general moves to improve energy efficiency were part of applications.

Table 3.4 Why did you apply for YIF2?

Motivation	Percentage
An opportunity to upgrade / refurbish / modernise your existing facilities	74%
To deliver more activities for young people	67%
To reach a wider group of young people	56%
To improve the quality of existing provision	53%
There is a lack of youth provision in our area	49%
To deliver different types of activities for young people	48%
To make our existing facilities more accessible	47%
To create a new facility for use by the local community	39%
To make our existing facilities more sustainable	37%
To allow more organisations to provide youth services within the facility	37%
To help reduce our running costs	27%
Other	5%

Source: Applicant survey, WHYAPPLIED, weighted data, all applicants, N=389

3.3 The application process

One thousand and eight applications to the fund were received. In total, over one billion pounds (£1,060,190,718) was requested from the fund. This was three times more than the total fund value of £342 million, indicating the strength of demand for capital investment from the youth sector.

¹³ When the fund first opened capital project type was self-selected by the applicant. Once the refurbishment application form was launched, refurbishments were defined as projects valued at up to £150,000 capital, not requiring planning permission and a refurbishment on an existing building. Renovation projects are those in the main fund that are not new builds.

Table 3.5 shows the grant size requested by applicants, incorporating both capital and revenue funding. The median grant amount requested was £350,000. Around one in every eight applications (13%) requested more than £2 million, but most applications (44%) were for grants of up to £250,000.

Table 3.5 Total Grant Size Requested

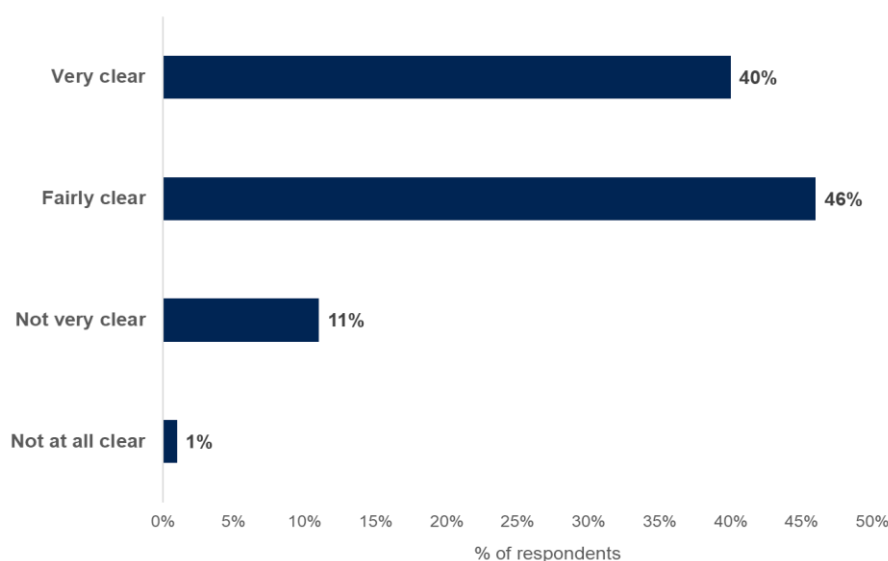
Total Grant Size Requested	Number of applicants	%
£0 - £250,000	448	44
£250,001 – £500,000	155	15
£500,001 – £1,000,000	146	14
£1,000,001 – £2,000,000	132	13
£2,000,001 – £3,000,000	39	4
£3,000,001 – £4,000,000	26	3
£4,000,001 – £5,000,000	11	1
More than £5,000,000	51	5
Total	1,008	100

Source: Analysis of YIF2 Programme data 1st June 2024

3.3.1 Clarity of aims and objectives

When asked in the applicant survey how clear they found the application guidance on the website about the aims and objectives of the YIF2, a large majority of applicants (86%) agreed that the aims and objectives were clear. Around 1 in 10 (11%) thought they were unclear (Figure 3.6). Successful applicants (93%) were significantly more likely than unsuccessful applicants (79%) to say the application guidance about aims and objectives was clear.

Figure 3.6 How clear was the application guidance on the website about the aims and objectives of the Youth Investment Fund Phase 2?



Source: Applicant survey, APPLICATION_CLARITY, weighted data, all applicants, N=389

3.3.2 Eligibility criteria

As noted in Chapter 1, YIF2 had three eligibility criteria relating to geography, organisation type, and open access youth work. However, over one third of all applications to the fund (37%) were recorded as ineligible. For context, the equivalent figure for YIF1 was 10% of applications being ineligible.¹⁴ Table 3.7 shows recorded programme data on the reasons for application ineligibility.

In qualitative interviews, successful applicants felt the eligibility criteria were clear and straightforward. Applicants who felt they had a good understanding of the eligibility criteria described having checked the IGM website and finding tools to check eligibility. These included a tool to check if the postcode of their proposed site was in an eligible ward, and a checklist of key requirements. Applicants with this experience typically entered an application which was eligible, even if they did not receive a grant.

Other applicants described being confident that they were eligible because of advice they received from an organisation they trusted to understand the criteria. Examples of such organisations included charities who were advised by local authorities to apply, uniformed youth groups who were encouraged to apply by their national overarching body, and organisations with relationships with IGM partners that were encouraged to apply. In some instances, organisations that were unclear on the eligibility criteria actively sought advice from their local authority or went directly to DCMS or the IGM for clarification.

Table 3.7 Reason for application being ineligible for YIF2

Reason for ineligibility	Number of ineligible applicants	%
Ineligible - Feasibility/Timescale	139	37
Ineligible - Purpose of Investment	47	13
Ineligible - Location	33	9
Ineligible - Financial Resilience	31	8
Ineligible - Not Open Access	30	8
Ineligible - Other	24	6
Ineligible - Ownership/Lease Issues	24	6
Ineligible - Use of Proceeds	17	5
Ineligible - Legal Status	8	2
Insufficient Evidence - Impact of delivery on group served	7	2
Ineligible - Amount Requested	3	1
Ineligible - Organisational Governance	3	1

¹⁴ https://assets.publishing.service.gov.uk/media/63e4d6f38fa8f505133b426a/YIF_Phase_1_Process_Evaluation_Final_Report_acc.pdf

Ineligible - Not Trading/Operating long enough	1	0
Total	371	100

Source: Analysis of YIF2 Programme data 1st June, 2024, Applications with reason for ineligibility marked, N=371

There was confusion about eligibility criteria among unsuccessful applicants interviewed. Having a concise definition of open access youth work and how it would be applied to applications from the outset of the fund would have reduced the number of applications that were ineligible due to not delivering open access youth work (8%). Some applicants who were told they were ineligible due to not offering open access youth work felt that their services did meet this criterion. This was particularly true of interviewees providing sports activities. In some instances, this was related to the need for self-purchased sports equipment, or for the need to register with relevant sports organisations to be able to participate. The IGM made a definition of open access youth work available on the application website as the beginning of 2023, six months into the application window. This update led some applicants to believe that the goalposts of the criteria kept changing.

It was common for unsuccessful applicants to conflate success criteria with fund eligibility criteria. All projects needed to complete by March 2025, and this led to variation in when during the application process projects needed to evidence planning permission (in cases where this was required). As applications progressed, there became a critical time point at which planning permission was required for the project to remain feasible within the fund timeframe, which varied project-by-project.

Applicants often assumed that planning permission had been an eligibility criterion for the fund, which they perceived they had not been forewarned about. This was a source of frustration for some unsuccessful applicants, who did not feel this was fair and it contributed to a sense of confusion amongst some about whether their applications were ineligible or unsuccessful. It would have been helpful for the IGM to better communicate to applicants any cut off points for applications of specific scales to have planning permission. Due to this lack of clarity, some interviewees who were told their application was ineligible maintained their eligibility for the fund and felt that the IGM had judged their application unfairly.

"I was really upset [about being informed they were ineligible], firstly because, I don't remember seeing anything in the criteria about type of building... Also, the council had checked our application and said we were eligible."

Unsuccessful applicant

This confusion can also be seen in the programme data collected relating to eligibility (Table 3.7), where recorded reasons for applicant ineligibility include categories that were not part of the published fund eligibility criteria, such as relating to the timescales. Clearer ways of recording ineligible applications, based on the fund eligibility criteria, and distinguishing them from reasons for applications being unsuccessful would have improved the quality of programme data.

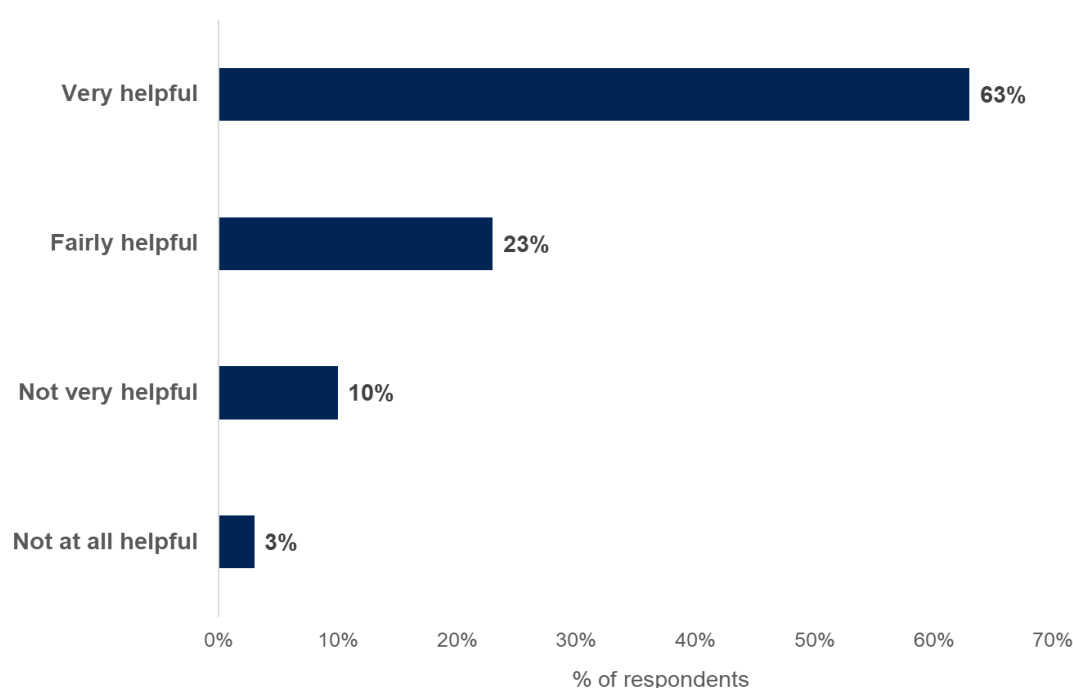
3.3.3 Applicant experiences

As outlined in Chapter 1, the application process involved an online EOI form, followed by tailored support from the IGM to develop an application. It is important to note that interviewees were unclear about the stages of the application process and were not always able to distinguish between them during interviews, therefore some caution should be undertaken when interpreting findings about specific aspects of the application process. Some applicants interpreted the EOI as the application, due to their main engagement happening at this stage.

Whether applicants interacted with IGM staff at the EOI stage varied. Some interviewees had access to advice from the IGM through existing connections, but others found their requests to the IGM for clarification around the level of information required at the EOI stage were not answered.

Applicants that progressed from the EOI stage to a full application were assigned a Relationship Manager to support their application. The support from Relationship Managers was positively received by applicants in this group. Survey data from applicants who received support from a Relationship Manager during the application process shows that most found it to be helpful (86%), with almost two thirds reporting that it was 'very helpful' (63%). Applicants were significantly more likely to view support from their Relationship Manager as 'very helpful' (81%) if their application had been successful. Thirteen percent of applicants who received support from a Relationship Manager described their support as 'not very helpful' or 'not at all helpful' (Figure 3.8).

Figure 3.8 How helpful, if at all, was the support from a Relationship Manager during the application process



Source: Applicant survey, RM_HELPFULNESS, weighted data, all who received RM support excl. don't know, N=195

Interviewees with a positive experience of working with a Relationship Manager described them as a useful source of information about what a successful application would consist of, and key to understanding the assessment panel's requirements.

“Throughout the first phase [bid development] we were allocated a manager. They worked with us to full application, take it to panel. They really did help us get it over, they asked for missing information, asked for clarity, everything that the panel was looking for, they were our panel eyes. They also put us in touch with a construction company, who provided us with technical support on the construction side.”

Grantee

Applicants described a collaborative process in which their Relationship Manager suggested they reconsider or redesign aspects of their application to increase their chances of success. There were

examples of applicants being encouraged to apply for additional revenue funding by their Relationship Manager.

"[The relationship manager was] brilliant... It was not like your usual application...They were like having critical friends...steering us in the right direction... they would send us different documents to complete. They would clarify things...Also what to include. Any questions they would answer or get back to you on it."

Grantee

Applicants who did not have a consistent or strong relationship with their Relationship Manager said that it was difficult to feel sure that the best representation of their project had been submitted on their behalf. Interviewees with a poor experience of the application process said that it was not always clear what the Relationship Manager needed from them and when. For instance, one applicant expressed frustration when seeking clarification on whether a business plan or a proposal was required, to be told "*whatever works for you*". Another described a negative experience where they felt the Relationship Manager prioritised other applicants that were thought to have better chances of being successful, although this was how Relationship Managers were intended to manage caseloads. The applicant experienced slow responses to queries and felt they had to put more work into the bid because of a perceived lack of Relationship Manager support.

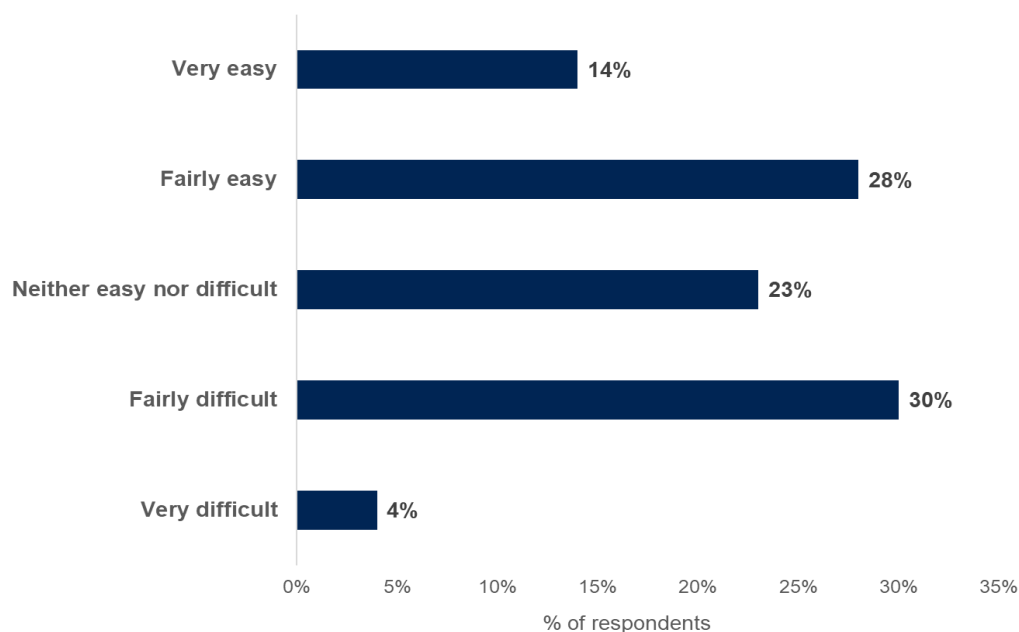
Some applicants were unsure who their Relationship Manager was due to staff turnover. Some applicants described having up to four Relationship Managers during the application process. While some turnover of staff is inevitable during a busy set-up phase, the handover of applicants between Relationship Managers could have been more consistent and structured.

"I would just provide them information when they needed it. You never really knew when it finished, which was quite stressful. You always questioned, have I really completed this? Then you would have another new Relationship Manager and they would ask for something else..."

Grantee

3.3.4 Enablers and barriers to applying for the fund

The survey of applicants asked how easy or difficult they found the application process. The response was split between difficult and easy, with a slightly higher proportion of applicants reporting they found the application difficult (42%) compared to the proportion who found it easy (34%). At the most extreme ends of the scale, only 4% found it 'very easy' whilst 14% found it 'very difficult'. Just under a quarter (23%) were somewhere in-between, finding the process neither easy nor difficult (Figure 3.9).

Figure 3.9 How easy or difficult was the grant application process overall?

Source: Applicant survey, APPLICATION_EASE, weighted data, all applicants, N=389

There were significant differences between successful and unsuccessful applicants in how easy or difficult they found the application process. Thirty-nine per cent of successful applicants found the application process easy, compared to 31% of unsuccessful applicants. Nearly half (47%) of unsuccessful applicants found the application process to be difficult compared with 37% of successful applicants. Moreover, 19% of unsuccessful applicants found the process very difficult, significantly more than the 8% of successful applicants who reported it being very difficult.

Interviews with applicants identified a series of enablers and barriers that explained perceptions of how easy or difficult they found the application process. Some related to the characteristics of the applicant, and others to the application process. Application experience was influenced by applicants':

- **Prior experience** of applying to large capital funds. Organisations with prior experience or resource to support applications, which included local authorities or uniformed youth groups, were able to draw upon this to help inform their estimations of the level of detail and time required to fulfil the requirements. Those without prior experience sometimes underestimated the time it would take for factors like planning permission to be granted, or the cost of architect's drawings.
- **Skills and capabilities** compared to the requirements of the application. Applicants expected the application process to be rigorous due to the size of the grant and it being public money. However, some of the application requirements were described as complex, such as the request for Royal Institute of British Architects (RIBA) standard quotes, which could be a fixed fee, percentage of construction costs, or time charged. This sometimes led to a back-and-forth between applicants, their relationship managers, and architects. Some applicants felt that the requests were inappropriate or burdensome for their organisations, such as specific HR policies and future requirements. This was particularly expressed by smaller or volunteer-led organisations. YIF2 requirements were perceived by some to be tailored towards larger organisations with larger turnovers.

- **Capacity** across all forms of organisation, the ability to effectively ‘clear the decks’ to submit their application on time was an important enabling factor. Interviewees who were able to clear a week or two in their schedule to complete the application, or where staff or volunteers worked on it over the weekend, reported that they would not have been able to apply otherwise.
- **Project readiness** was a key enabler for being able to submit the information required on the EOI. Some applicants said they had not been prepared for the level of detail that would be required of them at this stage, particularly about construction planning. Applicants with a high level of project readiness described being encouraged by their Relationship Managers to apply for more funding, as they were in a strong position to receive a grant.

Applicant experience was influenced by how applicant’s perceived aspects of the process:

- **A perceived lack of clarity about the application process**, such as how much could be applied for and how the process would unfold. For example, some interviewees were told projects would not be assigned on a first-come basis but later found their bids were unsuccessful due to funding being exhausted. Applicants said a clear roadmap outlining the grant making milestones and stages would have been useful. Without this, applicants felt it was difficult to understand progress and plan accordingly.
- **Programme guidance on what the revenue funding could be used for** and how it might support the capital investment could have been clearer to applicants. Grantees felt that if they had better understood what revenue money could fund, they would have requested more. It seems there were different experiences of the advice and guidance given by Relationship Managements to applicants during the application development process, particularly about the amount to apply for and distribution between capital and revenue costs.

“In hindsight, I would have put more in for the revenue funding to include more staff members. I’m probably £100,000 short of where I need to be over a two-year period on that, but it wasn’t made clear at that time what we could do with it.”

Grantee

- **The EOI.** There were practical challenges experienced whilst completing the EOI. For instance, some applicants felt that to confirm contractor availability before receiving funding confirmation was a difficult ask, as contractors would be hesitant to commit without guaranteed funding. Organisations without an existing open access youth offer found it challenging to make estimates of how many young people would attend the provision. Some applicants criticised the word count limit expressing it to be insufficient to adequately convey project details. With this, there was a reduced confidence in how they felt decisions at the assessment panel could be made based on limited information.

“For a start the EOI was ... relatively straightforward ... they asked for light touch detail, there was a word count, there was not enough space to write about the project. How can they make decisions on that, if part of the assessment process, ... they need to give you more space to write about the project.”

Grantee

- **The support and encouragement from relationship managers** during the application process. Half of the applicants who responded to the survey received support from a Relationship Manager (50%), but this varied between successful (70%) and unsuccessful (34%) applicants. Around three in ten (29%) had received advice about applying for revenue funding and 18%

received support with how much to bid for. However, more than one in every three (36%) applicants reported they did not receive any support from the IGM when developing their bid. This will reflect the fact that some applicants completing the survey will not have progressed beyond the EOI stage and therefore were not assigned a Relationship Manager.

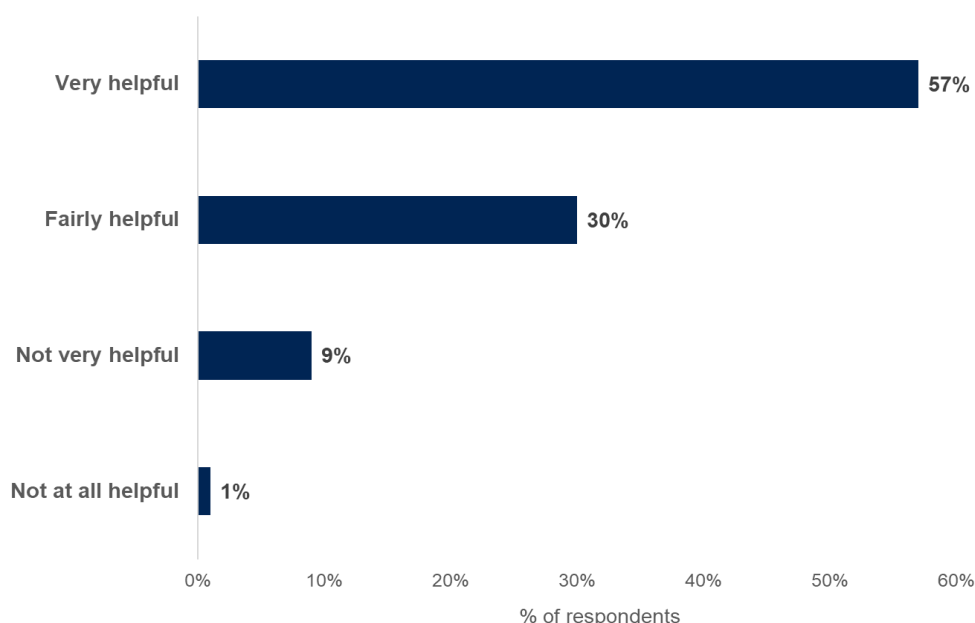
Table 3.10 What support, if any, did you receive from the grant maker (Social Investment Business (SIB) and/or partners) when you were applying for Youth Investment Fund Phase 2?

Support	All	Successful	Unsuccessful
I received support from a Relationship Manager, for example to improve my application	50%	70%	34%
I received advice about applying for revenue funding	29%	48%	12%
I received support and advice with how much to bid for	18%	30%	8%
I received financial support with a pre-construction grant from SIB to help make an application	11%	18%	4%
I received support on accessing modular construction	4%	7%	2%
I received support with building plans or gaining planning permission	3%	4%	3%
Other support	5%	4%	5%
I did not receive support from the intermediary grant maker when developing our bid	36%	17%	53%
Not sure / don't remember	4%	4%	3%

Source: Applicant survey, IGM_SUPPORT, weighted data, all applicants, N=389 (successful = 182, unsuccessful = 207).

- **The support from the grant maker.** Nearly four in ten respondents to the applicant survey (38%) said they received support from the grant maker whilst making an application. The majority receiving grant maker support found it to be helpful (87%) (Figure 3.11).

Figure 3.11 How helpful, if at all, was the support you received from the grant maker (SIB and/or partners) whilst making your application?



Source: Applicant survey, SIB_HELPFULNESS, weighted data, applicants who received grant maker support, N=147

4 Findings: Assessment and contracting

Chapter summary

- The Assessment Panel and Grants Committee process was seen by stakeholders as an effective and streamlined way to assess and approve the applications, particularly in the context of the volume of applications to the fund.
- The Assessment Panel met monthly during the grant application and assessment period to review applications against the three fund 'pillars' of organisational resilience, construction, and the youth offer. IGM staff were felt to be responsive to feedback and requests from the Panel, which made the process productive and collaborative.
- Applicant understanding of the Assessment Panel process was limited. Applicants described having little information about what the process consisted of and how applications were assessed.
- Staffing of applicant organisations became a central issue for the Assessment Panel when considering the youth pillar. The Panel continually identified applications where staffing was unclear or insufficient. The IGM responded by reviewing revenue requests to ensure that staffing reflected the proposed levels of expansion and providing support on this theme via the Central Support Offer.
- There were 623 eligible applications to the fund. Of these 270 (43%) were approved. Successful applicants were significantly more likely than unsuccessful applicants to say they were ready to proceed at the point of application, indicating the influence of the timelines and project-readiness in determining successful projects.
- Not owning the building or site at which the project was planned was a common reason for applications being unsuccessful. Stakeholders reflected that it could have been beneficial for building ownership or lease status to be included in the fund eligibility criteria.
- Three quarters of successful applicants (74%) were satisfied with the amount of time it had taken for them to receive an application decision. This was lower for unsuccessful applicants, less than half (45%) of whom were satisfied with this.
- Half of unsuccessful applicants (50%) were dissatisfied with the feedback provided. They felt that the information provided was not sufficiently detailed to be developmental. A lack of feedback fuelled views among some unsuccessful applicants that the assessment process lacked transparency, with some feeling they had been unfairly rejected.
- The due diligence process took longer than grantees had anticipated. They had a low understanding of the process which they felt had not been well-communicated to them. This stage commonly led to delays for grantees and their projects which in some cases led to expired contractor quotes and rising capital project costs due to inflation, forcing some grantees to use contingency funds.

4.1 Introduction

This chapter presents feedback on stakeholder experiences of the assessment and contracting processes. It discusses experiences of the Assessment Panel and Grants Committee. The chapter then

looks at differences in experiences between successful and unsuccessful applicants, as well as reasons for being unsuccessful and application feedback. Findings relating to experiences of the due diligence process prior to signing Grant Agreements are then discussed.

4.2 The Assessment Panel

Overall, the Assessment Panel and Grants Committee process was seen by stakeholders as an effective and streamlined way to assess and approve the applications, particularly in the context of the volume of applications to the fund. The Assessment Panel met monthly during the grant application and assessment period to review the applications against the three 'pillars' of organisational resilience, construction (the viability of the capital project), and the youth offer. Assessors were assigned to one of the three pillars when reviewing applications to manage the volume of applications and process them efficiently. In some cases, assessors requested further details from Relationship Managers before a decision was made. The IGM staff were felt by Panel members to be responsive to feedback and requests from the panel, which made the process feel productive and collaborative. When making recommendations, the Assessment Panel also considered how much funding had already been committed to organisations in each region, and how geographically close an applicant was to others, considering driving time and density of youth population.

Applicant understanding of the Assessment Panel process was limited, with applicants saying they did not feel involved at this stage. Applicants described having little information about what the Assessment Panel process consisted of and how their applications were being assessed. Some applicants wrongly understood the process as involving a points-based assessment.

4.2.1 Organisational resilience pillar

The organisational resilience pillar included conducting due diligence around the financial health and governance of the organisation. The organisational resilience assessment pillar was not felt to be universally applicable to all types of organisations. Local authorities and uniformed youth groups were seen to be difficult to assess due to having large budgets and a wide range of existing commitments. Consequently, IGM staff suggested that the data available to assess the organisational resilience for these types of organisations was not always sufficiently informative and required them to make informed judgements. This meant that the organisational criteria were not applied consistently across the pillar.

4.2.2 Construction pillar

The construction pillar assessed the viability of the capital project. Aspects of the construction pillar required clarification from DCMS during assessment. This included whether buildings could be built on land owned by a local authority-maintained school, given that schools were exempt from the fund. These points needed to be clarified before applications could progress. In the construction pillar, assessors considered the value for money offered by the application. Data was provided on metrics such as the cost per square metre.

As the delivery timelines shortened, what constituted project readiness in relation to the construction pillar inevitably changed. Projects needed to be ready to progress immediately following grant award as time elapsed due to the fixed fund end date.

"It could feel inconsistent, if you were an applicant who applied on day one at RIBA stage 2... You would have had a better chance than if you applied a year later... That is the reality of these types of funds, applicants have less strong applications at different periods."

IGM Staff

The pre-construction funding helped to strengthen applications and provide the assessment panel sufficient information.

"The introduction of [pre-construction grant] certainly helped the assessment panel have more refined and more accurate information over which [project] to determine whether they went ahead to the grants committee."

IGM staff

4.2.3 Youth pillar

The youth pillar assessed whether and how the organisation's youth offer has been informed by young people, youth participation, and the quality of youth practice. Assessing against the youth pillar was found to be the most problematic of the three pillars. When assessing the youth pillar, the Young Assessors Panel (see Chapter 1 for details) had a role alongside the Assessment Panel. The Young Assessors Panel was intended to inform the Assessment Panel by providing feedback on whether grantees were engaging young people effectively and provide feedback on the applicants' youth work plans. The NYA struggled to recruit for the Young Assessor Panel and the tight turnaround times for reviewing applications was often a barrier to engaging the panel. This led to limited and inconsistent feedback from the Young Assessors Panel across applications.

Stakeholders queried the representativeness of the Young Assessors Panel, and whether it reflected the target demographic of the fund in terms of age and educational achievement. Young people on the Young Assessors Panel were aged between 17 and 24, and included individuals that were in college, university, and working. Not all members of the Panel aged over 18 had a Special Educational Need or Disability. The Panel did not represent the target group aged 11-16, or those aged over 18 with a Special Educational Need or Disability.

Interviewees suggested that the Young Assessors Panel was sometimes sceptical of applications from sports-based organisations and questioned whether they truly delivered open access youth work. In these instances, the Panel would encourage Relationship Managers to gather more information from the applicant to establish if the sports activity was a 'hook' to bringing in young people and whether open access youth provision was provided alongside.

"I just think that we need to ask a lot more questions. Or different questions to establish their youth offer. So, we could figure out if it was a youth offer or not... Because there is a difference between running a cricket club and a boxing club that also supports young people...Just taking more time to ask them about what youth work they do."

Relationship Manager

Staffing of grantee organisations became a central issue for the Assessment Panel when considering the youth pillar. The Panel continually identified instances where staffing for youth services was unclear or insufficient. In response to the Panel's concerns, additional analysis of the reach figures and staffing ratios was added to each application form as something applicants needed to provide from March 2023. Depending on the extent of concerns, applications were rejected, deferred, or approved with conditions set around the development of a youth delivery services plan.

A review of applicants, both approved and in the pipeline, was also instigated to consider the extent to which grantees might experience challenges with future staffing and capacity. This led to a review of revenue requests to ensure that staffing and capacity reflected the proposed levels of expansion. These discussions contributed to the development of the Central Support Offer for grantees (Section 6.2.2).

4.3 The Grants Committee

The Grants Committee was generally found to be working effectively. However, a key challenge they faced was the tight timeframes to review applications. The Grants Committee normally had around one week to review the applications. Members of the Grants Committee were volunteering their time alongside full-time employment, which made meeting the required timescales even more challenging.

The Grants Committee used a RAG (Red, Amber, Green) rating system to evaluate applications on aspects such as governance, leadership, value for money and youth offer. Interviewees involved in this process reported that it was common for smaller, grassroots organisations to receive lower ratings due to having less established governance structures. In these cases, the Grants Committee often requested additional information, such as more detail on their workforce development plans or youth offer, to inform their decision. Some grantees were awarded funding with conditions requiring them to meet specific criteria before receiving funding. Examples of these conditions include increasing staff involvement or ensuring youth engagement, which were to be monitored during grant management.

4.4 The characteristics of successful and unsuccessful applicants

There were 623 eligible applications to the fund. Of these 267 (43%) were approved. Successful applicants were significantly more likely than unsuccessful applicants to say they were ready to proceed at the time of application. Programme data shows that just 7% of successful applicants were at an early stage of readiness, compared to 40% of unsuccessful applicants. Most successful applicants (61%) were ready to start within three months, compared to just over one third (36%) of unsuccessful applicants (Table 4.1).

Table 4.1 Applicant Project Readiness

Project readiness	Successful	%	Unsuccessful	%
Early stage but would like to start application	12	7	79	40
Ready to start within 3 months	105	61	72	36
Mostly in place – need 4-6 months	55	32	47	24
Number of organisations	173		198	

Source: YIF2 programme data, downloaded on 1st June, 2024, 'Applications' dataset. Data incomplete.

Successful applicants (58%) were significantly more likely than unsuccessful applicants (46%) to have one or more full-time member of staff (Table 4.2), indicating an association between application success and capacity.

Table 4.2 Number of full-time staff, by application status

Number of full-time staff	Successful applicants	%	Unsuccessful applicants	%
None	103	42%	180	54%

1 to 9	73	29%	83	25%
10 to 24	30	12%	28	8%
25 or more	42	17%	40	12%
Total	248	100%	331	100%

Source: YIF2 programme data - Downloaded on 1st June, 2024, 'Applications' dataset. Data incomplete.

4.5 Reasons for unsuccessful applications

IGM staff said that although reasons for applications being unsuccessful varied, there were recurrent issues. A lack of project readiness was a frequent reason due to the tight timeframe in which the fund needed to be delivered (see Table 4.2). IGM staff also said that some applications were ambitious beyond the scope of the fund or the scale of grants available.

Not owning the building or site at which the project was planned was another common reason for unsuccessful applications. IGM staff and applicants alike suggested that factors such as building ownership or having a long-term lease on the site ought to have been included as fund eligibility criteria. Organisations whose applications were unsuccessful for this reason said that it was frustrating that this had not been made clear earlier in the process. In some cases, applicants felt the requests for land ownership or long-term leases led to a 'chicken and egg' situation, where they did not want to use reserve money to secure land in case their application was unsuccessful.

There were various reasons given by applicants for making applications towards the end of the fund period, included delaying submission until the building's lease had been extended. Others felt they did not receive much notice that the fund was going to close, which led to less time to complete the application, which they felt could have influenced their success.

4.6 Views and experiences of application feedback

In the applicant survey, three quarters of successful applicants (74%) said they were satisfied with the amount of time it had taken for them to receive an application decision. This was lower for unsuccessful applicants, amongst whom less than half (45%) reported this. More than one in five unsuccessful applicants (22%) were dissatisfied with the amount of time it took to hear back. In the qualitative interviews, experiences of time taken to receive a decision varied. Some organisations said it had taken months to receive the outcome of their application, whilst others received a decision within a week or two. The time taken to hear back is likely to have been influenced by when in the monthly Assessment Panel cycle applications were made, and time required to address any clarifications.

Table 4.3 Satisfaction with time taken to hear back about application, by application status

	Successful applicants	Successful applicants	Unsuccessful applicants	Unsuccessful appli
	N	%	N	%
Very satisfied	56	31%	18	9%
Satisfied	78	43%	76	37%
Neither satisfied nor dissatisfied	25	14%	54	26%

Dissatisfied	14	8%	25	12%
Very dissatisfied	6	3%	20	10%
Don't know / Not applicable	3	2%	14	7%

Source: Applicant survey, SATISFACTION, weighted data, all applicants, N=389

Satisfaction with the feedback provided about applications differed according to the outcome. Most successful applicants responding to the survey (81%) were either 'very satisfied' or 'satisfied' with the feedback provided. However, only a quarter (25%) of unsuccessful applicants felt the same. Amongst unsuccessful applicants, half (50%) said they were dissatisfied with the feedback provided (Table 4.4).

Table 4.4 Satisfaction with feedback provided on application, by application status

	Successful applicants		Unsuccessful applicants	
	N	%	N	%
Very satisfied	61	34%	13	6%
Satisfied	86	48%	38	18%
Neither satisfied nor dissatisfied	20	11%	42	20%
Dissatisfied	5	3%	61	29%
Very dissatisfied	2	1%	44	21%
Don't know / Not applicable	8	4%	10	5%

Source: Applicant survey, SATISFACTION, weighted data, all applicants, N=389

Applicants who were dissatisfied with their application feedback felt that the information provided was not sufficiently detailed to be developmental, and not proportionate to the time and effort invested in applying. Interviewees in this position described receiving short, non-specific email responses that did not feel personalised to their application and appeared to be from a template.

"I understand they have a lot of applications, but we got to the last hurdle, and I put months of work into it, and for a small organisation like us that is thousands of pounds."

Unsuccessful Applicant

Interviewees who were dissatisfied with the feedback process said that the IGM did not provide further clarification on the reasons for the unsuccessful award, or the opportunity to discuss the feedback. This lack of detailed feedback sometimes resulted in unsuccessful or ineligible applicants feeling that their application had been incorrectly assessed or unfairly excluded from the process. It is very common and typical for applicants that are unsuccessful in these types of funding competitions to provide negative feedback and be less satisfied, and this is not necessarily a reflection of the processes working badly. The IGM has an established complaints process, which was used by a small number of applicants.

"I wanted to appeal, and I wanted to complain but there was nobody to complain to...it just seems wrong...You may as well have been dealing with a computer, there was just no feedback at all."

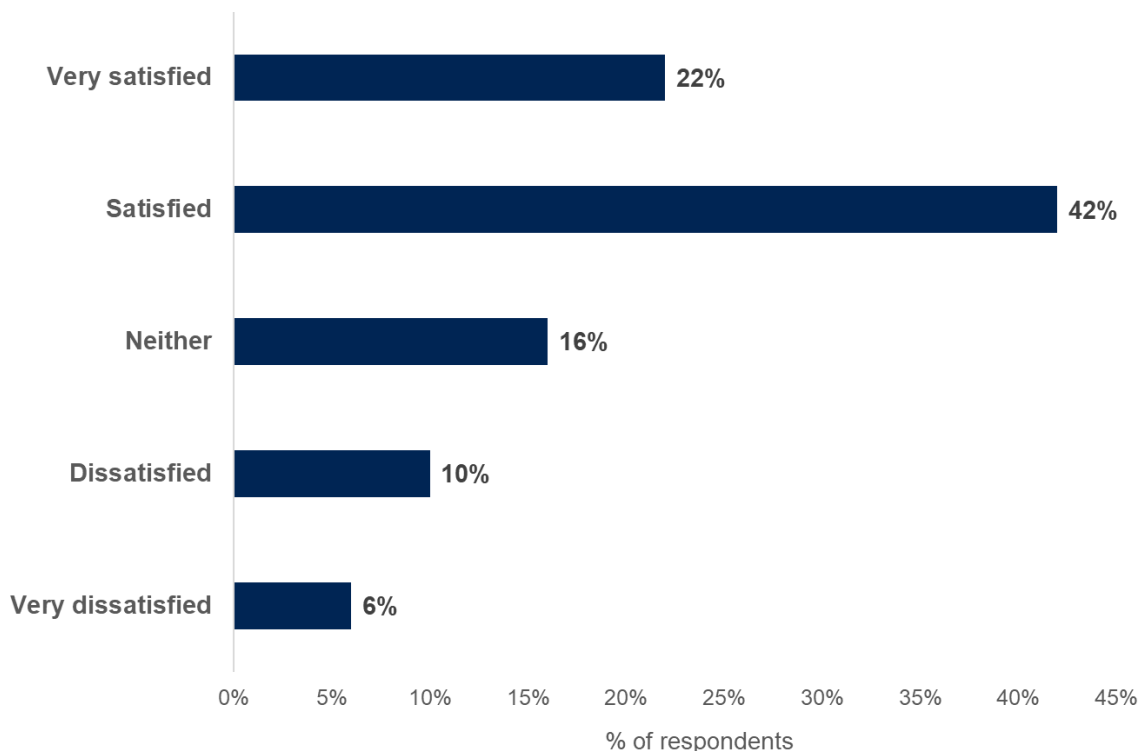
Unsuccessful Applicant

4.7 Grant Agreements

Once projects had a successful application decision from the Grants Committee, they worked with their Relationship Manager through legal due diligence before agreeing and signing a Grant Agreement. All successful applicants had signed a Grant Agreement by June 2024.

Grantees understood the reasons for due diligence and appreciated the importance of carefully managing the distribution of public funding. The applicant survey found that almost two thirds (64%) were satisfied with the information requested after the grant was approved and one in every six (16%) were dissatisfied (Figure 4.5).

Figure 4.5 To what extent are you satisfied with the information requested after the grant was approved (due diligence)?



Source: Applicant survey, SATISFACTION, weighted data, successful applicants, N=182

The IGM worked to issue Grant Agreements swiftly to give applicants time to seek legal advice. In addition, to help assess and manage the projects, the IGM incorporated support from partners such as Fusion 21, an organisation that specialises in procurement, and solicitors to aid applicants with the legal side. However, the expected duration of due diligence and the relevance of some requested documentation were not always clear to applicants.

During the due diligence process, time was required to provide documentation about the terms of land registry, check the title registers and leases for funded facilities. Common issues included unclear land ownership and lease agreements. For example, some applicants did not have a lease at the time of approval, or the time needed to negotiate. Grantees awarded in the earlier rounds without full planning permission noted that the length of time required to obtain full planning consent could contribute to

delays at this stage. Applicants that had not signed their Grant Agreement by the time of the phase 1 interviews discussed the types of issues that remained unresolved. For example, one organisation's legal team were concerned about what would happen if the development was not completed prior to the end of March 2025. They wanted to understand the risks in this scenario and be clear about liability through the Grant Agreement. With these issues, some staff felt that clearer communication about required documentation, and a pre-construction phase in-built in the timelines could have expedited the process.

In cases where due diligence took longer than expected, there were tangible consequences for grantees which were noted in the first phase of interviews prior to all Grant Agreements being signed. There were examples of where delays had led to expired contractor quotes and rising capital project costs due to inflation, forcing some grantees to use contingency funds. Covering staff time and other expenses before the Grant Agreement was signed strained organisational budgets and created financial uncertainty.

“We still have not signed the Grant Agreement...We need to provide them a schedule of work...but we struggling to find companies to agree to start and give us quotes before we know when the money is coming in...We are having to get refresh quotes, as some of the original contractors can no longer work on the project, and prices have gone up.”

Grantee

5 Findings: Grants awarded

Chapter summary

- All eligible local authority areas had facilities that were awarded funding.
- Pre-construction grants were introduced in January 2023 to provide financial resource to youth organisations for the development of high-quality applications. £2.5 million was provided in pre-construction grant funding. These grants were deemed invaluable to supporting grantees' technical drawings, surveyors, and legal work.
- By June 2024, £246 million had been awarded in capital funding. Refurbishments made up over half (56%) of the total number of projects, but these were typically lower value grants. Construction projects were fewer in number but accounted for a larger proportion of total investment by the fund.
- Around £17.5 million of revenue funding was applied for by grantees. One in five (19%) grantees did not initially apply for any revenue funding. The balance between revenue and capital funding was assessed on a project-by-project basis during the application process. In some cases, applicants were encouraged by the IGM to apply for more revenue funding and for different categories of revenue support. This meant that by 1st June 2024, the total amount of revenue awarded to grantees had increased by nearly £10 million, to £27.5m.
- Grants were made upfront rather than in arrears, which meant monitoring was critical but complex as payments went out and evidence was requested afterwards. Grantees appreciated the flexibility with which funding was distributed.
- Some IGM staff and grantees found Salesforce to be challenging to effectively monitor the progress of the fund and thought a construction-based monitoring tool would have been more effective.

5.1 Introduction

This chapter provides an overview of the grants awarded by June 2024 for pre-construction grants, and capital grants, and the revenue grants applied for by successful applicants. It then covers the views and experience of grant distribution and grant management from the perspective of IGM staff and grantees.

5.2 Overview of grants awarded

The fund spending profiles for each financial year were agreed by HM Treasury via a full business case submitted by DCMS. Several stakeholders noted that this had caused challenges when the budget was higher than actual spend. At the end of the 2022/23 financial year, £62.2 million capital funding was surrendered to the Treasury. Stakeholders, staff, and grantees felt that the annual funding profile did not sufficiently reflect the complexity of capital investment.

5.2.1 Pre-construction grants awarded

Pre-construction grants were introduced in January 2023 to financially resource youth organisations to develop high-quality applications. £2.5 million was provided in pre-construction grant funding. Where grantees had accessed this funding, they found it invaluable to help cover the costs associated with applying to the fund, specifically for aspects such as technical drawing, surveyors, and legal work. Stakeholders thought it would have been beneficial for pre-construction grants to have been available

from the outset of the application period to speed up the development of applications. The IGM reported that they raised a lack of pre-construction grants as a gap during the bidding process to become the IGM and throughout the first stage of the fund. Stakeholders reflected that having this funding available earlier in the process would have positively contributed to meeting spending profiles.

5.2.2 Capital grants awarded

By June 2024, £246 million had been awarded in capital funding. There were just 16 large scale construction projects (6% of the portfolio), but combined they accounted for over a quarter (26%) of the investment. Multi-site projects¹⁵ were common, accounting for nearly one in five successful applications (17%) and 30% of the investment. Refurbishments accounted for the highest number of projects (more than half of the total), but just 22% of the overall investment (Table 5.1).

Table 5.1 Grantees – Capital project type

Capital project type ¹⁶	Successful applications	% of successful applications	Investment value	Investment %
Large scale construction – above 600sqm	16	6%	£64,414,100	26%
Mid-scale construction – 350 to 600 sqm	9	3%	£9,253,500	4%
Small scale construction – Under 350 sqm	18	7%	£11,136,400	5%
Multi-site	45	17%	£74,416,600	30%
Refurbishment	148	56%	£55,041,400	22%
Renovation	26	10%	£31,861,400	13%
Total	262	100%	£246,123,400	100%

Source: Programme data downloaded on 1st June, 2024, 'Applications' dataset, Missing information (n=8))

5.2.3 Revenue grants applied for

Around £17.5 million of revenue funding was applied for by applicants that would become grantees. One in five (19%) grantees did not initially apply for any revenue funding. Half of grantees initially applied for revenue funding for salaries (53%), for example of existing staff to oversee the management of the project. Qualitative interviews found that the revenue funding was mainly used to fund existing or new staff to support the build. For example, internal or external project managers to manage the build.

Around one third applied for revenue funding for training or project management (30% and 36% respectively). A quarter of grantees (26%) applied for revenue funding for other activities which included marketing and promotion activity, website software and systems, and renting facilities to continue delivery whilst building works were taking place. One in five grantees (21%) applied for revenue funding for overheads such as insurance, cleaning, caretaking, and maintenance (Table 5.2).

¹⁵ One organisation with several development sites.

¹⁶ When the fund first opened capital project type was self-selected by the applicant. Once the refurbishment application form was launched, refurbishments were defined as projects valued at up to £150,000 capital, not requiring planning permission and a refurbishment on an existing building. Renovation projects are those in the main fund that are not new builds.

Table 5.2 Revenue funding applied for in initial applications by grantees, by revenue type

Revenue spend type	Number of grantees	% grantees applying for revenue funding type during initial application
Salaries	137	53%
Project Management	92	36%
Training	78	30%
Other	67	26%
Overheads	55	21%
No revenue funding applied for	49	19%

Source: Ipsos analysis of programme data from IGM

Looking at the total amount applied for by grantees in each of these revenue categories, salaries accounted for nearly two-thirds of revenue funding applied for at the point of initial application at £11.5 million (65%) (Table 5.3).

Table 5.3 Revenue funding applied for by grantees at initial application, by revenue type

Revenue spend type	Total spend (£)	Mean spend (£)	% of revenue spend
Salaries	11,529,363	88,687	65%
Project Management	3,082,103	33,869	17%
Overheads	1,174,578	20,974	7%
Training	975,687	13,009	6%
Other	897,721	13,811	5%
Total	17,659,452		100%

Source: Ipsos analysis of programme data from IGM

The balance between revenue and capital funding was assessed during the application process, and where appropriate applicants were encouraged by Relationship Managers to apply for more revenue funding, and for different categories of revenue support. By 1st June 2024, the total amount of revenue awarded to grantees had increased by nearly £10 million, to £27.5m.

Programme guidance for applicants about what revenue funding could be used for was highlighted as an area for improvement.

"There was not a lot of detail around revenue...What could be included, not included for revenue...That sort of information only came out later on."

Relationship Manager

5.3 Profile of grants awarded

All eligible local authority areas had facilities that were awarded funding. Just under one third of the value of grants awarded (30%) went to organisations in the Northwest (Table 5.4). Analysis of population estimates of the number of 11–18-year-olds in YIF2 areas found that 20% of eligible young people lived in the Northwest region (Table 5.4). The capacity and readiness of youth organisations to apply to the

fund was reported by stakeholders to vary and be linked to the size of the workforce and number of paid staff.

Table 5.4 Grant amount approved, by region

Region	Grant Amount Approved (£)	% of total award	% of eligible young people
East Midlands	7,840,988	3%	9%
East of England	17,867,038	7%	11%
London	5,155,515	2%	4%
Northeast	23,477,432	9%	17%
Northwest	76,538,218	30%	20%
Southeast	47,270,754	18%	9%
Southwest	31,601,770	12%	6%
West Midlands	16,649,231	6%	14%
Yorkshire and Humberside	29,811,623	12%	11%
Total	256,212,569	100%	100%

Source: Ipsos analysis of YIF2 programme data, successful applicants as of 1st June, 2024, IGM analysis of ONS ward level population estimates ([ONS](#), 2023)

Most of the fund was distributed to one of three types of organisations. Around one third of the total value of the grants awarded were to Charitable Incorporated Organisations (CIOs) (31%), with another third (32%) awarded to Companies limited by guarantee, and 20% awarded to local authorities. Other awards were to Community Interest Companies, Companies Limited by Shares or Other organisational forms (Table 5.5).

Table 5.5 Grant amount approved, by organisation type

Legal Form	Grant Amount Approved (£)	% of total award
Charitable Incorporated Organisation (CIO) ¹⁷	81,536,900	31%
Company limited by guarantee ¹⁸	83,868,500	32%
Local Authority	51,070,000	20%
Other	16,004,200	7%
Company limited by shares ¹⁹	8,615,700	3%

¹⁷ A charitable incorporated organisation is a corporate form of business designed for charitable organisations in England and Wales.

¹⁸ Limited by guarantee companies are usually 'not for profit'. This means the company is legally separate from the people who run it, has separate finances from your personal ones, has guarantors and a 'guaranteed amount', invests profits it makes back into the company.

¹⁹ A company owned by shareholders, who have certain rights.

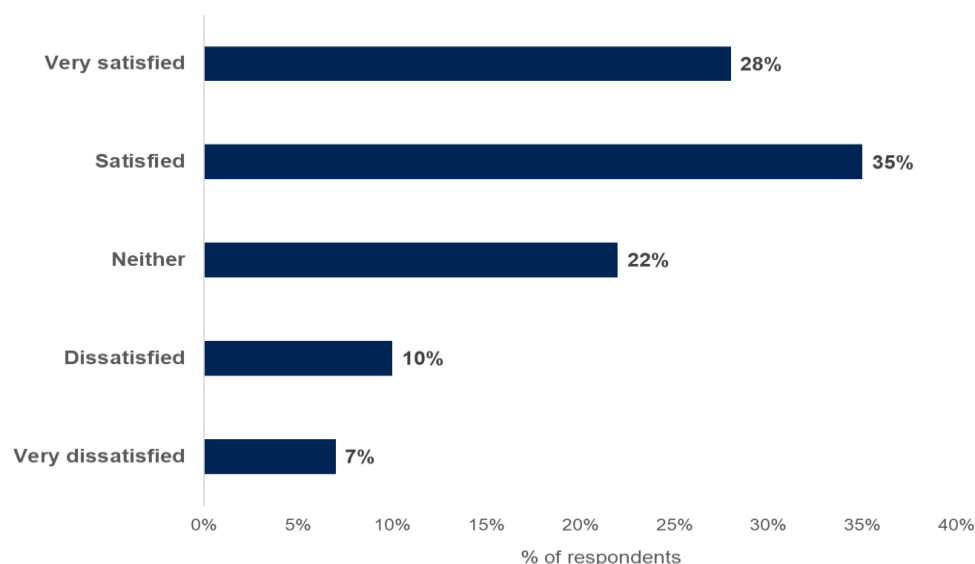
Legal Form	Grant Amount Approved (£)	% of total award
Community Interest Company (CIC) limited by guarantee ²⁰	7,215,400	3%
Unincorporated organisation ²¹	7,915,500	3%
Industrial & Provident Society ²²	2,550,600	1%
Registered Society (BENCOM) ²³	466,900	0%
Total	259,243,700	100%

Source: Ipsos analysis of YIF2 programme data, successful applicants as of 1st June, 2024

5.4 Views and experiences of grant distribution

Grantees welcomed the process of payments being made in instalments and were usually paying contractors in the same way. Around a third (32%) of grantees who responded to the applicant survey were not able to rate their satisfaction with the time taken to receive the first grant payment because they had either not yet signed a Grant Agreement and/or been paid at the time of the survey. Excluding applicants in these circumstances, the majority (63%) were satisfied with the time it took to receive the first payment (Figure 5.6). This was reflected in the qualitative interviews where grantees appreciated the flexibility with which funding was distributed. Examples of this responsiveness included grantees making multiple claims within a month which was felt to be important given the volatility in the construction industry and operating environment.

Figure 5.6 To what extent are you satisfied with the amount of time taken to receive the first grant payment



Source: Applicant survey, SATISFACTION, weighted data, all successful applicants excluding Don't Know, N=123

²⁰ Community Interest Company (CIC) is a special type of limited company, which exists to benefit the community rather than private shareholders. It usually invests any profit back into the company.

²¹ An 'unincorporated association' is an organisation set up through an agreement between a group of people who come together for a reason other than to make a profit (for example, a voluntary group or a sports club).

²² An industrial and provident society (IPS) is an organisation set up to carry out a trade or business for community benefit.

²³ A Community Benefit Society is a registered society that has an asset lock, so that its assets cannot be distributed to its members in the event of a winding up, and surpluses cannot be paid to members by way of a dividend.

5.5 Views and experiences of grant management

Grants were made upfront rather than in arrears, which meant monitoring was critical but complex as payments were going out in advance and evidence was requested afterwards. Monitoring was completed by Relationship Managers who checked the dispersal and milestone dates. These were checked against the contract and what construction contractors were briefed to do. In addition, written updates were provided by grantees. Relationship Managers found this process worked in favour of the grantees but also made it challenging to reconcile and evidence expenditure, particularly whilst working at pace.

“It is difficult to move quickly and have forensic attention to detail.”

Relationship Manager

Grantees described the process of applying for each instalment and submitting the evidence of spend and receipts onto the Salesforce system. All forecasts and drawdowns were completed online, and payments were received in a timely manner. Salesforce enabled grantees to draw down grants in advance, plan and track their spending, and upload evidence. For some grantees approved in the first rounds, guidance on the draw-down process was available after they had begun work, making it difficult to manage and retrieve evidence.

“It's immensely frustrating as you're never given clear guidance in terms of drawing money down...you're just not sure how to justify the expenditure, the guidance around the expenditure only came out last month or the month before, when we're already months and months into the project.”

Grantee

Once guidance was developed, following it to make a claim was challenging for smaller organisations and those with less experience working with grants on this scale. Grantees felt that the evidence requirements should be proportional with smaller grants having reduced monitoring requirements to reflect the amount of funding received.

Some stakeholders found Salesforce to be challenging to effectively monitor the progress of the fund and thought a construction-based monitoring tool would have been a more effective. Linked to this, stakeholders felt that having a construction company involved at the outset would have been beneficial to support the IGM on the more technical aspects of monitoring grantees' projects.

6 Findings: Creating new and improved facilities

Chapter summary

- At the end of June 2024, in the Main Fund, one approved project was at the planning stage, and a further fifth (21%) of projects were in procurement. Across the Main Fund and Refurbishment Fund, a quarter (24%) of projects had completed by June 2024.
- Grantees reported delays to the start of their projects primarily due to issues during planning and procurement. Delays were often due to the length of time to complete the due diligence process and to sign Grant Agreements, but also due to unforeseen circumstances, such as weather disruptions or site issues once a project started.
- The fund timescales represented a significant challenge and the IGM sought to maintain the momentum of the portfolio by engaging a construction company (Turner and Townsend) part way through fund distribution. Stakeholders felt that Turner and Townsend had made a valued contribution to keeping construction projects on time. They also felt that having a construction company involved from the outset would have been beneficial to support the IGM on the more technical aspects of monitoring grantees.
- All grantees were allocated a Relationship Manager who was responsible for providing support. Relationship Managers had a portfolio of around 9 to 15 grantees and had at least one monthly update with each, with contact increased to weekly or fortnightly if there were challenges with the project. Overall, grantees found Relationship Manager's support to be invaluable.
- Grantees noted that Relationship Manager support was not as effective with challenges related to construction, and stakeholders also felt that the support may have been more effective if the Relationship Managers had more construction experience or a higher level of understanding of the construction process.
- By July 2024, 151 packages of support had been approved by the Central Support Offer. These supported 44% of grantees in the Main Fund and 6% of grantees in the Refurbishment Fund. The variety of support offered is notable, with grantees accessing 14 different types of support. Support packages associated with building project management accounted for the highest share of the total spend (54%). Grantees that had attended Central Support Offer networking events and webinars found them useful and said they enabled them to build networks, share knowledge and learn from peers.
- Grantees and stakeholders generally felt that the Central Support Offer became available too late, especially for grantees who had received funding in the first phases and were nearing completion or had been unable to benefit from the support at the right stage of their build or refurbishment.
- Early analysis indicates concerns among some grantees about being able to recruit staff and volunteers when their capacity increases. This was also a concern of the Grants Committee. The ability of grantees to recruit and develop staff will be critical for the provision of more positive youth activities for young people in the YIF2 facilities.
- Environmental sustainability was not an investment pillar, and some applicants did not submit plans that involved significant investment in environmental features fearing it would negatively affect the perceived value for money of their project. Yet others embedded environmental sustainability and felt it would positively contribute to their financial resilience in the long-term

through a reduction in energy bills, increase in the amount of energy they could self-generate (e.g. through solar). They also hoped these features would make the space more attractive to let out.

6.1 Introduction

This chapter summarises progress of YIF2 projects towards delivering new and improved youth facilities. It highlights current fund progress, and views and experiences of support from the IGM, and ways in which grantees are planning for a sustainable future beyond YIF2.

6.2 Delivering new and improved facilities

At the end of June 2024, in the Main Fund one approved site was at the planning stage, and a further fifth (22%) of projects were in procurement (Figure 1.3). The fund timescales represented a significant challenge and the IGM sought to maintain the momentum of the portfolio by engaging a construction company (Turner and Townsend) part way through fund distribution. Stakeholders felt that Turner and Townsend had been a valued addition to maximise spending within financial years and keep construction elements of projects on time and providing support to grantees facing time and budget challenges in their project.

Grantees reported delays to the commencement of their projects primarily due to issues arising during planning and procurement. Delays were often attributed to the length of time to complete the due diligence process and to sign the Grant Agreements, but also due to unforeseen circumstances, such as weather disruptions or site issues once the construction had started. Delays in planning caused procurement challenges for grantees when costs for materials and construction work had increased due to inflation. In some cases, grantees received additional funding or used their project or fund level contingency money to cover the additional costs.

“We eventually started in December [2023] but prices had gone up because of the delays by nearly 10%...The grant did give us more money, so we were not out of pocket.”

Grantee

IGM stakeholders reported that several grantees had not received this level of funding before and had limited experience delivering capital projects of this scale, which may have contributed to delays getting capital works started as they navigated planning and procurement processes.

To ensure value for money, most grantees organised a competitive procurement process and selected the quote which offered best value. The exception was for smaller grants, where grantees frequently worked with a single contractor they had used previously and had offered reduced prices. To support grantees with procurement, a YIF2 partner organisation, Fusion 21, shared a framework for working with contractors. Grantees noted they had found this framework useful.

“In the tendering process we had 3 contractors come to us...In the end the best value option was the cheapest. We had certain criteria like using local resources like staff, and the cheapest one happened to fulfil our criteria. We worked with Fusion 21 on this, they helped us with our procurement and criteria. They sent out packs, with questions to all our contractors, they were very good.”

Grantee

Generally, grantees hired an external contractor to manage the project when the capital funding was over one million pounds in value. Other grantees, with smaller amounts of funding, used revenue funding

to pay existing staff to oversee the project. There were also cases where volunteers were managing projects.

Around a quarter (24%) of projects were completed by June 2024. Qualitative interviews with grantees in this position suggested that their projects had been completed broadly within the planned budget and that the build or refurbishment had been delivered as planned. Grantees that had overspent used contingency funds within their projects, which were set at 15% as projects advanced, plus 2.5% per quarter of the forecast build to cover unexpected costs. Grantees also sourced additional funding from other funders such as local authorities and the National Lottery Community Fund to complete the works. Grantees reported that the main reasons for going over budget were increases in material costs and unanticipated costs for additional work once the project had started, such as those relating to waterworks.

6.3 Views and experiences of IGM support

6.3.1 Relationship Manager Support

Overall, grantees' experience with their Relationship Manager throughout the various stages of YIF2 was very positive. Grantees found Relationship Manager's support to be invaluable and that they were generally understanding, supportive and responsive. Similarly, stakeholders thought that the Relationship Managers provided a good level of support to grantees and were able to handle issues sensitively.

"The support was amazing, it was like no other support I have received...we had run out of funding...But she was so kind and supportive, it was that personal touch...She cared so much and understood, she told us to apply for Revenue funding, which was for £150,000 and then we received additional funding from our other funders."

Grantee

Grantees described trusting and supportive relationships in the main where they felt able to discuss any issues that arose, particularly in relation to financial matters.

"We have meetings with them monthly...They [Relationship Manager] supported us to get the uplift. We really needed it as costs have been rising and she was proactive in looking at what we needed and getting that."

Grantee

There were variations in the experience of the support and communication between the Relationship Managers and grantees depending on the grantees' experience of this type of funding and capital project, size of the build or refurbishment, and the Relationship Managers' style of working. There were examples where grantees would have preferred their Relationship Managers to conduct more site visits and build an in-person relationship.

In a small number of cases, grantees felt the support they had received was insufficient. This included where grantees had worked with multiple Relationship Managers due to staff turnover, or when they felt that their Relationship Manager did not respond in a timely manner to their communications.

Some grantees felt that Relationship Manager support was not as effective with challenges related to construction. Some stakeholders felt that the support may have been more effective if the Relationship Managers had more construction experience or a higher level of understanding of the construction process. Some grantees looked to the Central Support Offer for support with this. Building project management was the Central Support Offer package accounting for the highest share of the total spend (Table 6.1).

Relationship Managers offered support and advice on additional funding. There were examples where grantees had requested additional funding from YIF2 due to rising construction or unforeseen costs on the advice of their Relationship Manager. Where costs rose significantly, some grantees made changes to their projects, for example removing elements such as solar panels to keep within budget. Others had been encouraged to apply by their Relationship Manager for more revenue funding from YIF. However, not all grantees were aware additional funding could be requested once a Grant Agreement had been signed and were managing rising costs within their original allocation. The fund position on this could have been clarified and communicated consistently to all grantees.

6.3.2 Development plan support

NYA worked with grantees in the Main Fund to support with the development of their youth offer to create their youth development plans and assigned grantees to a Youth Work Specialist. The development plans were mandatory for Main Fund grantees as part of their grant condition, but not for grantees in the refurbishment fund. Grantees were provided with a template and the quality standards to assess what type of support they might need and identify any gaps. For example, some grantees asked NYA for additional support on their recruitment plans, risk management, safeguarding processes, and workforce development. The NYA found that many grantees needed support to ensure they were aligned with the NYA Quality Mark. Several grantees who participated in interviews had received support from the NYA with their development plans. In some cases, grantees found this support helpful, especially where they had no existing youth plan in place, others found the work onerous on top of other information they had to provide for the monitoring of the fund.

"We have not got any support as such from NYA, but they have asked us for a lot of information about our youth development plans...It has felt like a box ticking exercise, it's been really onerous to provide all the information they needed, it's not a good use of staff time."

Grantee

Those that attended the NYA training webinars found the sessions helpful, particularly around youth work strategies and the self-assessment tools.

"NYA have given us some really useful feedback.... They have also given us some guidance on our weakness and strengths. They advised us to look at the training for youth workers and also put us in touch with other providers that have youth workers and we have talked about the challenges of training youth workers."

Grantee

6.3.3 Central Support Offer

Grantees could take up aspects of the Central Support Offered by the IGM they perceived to be useful to their organisation (the Central Support Offer is described in Section 1.7). The programme data shows that in June 2024, 151 support packages had been approved, totalling £732k. Around half (44%) of Main Fund grantees had accessed the Central Support Offer, compared to six per cent of grantees in the Refurbishment Fund. Grantees accessed over 14 different types of support packages (Table 6.1). Support packages focussed on training youth workers were the most frequently accessed by grantees. Support packages associated with building project management accounted for the highest share of the total spend (54%). The range of support accessed is notable indicating the variety of support needs among grantees and diversity of the offer available to meet these.

Table 6.1 Number of grantees accessing central support, by support type

Support type	Total spend (£)	Total packages by support type	Total Main Fund grantees accessing support type
Youth worker training	51,100	39	34
Peer support	-	25	24
Organisational MOT	9,120	19	19
Building project management	394,023	18	17
Financial management	48,300	16	14
Income generation	16,620	8	8
Marketing and social media	37,164	7	7
Change management	39,480	6	6
Quantity surveying	75,467	5	5
Youth worker recruitment	27,342	3	3
Governance	12,510	2	2
VAT advice	5,100	1	1
Procurement and contracting	11,205	1	1
Incorporation	5,040	1	0
Building sustainability advice	-	0	0
Monitoring and evaluating impact	-	0	0
Total	732,471	151	141

Source: YIF2 programme data submitted to the Youth Delivery Committee, 4th July 2024

Grantees who had attended Central Support Offer networking events and webinars found them useful in building their knowledge around aspects they found challenging or had little experience in. The events enabled grantees to build networks, share knowledge and learn from other peers.

Where grantees had received advice on business development or their organisation's financial plans, they reported this to be useful. For example, one grantee received one-to-one support from an advisor on financial forecasting and cash-flow which they found helpful to inform a review of their organisation's fundraising and financial strategies. Grantees appreciated the subscription to Funds Online²⁴, offered as part of the central support package. This covered the £500 annual subscription fee and provided grantees with access to funding grants.

"I am going to one next week in [Area]...It is an opportunity to meet funders and speak to them about our projects and potential funding. I always think that is more successful, talking to them in person about the funding, rather than apply for it anonymously."

Grantee

²⁴ A database helping organisations to access funding opportunities from over 8,000 funders.

Grantees were also able to access individualised tailored support. The central support team held one-to-one portfolio discussions with the Relationship Managers to discuss and assess the needs of their grantees. The Relationship Managers then signposted grantees to the relevant support and showed them how to sign up by logging into the Salesforce system.

“Sometimes it's a bit more difficult if you [the RM] identify it, because they might not necessarily see it as a weakness, but it's just trying to explain why you think it would benefit them.”

Relationship Manager

Grantees and stakeholders generally felt that the Central Support Offer had become available too late, especially for grantees who had received funding in the first phases and were nearing completion or had been unable to benefit from the support at the right stage of their build or refurbishment.

Programme data shows that by June 2024, just over half (54%) of Main Fund grantees, and most (94%) of grantees on the Refurbishment Fund did not have an approved Central Support Offer package. In the qualitative interviews, grantees reported they had not accessed support because they were focused on the build or refurbishment and had limited time available to engage with this. Generally, grantees were aware of the Central Support Offer through their Relationship Managers, who had suggested additional support and signposted how to sign up. Others had not engaged due to their structures and governance, such as Uniformed Youth Organisations who have their own qualification structures. Others felt that the support offered was not relevant to them due to their organisational experience and expertise with training, qualifications and project management.

Stakeholders expected the take-up of the Central Support Offer to increase as more buildings neared completion. It was common for grantees that had not used the Central Support Offer at the time of the interview to be interested in exploring this once their project had been completed. Grantees with a small number of staff highlighted capacity and time as a barrier to taking up the Central Support Offer.

6.4 Planning for a sustainable future

Ensuring that grantees and facilities are sustainable beyond the fund is central to the achievement of the fund's ambition. In the context of YIF2, sustainability considerations relate to the creation of energy efficient facilities, ensuring the organisational capacity and capability of grantees to be financially resilient, ensuring that funded organisations can recruit a suitable workforce and engage effectively with young people. Interim findings relating to grantees' progress towards each of these ambitions are outlined below.

6.4.1 Energy efficiency of facilities

A tension was raised between the fund's aspirations for environmental sustainability, and the competitive funding process. Environmental sustainability was not an investment pillar, and some applicants were concerned about submitting plans that involved significant investment in environmental features fearing it would negatively affect the perceived value for money of their project.

“I haven’t really seen as many things like solar panels or heat source pumps. Although we promoted or advised that environmental sustainability was something we were considering, value for money is also a key point of this fund as well. And I think sometimes there was an unwillingness to put in these quite expensive items for fear it would compromise core value for money.”

IGM Staff

Details on how applicants could include sustainability in their project plans could have been a more integral part of the information and guidance provided to applicants. This could have included examples of environmentally sustainable features, the costs, and projected longer term financial and environmental benefits, alongside how energy efficiency would be assessed during the application process. There were grantees where youth engagement had emphasised the importance of Net Zero for their facility:

“We asked our young people what they wanted from the new building, and they all wanted NetZero...So the aim is to be NetZero, we have had the gas taken out, so no fossil fuel use and we have put in solar panels. We have also kept the original air source heat pump...We will have surplus energy to sell back to the mains.”

Grantee

Other grantees had embedded environmental sustainability into their project, and not all environmentally sustainable features planned by grantees were expensive. For example, while grantees discussed solar panels and heat pumps, they also discussed effective use of insulation, installations of LED lights and use of windows to bring in natural light which would all improve their energy efficiency.

Overall, stakeholders thought that energy efficiency improvements to builds and refurbishments was not seen as a priority due to competing demands to deliver projects within a tight timeframe and within budget. At the application stage, grantees outlined details on the environmental changes they planned to achieve but some of the changes were removed once grantees had reached the due diligence process and found the changes were going to be too expensive (for example, adding solar panels or wall insulation). However, the plan was for the new committees to track any energy efficiency changes and monitor any changes as part of the core objective of the Fund.

Energy efficiency is sometimes the first thing to go when tenders come back with inflation. It tends to be more of a ‘nice to have’ rather than ‘must have’, just with some cases.

Relationship Manager

The focus on energy efficiency was discussed by grantees implementing sustainable features as being likely to contribute positively to their financial resilience long-term, with the intention that this would free-up money to spend on other aspects of their work. Grantees felt that money would be saved by a reduction in energy bills, and where such features had been installed, increase in the amount of energy they could self-generate (e.g. through solar).

“The walls will also be more insulated. We have really thin walls in this building. So, all that will save on energy bills, which we can spend on the youth people.”

Grantee

However, this was not universally the case and there were instances that highlighted the complexity in terms of the costs that could be saved, how to measure changes to energy use before and after the fund and ongoing servicing and maintenance costs associated with the improvements.

"In terms of reducing cost, we don't know what the savings will be, it might actually be more than before....You see before we did not use much energy, because the boiler was so inefficient, so the place was just cold all the time...Now it will be a warmer building, but our projections show that our bills might actually go up, as in the past we did not use the heating system, as it was totally debunked."

Grantee

Grantees commented that improvements to their facilities would create more desirable spaces to let out. It was noted that projects with energy efficiency and environmental sustainability at their core had unique features that could be used to generate revenue from external bookings to help increase their financial resilience. One example was a facility which was installing solar panels and intended to generate all the energy consumed onsite. They assumed that this would mean that organisations using the facility for events could market them as carbon neutral.

"I think especially businesses, they like to say how energy efficient they are...So this will be a more desirable space to let out...It will generate more income."

Grantee

There was emerging evidence from the grantee interviews that the energy efficiency changes to date have led to some cost savings, such as reduced energy bills and selling excess energy back to the grid network. For example, one grantee installed solar panels as part of a refurbishment and found that their energy bills had reduced from £162 to £36 a month. They had put these savings towards their overhead costs and used them to increase the hours of one of their staff members. However, most grantees felt that it was too early to report on whether these changes would free up resources, but they intended that any savings would feed back into supporting young people to attend the youth activities. For example, one of the Uniformed Youth Groups said any savings would be used to cover the costs of uniforms, organising camps and membership fees where young people cannot afford to pay. Other grantees planned to use the cost savings to offer a lower rental rate to organisations who use their space, which in turn would make their organisations more attractive and competitive and generate further income.

6.4.2 Organisational capacity and capability

The fund aims to support grantees with the development of their organisational capacity and capability through the Central Support Offer and support from Relationship Managers to ensure that their organisations are resilient and well-able to continue to deliver youth activities from the facilities into the future.

The applicant survey asked both successful and unsuccessful applicants about the organisational plans and processes for the facilities. Amongst grantees, it was most common for them to say they had an organisational mission or purpose (92%) and organisational values (90%). Looking at finance, 73% had a financial plan, 61% had a business plan, and 49% had a fundraising strategy. Looking at staff and volunteer recruitment, training, and development, almost four in ten (43%) had a recruitment plan, 62% had a volunteer management strategy and 50% had a training plan (Table 6.2). Unsuccessful applicants were significantly less likely to have a financial plan compared to successful applicants, one aspect considered in the YIF2 assessment pillars.

Table 6.2 Aspects of organisational management in written form, by applicant status

Written organisational document	Successful applicants (%)	Unsuccessful applicants (%)
Organisational mission or purpose	92%	94%
Organisational values	90%	85%

Written organisational document	Successful applicants (%)	Unsuccessful applicants (%)
A financial plan	73%	61%
A business plan	61%	54%
A volunteer management strategy	62%	53%
A training plan	50%	61%
A fundraising strategy	49%	42%
A recruitment plan	43%	34%
Don't know	2%	4%

Source: Applicant survey, BUSINESS_PLAN, weighted data, N=392

Financial resilience

Grantees felt that the capital investment could contribute to increasing their financial resilience through enabling:

- **A more attractive environment** leading to an increase in the likelihood it would be used and hired by other organisations. Some grantees noted that receiving YIF2 funding had increased the confidence of local investors who support their organisation financially and increased opportunities for wider fundraising activities due to the changes made to the build or refurbishment.

"We plan to be financially sustainable when we are fully opened, we will have the cafe and the football pitch will be for hire, we have had a number of organisations interested."

Grantee

- **Increased energy efficiency** which would positively contribute to financial resilience, as would having a more attractive space to rent out for private hire to other groups.
- **The generation of additional income** for example by inviting private funders to sponsor certain parts of the facility or renting the space to organisations during school hours.
- **More and different types of space** which would attract new and different types of organisations and offerings to use the facility, generating additional income, and in some cases enable the lead organisation to deliver new and different services which would be paid for, such as contract work supporting schools for children with special education needs or disabilities. Capital features specifically referenced here included additional spaces to deliver training, and the ability to partition parts of rooms so that the space could be used by more than one organisation or activity simultaneously. For example, one grantee had received funding from the local authority to recruit a Business Support Manager who was responsible for engaging local businesses to work collaboratively on different projects and utilise space within the building. Other grantees were developing plans on how to utilise the new building or refurbishment by renting out the space to other organisations to enhance their financial sustainability.

"[Organisation name] do not use the building in the day, so we had other groups renting it from us, like societies and puppy training schools, we plan to do that again, The new building will make it more attractive to rent."

Grantee

The Central Support Offer includes support to increase and diversify funding and sustain the running of their buildings and delivery of youth activities beyond the lifetime of YIF2. Table 6.1 showed that by June 2024, 16 grantees had accessed support relating to financial management and eight had accessed

support with income generation. The applicant survey found that organisations tended to submit multiple funding bids per year to several sources, with less than one in five (17%) applicants having submitted no other bids except YIF2 during 2021/22. Grantees who had attended the Central Support Offer sessions on fundraising found them helpful to support their wider business and sustainability plans.

In terms of maintaining the buildings for a longer period, stakeholders found that through the due diligence process, grantees were able to increase their formal lease arrangements meaning there was less risk of being evicted once they had made the changes to the building.

“Some people have been so focused on the build that actually they've not thought about the reality of when they have to open the doors and start delivering. And that's the point we're at with a lot of these groups, saying 'you need to start thinking about this'.”

Relationship Manager

Workforce recruitment

The fund was expected to contribute to an expansion of the youth sector workforce as YIF2 grant holders recruit more staff and volunteers to support an increase in activities delivered. The programme data shows that at the point of application, grantees had a combined total of over 21,000 staff, of whom around half (45%) were volunteers (Table 6.9). The mean number of full-time and part-time staff was higher than the median indicating a skew in the data, with some larger organisations, alongside those with smaller levels of staffing.

Table 6.9 Staffing and volunteers within YIF2 grantee organisations

	Total number of staff	% of all staff	Mean	Median
Full time employees	5,007	24	19	2
Part time employees	6,612	31	25	4
Volunteers	9,541	45	35	15
Total	21,160	100		

Source: Ipsos analysis of YIF2 programme data, successful applicants as of 1st June, 2024 (N = 262)

Note: Where there were more than 1,500 employees recorded and/or more than 2,500 volunteers these values were set to missing

Grantees voiced concerns about their ability to recruit suitably qualified and experienced youth workers and other staff to operate and manage their (new) facility. For example, one grantee had sought to recruit three youth workers, but was unable to find suitable candidates with prior qualifications. The organisation recruited two unqualified candidates and planned to apply for funding for training to support them to qualify. The ability of grantees to access funding to enable them to support and develop paid staff will be critical for the provision of more positive youth activities for young people in the YIF2 facilities.

"About a month ago we were struggling to recruit youth workers. We got applicants, but they just lacked the skills. We have recruited three now though. We spoke to DCMS about this, and they said it was a national problem. They have also pointed us in the right direction for training as two of them are not qualified youth workers, so we are hopefully going to apply for that."

Grantee

Several grantees also discussed challenges recruiting volunteers. They hoped that their new/ improved facility would attract volunteers but discussed how time-poor people in their local communities were, so were concerned that a lack of volunteers would remain a challenge.

A Youth Delivery Committee was set up by DCMS and the IGM in May 2024 to oversee progress on youth delivery and to ensure that the investment would have the maximum possible impact for young people. The Youth Delivery Committee board was an evolution of the Grants Committee, continuing portfolio oversight.

Workforce training

The Central Support Offer includes support for staff training and development. Table 6.1 showed that by June 2024, 39 grantees had accessed support regarding youth worker training, and three had accessed support for youth worker recruitment. Given that recruitment and retention of high-quality staff was perceived to be a challenge for the youth sector, engagement in these aspects is likely to increase. In several cases, grantees were at the planning stages of expanding their recruitment or retention activities and were intending to access the youth worker training offer to upskill staff later this year.

The quality of youth activities delivered will be critical to achieving intended outcomes for young people. There was an intention that every YIF2 facility would have at least one worker/volunteer trained to a recognised Level 1 or 2 qualification in youth work within 12 months of opening. Grantees have developed a more systematic approach to recruiting volunteers since the YIF2 funding including campaigning, the advertisement of positions and developing their website to attract new volunteers.

The number of staff and volunteers qualified in youth work prior to the investment is part of the baseline survey. This indicates that over half (57%) of successful applicants with an existing facility have at least one member of staff or volunteer at their facility with Youth Work Qualifications at Level 2 or above. However, over a third (29%) said they did not have any staff or volunteers qualified at this level, and the remaining 14% did not know.

"We haven't taken the youth work qualifications, our staff already have it...But we are planning to bring in more staff, by about 6 or 7 to deliver the sessions for youth people. We like to grow our own, hire local people, maybe people who have volunteered with us or used out centre. So we will look at youth work qualification for them."

Grantee

Provision for young people

Overall, grantees felt that the funding had provided them with the opportunity to expand and scale up their future youth provision. Many of the grantees felt that the new buildings and facilities developed as part of the YIF2 funding will enable them to provide a more attractive space for young people and improve the environment in the facility, where previously some areas had been cold, damp, or unusable. The builds or refurbishments have enabled grantees, or will allow grantees soon, to increase the number and frequency of activities available to young people. This in turn will enable them to increase the number of young people attending the facilities. For example, one grantee that made refurbishments to an existing building was able to run two sessions in parallel due to the new space available to increase their engagement with young people.

"The difference that the grant will make is the regularity in which we offer or run activities in the space. Before we were just holding activities now and then, now we will run them daily...We are also planning to open the space for longer, until 9pm, so there are more hours in the day to deliver. In the past we did not have that organisation interested in using the space."

Grantee

Some grantees had used the funding to make their building more accessible for young people with disabilities, including fitting a lift, accessible toilet facilities and car park spaces. It is too early to comment on whether the funding has enabled grantees to increase the number of young people they are working with due to many of the builds or refurbishments not being completed. However, grantees did expect the number of young people attending their organisation to increase and, in some cases, the profile of young people to become more varied because of the changes made to their build or refurbishment. For example, having larger buildings meant that grantees had more space to deliver additional activities and some grantees had built specialist facilities such as a music room or theatre space that young people could use. Some of the grantees were expecting the changes made to their build or refurbishment to allow for a more inclusive space to enable greater diversity among the young people attending. For example, to better include people with health conditions and diverse ethnic backgrounds.

"The new building will have a separate chill out room, so that can be used to relax and help children with mental health issues."

Grantee

7 Lessons learned

A key challenge faced in delivery of the fund has been the short timescales for grant distribution and requirement that projects complete by the end of March 2025. The processes and systems for the fund were set-up by the IGM within the available timescales and they have worked at pace to ensure successful allocation of the funding. The timescales limited the time available for development and set up prior to implementation and have meant that some tasks have been delivered in parallel, that would ideally have been sequential. The initial focus on ensuring that grants could be awarded in the timescales meant that processes and support for later phases of the grant making have necessarily been deprioritised until earlier aspects have reached a steady state. The IGM have demonstrated a willingness to pause, reflect and iterate to learn and continuously improve. It is notable that the IGM processed over 1,000 applications within the timeframes and have put in place a diverse Central Support Offer to strengthen grantees' delivery.

This chapter draws together lessons learned during delivery for DCMS and the IGM based on the interim evaluation findings presented in this report to inform future funds. It focusses on the aspects of the evaluation hypotheses in scope for this interim evaluation, which primary focus on the application and assessment processes, but also include early grant management.

7.1 Setting up and promoting the Fund

The IGM and DCMS effectively disseminated information about the funding opportunity through a wide range of channels. The number and monetary value of applications to the fund was indicative of the need and level of demand for the investment in the context of a shrinking youth sector over the previous decade.

The evaluation identified lessons associated with the set-up and promotion of the fund that would be useful for DCMS to consider in future funds.

- **Pre-construction grants available from the outset of the fund would have helped to level up the playing field for applying.** The costs of applying to the fund were considerable for some, especially smaller and volunteer-led organisations. While pre-construction grants were valuable in enabling some organisations to develop effective investment plans, this funding could have been more widely advertised and made available as a pre-cursor to the fund's main application process, alongside support and guidance from Relationship Managers. Without this pre-construction phase, successful applications were concentrated amongst those who were most ready to engage which may not always have been those with highest levels of need.
- **Comprehensive fund eligibility criteria would have helped prevent 371 ineligible applications being submitted.** Preventing this scale of ineligible applications would have enabled more efficient and effective use of IGM and applicant staff time and resource. Central to this would be having a working definition of open access youth work in place from the outset. There was no agreed government or sector definition of open access youth work when the fund was launched. The IGM drafted a definition part way through the application window and published this in January 2023. Future interventions targeted at organisations delivering open access youth work should have a clear definition of this from the outset that can be understood by applicants operating in different contexts. Having a definition in place from the outset would have helped minimise the volume of ineligible applications that did not meet this criterion.

- **Include eligibility criteria for the building or site.** IGM staff and applicants suggested that factors such as building ownership or having a long-term lease on the site ought to have been included as fund eligibility criteria.
- **Creating clear programme guidance about what the revenue and capital money could fund to help applicants understand what they could use this for.** There was a lack of clarity among applicants about what revenue funding could be used for. Specifying this clearly in the fund programme guidance, alongside more details on what capital funding could be used for, would have aided applicants in the development of their bids. This would support effective grant management by ensuring that grantees are fully clear on which aspects of projects they could claim funding for.
- **The importance of environmental sustainability, and how energy efficiency would be assessed, could be included in the application guidance to help meet environmental aims.** Applicants perceived mixed messages about the degree of emphasis on environmental sustainability in the fund. More guidance on this would have supported applicants to know how best to integrate sustainable capital features into their projects and the range of energy efficient options. Future fund guidance could include examples of environmentally sustainable features, the costs, and projected longer term financial and environmental benefits, alongside how energy efficiency would be assessed during the application process. Environmental sustainability could be considered a fund assessment pillar for future funds that have this aim to signal its importance to potential applicants.
- **Support consistent engagement across local authorities with the youth sector.** Local authorities were an important source of awareness and support for applicants. Significantly fewer applicants in the Northeast region had heard about the Fund via a local authority than in the Northwest, the region which generated the highest volume of successful applicants. For future interventions with a local or regional geographical focus, greater consideration could be given as to how best to work with local authorities to support them to promote and encourage applications, acknowledging the variation in the extent to which local authorities view youth services as a priority.

The evaluation also identified lessons from the set-up and promotion of the fund for IGMs of future funds.

- **Clearly communicating to applicants about when in the application process planning permission is required.** Regardless of when applications were submitted, fund timeframes required projects to complete by March 2025. Over time, the critical point at which planning permission was required for an application to remain feasible within the fund timeframe changed. A lack of communication about cut off points for planning permission contributed to a sense of confusion among some unsuccessful applicants about whether their application was ineligible or unsuccessful due to not having planning permission.
- **A clear map of the application process detailing what is required at each stage, with indicative timelines, to help helped applicants plan for and manage the resource required for their application.** Organisational capacity for bidding varied between applicants. Some were not always able to meet short notice requests for additional information and felt disadvantaged if they were not able to prioritise the application at short notice. Smaller and volunteer-led organisations found this particularly challenging.

7.2 Assessment and selection

The assessment and selection of applicants was undertaken at pace to ensure the timescales for distribution of the funding could be met. The IGM processed a substantive number of applications within a relatively short timeframe. They aimed to select grantees that were organisationally resilient and well-placed to deliver capital projects within the timescales of YIF2. The applicant survey data suggests that this has been the case as successful organisations were more likely than unsuccessful applicants to have key aspects of good organisational management, such as a financial plan, a business plan, a recruitment plan and volunteer management strategy.

There were lessons identified from the assessment of applicants and selection of grantees for both DCMS and the IGM to inform future funds.

Lessons for DCMS included:

- **Give consideration to setting indicative or minimum levels of funding per region.** While all eligible local authority areas received some funding, it was unevenly distributed between regions. Some regions, including the Northeast, were underrepresented in the final allocation of funding whilst others were overrepresented. The concentration of funds within some priority areas may create disparities in the extent to which YIF2 contributes to increasing access to youth facilities across all eligible areas. Given the timescales, funding went to organisations in areas that held property and were able to mobilise quickly.

Lessons for the IGM for future funds in relation to assessment and selection included:

- **Communicating criteria on how applications will be assessed to maximise the perceived transparency of the selection process.** Greater transparency about the award criteria supports perceptions among applicants that the assessment process is transparent.
- **Future funds could allocate more resource to providing feedback to applicants against assessment criteria.** There was low satisfaction among unsuccessful applicants with their application feedback. A lack of clarity about the reasons for being unsuccessful, and constructive and tailored feedback on applications, created confusion about whether an application was unsuccessful or ineligible. Unsuccessful applicants wanted constructive feedback and learning to support future applications. In the absence of this clarity, unsuccessful organisations sometimes assumed reasons such as because funding for their region had already been allocated to neighbouring organisations.
- **Consider how best to meaningfully engage young people within the time available.** The Young Assessors Panel had a role in the assessment process. However, the tight timescales for assessing bids and distributing grants meant that they were limited in the extent to which they could be meaningfully involved. This could be overcome by either having more time for the assessment process to ensure that young people can be fully involved or facilitating youth engagement in a way more compatible with the timeframes. For example, applicants demonstrating they have engaged their own young people in the bid development process, rather than having a separate youth panel.
- **Recording good quality programme data on applicant eligibility and reasons for being unsuccessful.** Establishing the recording of programme data on reasons for ineligibility separate

to reasons for being unsuccessful helps enable clear and detailed feedback to applicants and supports effective monitoring of fund progress.

- **Seeking ways to ensure the continuity and consistency of advice provided by Relationship Managers to applicants, particularly in the early stage of the fund.** The extent to which Relationship Managers supported development of applications was perceived as having provided some organisations an advantage over others at times. Applicants felt they were disadvantaged where their Relationship Manager changed partway through the application process.
- **Communicating to grantees the requirements of the due diligence process in advance.** Following notification of a successful grant award, the due diligence process often took longer than expected and posed a risk to the delivery of projects on time. It also posed a risk to projects delivering within budget as some initial construction quotes had expired. As with the application process, grantees felt that the requirements for the due diligence process should be more clearly communicated at an earlier stage.

7.3 Grant management

The strength of relationships between grantees and Relationship Managers provided a good foundation as projects moved into delivery. In general, grantees felt relationships were open and that they were able to have honest conversations with Relationship Managers about challenges and felt supported by them.

Lessons learned for an IGM of future funds in relation to grant management included:

- **Ensuring effective processes for handover and continuity for grantees when Relationship Managers change.** Some staff change is inevitable, but the critical role Relationship Managers have meant that changes can significantly affect grantee experiences. Processes to ensure effective handovers and continuity of support for grantees when staff change and/or during periods of absence are important in ensuring consistency of support for grantees. This is consistent with applicant experience in the assessment and selection process noted earlier.
- **Ensuring grantees have clarity about what will be asked of them in relation to fund monitoring and reporting requirements.** Given their experience of the application and assessment process, where last minute changes and requests were common, grantees were concerned that what would be asked of them might change or vary during delivery as grant management information requirements were felt to be evolving. Written documentation could also be helpful to consistently communicate key pieces of information to all grantees, so they feel secure that the communication represents the fund-wide position.
- **Making the Central Support Offer available in time to support grantees who receive funding in the first phases.** There were examples of grantees nearing completion before the support was made available or who had been unable to benefit from this at the right stage of their build or refurbishment. However, the nature and type of support that is now available to grantees through the Central Support Offer is notable and a strength of the fund.
- **Ensuring Relationship Managers have technical construction knowledge or can work with colleagues to access technical construction support.** While grantees valued the support from Relationship Managers, they suggested that it would have been improved if they had greater

construction expertise, reflected also in the high total value of the Central Support Offer funding building project management. The appointment of construction sector specialists (Turner and Townsend) was welcomed, but it would have been helpful if they could have worked alongside Relationship Managers from the outset to provide that expertise.

8 Technical appendix

8.1 Programme Theory of Change (ToC)

A scoping and familiarisation phase was undertaken to inform the design of an integrated evaluation approach and the ToC. This involved the following activities:

- **Desk review** –of relevant background documentation on the YIF2, including documentation relating to the business case, an initial ToC, grant application forms, and assessment guidance.
- **Familiarisation consultations** –with stakeholders from the Department for Culture, Media, and Sport (DCMS) and representatives from the Intermediary Grantmaker (IGM) consortium including Social Impact Business (SIB), Key Fund, Resonance, and National Youth Agency (NYA). Representatives from the Department for Work and Pensions (DWP), and the Department for Education (DfE) were also engaged given their interest in the policy area.
- **Stakeholder workshops** – a draft of the ToC was shared and discussed at a workshop.
- The **Young People’s Advisory Group** (YPAG) provided feedback on the ToC in September 2023. The group focused on the elements relating to outcomes and impacts for young people, staffing and volunteers.

This resulted in the overarching programme hypothesis (Box 8.1)

Box 8.1 Overarching programme hypothesis

The Youth Investment Fund 2 will fund organisations in ‘left behind’ areas of England to **create, expand and improve** local youth facilities.

New infrastructure will provide organisations with physical assets that can be leveraged to generate additional sources of funding.

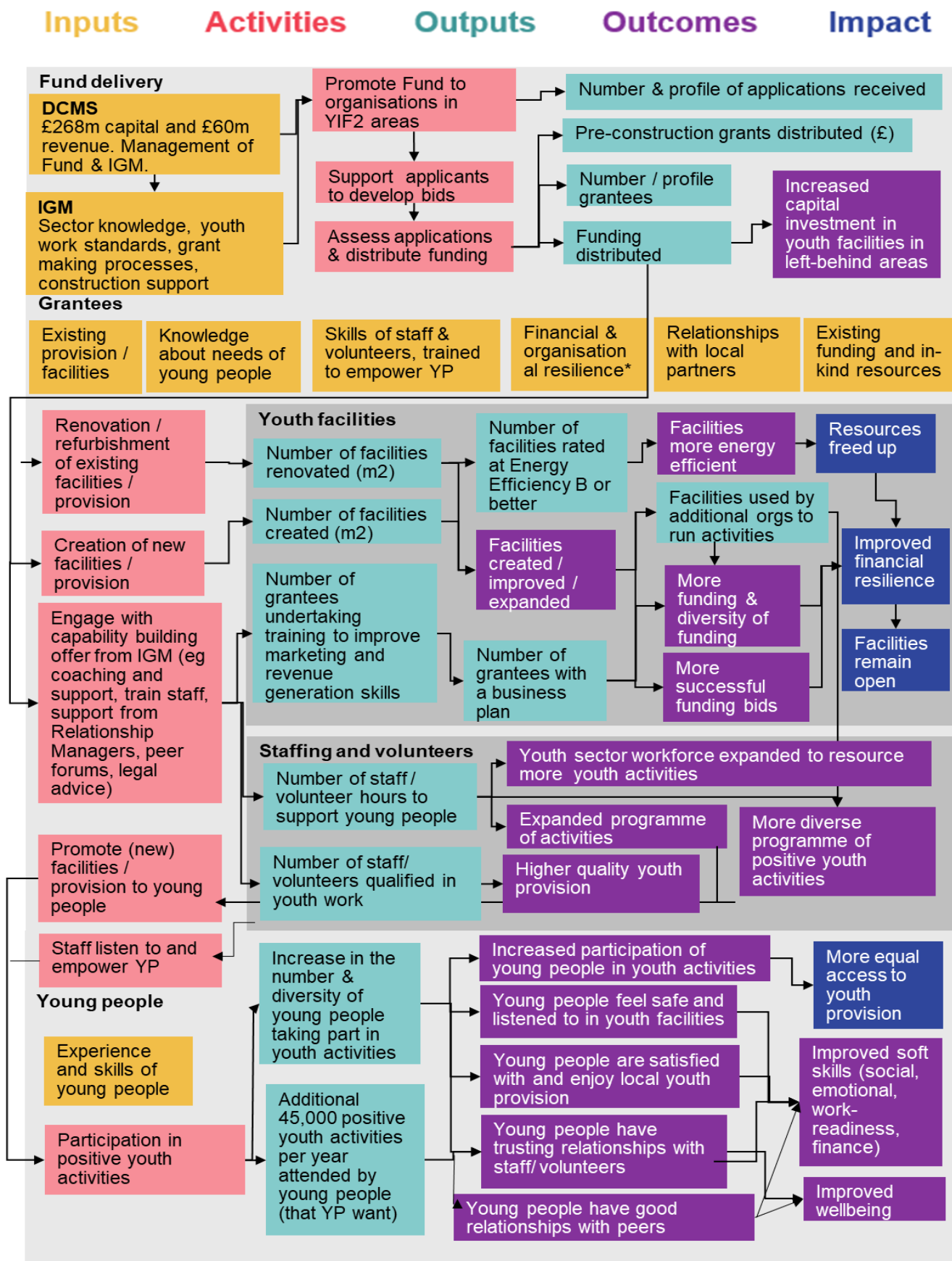
Updated infrastructure will achieve savings on facility running costs, making more resources available for activities that enrich the lives of young people.

YIF2 will increase access to youth facilities and positive youth activities²⁵ for young people in target areas. This will lead to positive outcomes for young people including improved mental and physical wellbeing, and skills for life.

The causal chains in the ToC (as shown by the pathway arrows in the logic model) describe how the programme intends to achieve its aims (Figure 8.2). These chains can be framed as a set of hypotheses that will be tested through the evaluation.

²⁵ This measures each activity a young person takes part in. Activities are measured (rather than young people) to mitigate double counting of those who take part in multiple activities. The evaluation will explore the types of positive youth activities delivered in YIF2 facilities.

Figure 8.2 Logic Model for Youth Investment Fund 2 (YIF2)



Evaluation hypothesis: Grant maker

The selected IGM and their partners bring sector knowledge and expertise in distributing grants to the voluntary and community sector, as well as an understanding of youth work standards and construction support. The IGM provides support to applicants at the application stage to meet the required standards and threshold for success.

The IGM has developed an assessment process focused on three pillars.

- The first pillar focuses on **organisational resilience**, including core due diligence.
- The second pillar assesses the **viability of the capital project**.
- The third pillar is focused on the **youth offer**.

Key outputs of these fund-level activities of the grant maker include:

- Number of applications received from organisations in priority areas (by YIF2 area, and development type (eg small refurbishments, renovations, mid-scale builds, large builds))
- Number and value of pre-construction grants distributed.
- Number of successful applications and profile of grant holders.
- Value of funds awarded to grant holders and split between capital and revenue funding.

These inputs, activities, and outputs intend to lead to **increased capital investment in youth facilities** in priority areas.

This resulted in the identification of the following grant making hypotheses in scope for this report.

Grant Maker Hypothesis 1 - Promoting the Fund

The IGM and DCMS will effectively promote YIF2 to suitable and eligible organisations across the target geographical areas. The methodology set by government for identifying eligible areas will enable applications from youth organisations and partnerships in Levelling Up priority areas.

Key assumptions to be tested in the evaluation:

- *There is sufficient demand for youth facilities / renovations in YIF2 areas.*
- *Organisations in YIF2 areas have the capacity and capability to apply for capital funding (in the available timeframes).*
- *The places selected for YIF2 funding are those with greatest need of youth provision.*

Grant Maker Hypothesis 2 – Grant holder assessment and selection

The IGM selects grant holders that are organisationally and financially resilient and will be well-placed to deliver capital projects within the timescales of YIF2. Selected grant holders will have the governance, leadership, capacity, and financial management to deliver a capital project. Grant holders will have diverse revenue streams and the capacity and capability to deliver quality youth activities that young people in their communities will want. Funding will be distributed across selected areas.

Key assumptions to be tested in the evaluation:

- Building plans and planning permission guidance are fit for purpose and accessible to youth sector organisations.

-The allocation of funding minimises potential duplication of YIF2 funding within local areas.

-Funding is distributed to organisations across all target areas.

Evaluation hypothesis: Grant holders: youth facilities

Grant holders bring knowledge on the needs of young people in their local area, skills and expertise of staff and volunteers in youth work and provision, existing youth provision and facilities, in-kind and other sources of funding (including those used for match or further funding the capital development), and existing relationships and networks with partners to the delivery of the grant. Grant holders should have sufficient organisational capability and financial resilience to deliver their proposed use of the funding. The IGM assures this during the assessment process, including through an assessment of core due diligence, and the organisations' recent financial performance and financial management. Aspects relating to training staff and volunteers have been included in relation to youth facilities as a qualified workforce can be viewed as an organisational asset.

The IGM intends to support grant holders to build their capability and expertise to raise funds, specifically through training to develop marketing and revenue generation skills, and to develop (or revise) business plans. Delivery of this support will be led by the National Youth Agency (NYA). It is expected to result in grant holders being able to increase their funding, and diversity of sources of funding, to sustain the running of their buildings and delivery of youth activities beyond the lifetime of YIF2.

Reflecting on of the main objectives of YIF2, it is expected that grant holders will use the funding and support from the IGM to:

- Create, expand, and improve local youth facilities.
- Improve the energy efficiency of youth facilities.
- Improve the diversity of their funding sources through successful funding applications which, in combination with more energy efficient buildings, will strengthen their financial resilience to ensure that the new / improved youth facilities remain open in the long-term (beyond the timeframe of the evaluation).

This resulted in the identification of the following grant holder hypotheses in scope for this report.

Grant holder hypothesis 1: Creating new / improved youth facilities.

Selected grant holders will successfully deliver a capital project in the YIF2 timeframes, resulting in 300 capital investments. Grant holders will be well supported by the IGM to enable the successful completion of the capital projects within the timeframes. These facilities will then be used to deliver a greater volume and / or diversity of youth activities.

Key assumptions to be tested in the evaluation:

- *There is unmet need and demand for youth facilities in the priority areas.*
- *Youth organisations can foresee and manage risks associated with the construction.*

- *The IGM provides support through Relationship Managers who work proactively with grant holders and intervene early to help resolve challenges.*
- *The IGM creates opportunities for grant holders to share ideas and learning to overcome common challenges associated with the managing the capital investment and ensuring it's sustainability.*
- *There is sufficient capacity in the construction sector to deliver the projects to time (including any Modular buildings).*
- *Construction materials can be sourced within project timescales and costs for these remain manageable within project budgets.*

Grant holder hypothesis 2: Energy efficient facilities

The new and upgraded YIF2 facilities will be energy efficient (rated B or better). Pre-existing facilities will be more energy efficient than in the previous year, leading to decreased/ lower running costs and lower maintenance costs. This will free up financial resources for other uses. Youth facilities will have a reduced Carbon Footprint (measured beyond the timescales of the evaluation).

Key assumptions to be tested in the evaluation:

- *Efficient buildings will lead to cost savings which frees up resource for youth organisations to use to deliver more activities. For example, by employing more staff, or delivering a wider range of provision.*

Grant holder hypothesis 3: Increased capability to raise funds among grant holders.

Grant holders will participate in training and support, such as opportunities delivered by the IGM. This support will effectively develop the marketing skills and capabilities of grant holders to undertake business planning and business development. This will result in them being able to generate more diverse funding sources, including revenue generated by other youth organisations using the facilities and through more successful funding bids.

Key assumptions to be tested in the evaluation:

- *Grant holders are motivated and able to participate in training and support delivered by the IGM and other providers.*
- *Through training provided by the IGM and possibly other sources, and business planning, organisations have the capability and resources to raise funds and promote the improved / expanded facilities for use by partners.*
- *The training and support from the grant maker is of sufficient quality to support the development of marketing and business planning skills.*
- *There are sufficient sources of other revenue available for organisations to access.*
- *Funding is not displaced / diverted from other local youth services to support YIF2 facilities.*
- *New infrastructure attracts engagement and investment from other sources (eg school enrichment activities) and supports new partnerships.*

Evaluation hypothesis: Staff and volunteers

Some grant holders will use YIF2 revenue funding to increase their capacity and capability. All grant holders will be supported by the IGM to ensure that there are sufficient staff and volunteers to deliver positive youth activities in the new / improved youth facilities.

The quality of youth activities delivered will be critical to achieving intended outcomes for young people. There is an intention that every YIF2 facility will have at least one worker/volunteer trained to a recognised Level 1 or 2 qualification in youth work within 12 months of opening. The IGM will work with grant holders to ensure this. It will contribute to professionalising the youth sector workforce, leading to an increase in quality youth activities. The fund is also expected to contribute to an expanded youth sector workforce as YIF2 grant holders hire more staff and volunteers.

This can be translated into two key hypotheses focused on staff and volunteers to be tested in later phases of the evaluation.

Staff and volunteer hypothesis 1: Youth sector workforce capacity

Grant holders will increase their paid or volunteer workforce to expand the number of activities offered to young people.

Key assumptions to be tested in the evaluation:

- *Recruiting more volunteers will enable youth organisations to run more positive activities for young people.*
- *Organisations need to expand staffing / volunteers to deliver more activities.*
- *Local communities are willing to volunteer.*
- *Youth workers can be recruited.*
- *Staff are not displaced from other facilities in the area, contributing to an increase in the overall youth sector workforce.*

Staff and volunteer hypothesis 2: Youth workforce training and qualifications

The paid / volunteer workforce will become more qualified, leading to better quality provision and activities.

Key assumptions to be tested in the evaluation:

- *Providing capability building and training for staff and volunteers will lead to higher quality services for young people, which will in turn lead to better outcomes for young people.*
- *Youth organisations can resource training / qualifications costs from other funding sources.*
- *Training can be completed within the timescales of the fund.*
- *Volunteers have the time and willingness to train.*

Evaluation hypothesis: Young people

Young people are expected to indirectly benefit from YIF2 through new and expanded youth facilities, and access to a greater range of positive youth activities. Grant holders will undertake activities to

engage young people and communicate the new offer. Grant holders are expected to deliver a programme of positive youth activities which will lead to the following outputs:

- An increase in the number and diversity of young people taking part in youth activities.
- An additional 45,000 young people taking part regularly positive youth activities²⁶ per year.

As a result of the new facilities and activities on offer within these, young people in YIF2 areas are expected to:

- **Feel safe and listened to** in youth facilities.
- **Have good relationships with their peers.**

Regular (at least monthly) engagement and participation in positive youth activities will contribute to:

- Improvements in emotional/social / financial management skills for young people engaged in activities.

Beyond the evaluation timeframe, this participation will lead to a levelling up in access to youth provision across England. This led to two hypotheses that will be testing in later phases of the evaluation.

Young people hypothesis 1: Engagement

Young people will hear about the new, expanded, or improved youth activities available. They will feel motivated and able to take part in activities. Young people will take part regularly (at least monthly) in an additional 45,000 positive youth activities per year.

Key assumptions to be tested in the evaluation:

- *Young people feel welcome and safe to attend the facility and supported to fully participate in the activities.*
- *Activities are open to all, accessible and inclusive. Young people can easily reach the facilities and barriers to them attending are overcome.*

To result in the intended outcomes for young people, the activities they engage with should be high-quality and meaningful, underpinned by the qualities of open youth work.

Young people hypothesis 2: Taking part in positive youth activities.

²⁶ Positive youth activities are defined as activities delivered aligned to the principles of open youth work from the YIF2 facilities. The measure captures activities delivered; not unique young people engaged. Therefore, the same young person may participate in more than one activity. Regular is defined as including both programmatic and rolling activities, and open to young people more than once a month. They can be both fixed and open-ended in timescale.

Taking part in positive activities that youth organisations deliver in new / improved facilities will lead to positive changes in young people's wellbeing and development of soft skills.

Key assumptions to be tested in the evaluation:

- *By creating facilities and engaging activities for young people, they will feel safe and empowered. This security will foster participation and engagement and will increase wellbeing and develop personal and social skills.*
- *Young people attending youth activities will maintain and build, trusted relationships with youth staff/volunteers and their peers. These relationships will contribute to improving their wellbeing and social and emotional skills.*

8.2 Qualitative data collection and analysis

To address the evaluation research questions, the views and experiences of a range of participants were sought, including YIF2 DCMS Programme staff, key staff members within the IGM, and including representation from Relationship Managers, the Grants Committee and Assessment Panel. YIF2 successful, unsuccessful, and ineligible applicants were all represented.

Phase one fieldwork was conducted between 3rd August and 11th October 2023 and phase two fieldwork between 1st April and 10th June 2024. Participants were recruited by a specialist recruiter. A total of 109 in-depth qualitative interviews have been conducted to date. Interview discussions followed discussion guides, depending on the type of participant, which were developed by Ipsos researchers with contributions from DCMS.

The interviews sought to gather perspectives on the application and assessment processes and the distribution of the fund to provide evidence on:

- Organisations' perceived capacity and capability to successfully apply for the funding
- The perceived need for capital investment in youth facilities in participants' local area
- Organisations' ability to match-fund and deliver a capital investment programme
- Feedback on the support and guidance provided during the application and selection process.

In phase two, in addition to the application and assessment processes, the interviews covered the grant management process, the Central Support Offer, the new youth facilities, energy efficiency and organisational sustainability to gather evidence on:

- The due diligence process and how the grant management process works
- The support grantees received from Relationship Managers and the wider Central Support Offer
- To what extent the projects have been delivered as originally intended at the application stage
- Whether energy efficiency improvements have been made to buildings and if this has reduced costs
- In what ways, if any, have grantees been planning for organisational sustainability

The sampling approach adopted aimed to ensure a range of views and experiences were captured across the evaluation, across the different applicant groups including region. Target and achieved numbers for the phase one and phase two qualitative data collection of applicants, by group, are set out in Table 8.3 below.

Table 8.3 Qualitative data collection sample

	Minimum target	Achieved	Achieved
Ineligible		Phase one	Phase two
<i>Region</i>			
East Midlands	1	2	N/A
East of England	1	2	N/A
London	1	1	N/A
North East	1	1	N/A
North West	1	2	N/A
South East	1	3	N/A
South West	1	1	N/A
West Midlands	1	2	N/A
Yorkshire and Humberside	1	2	N/A
Total		15	N/A
Grantee quotas		Phase one	Phase two
<i>Legal type</i>			
Local Authority	4	5	1
Company limited by guarantee	4	9	7
Charitable Incorporated Organisation (CIO)	4	3	5
Other	2	2	2
Unincorporated organisation	1	1	2
Community Interest Company (CIC) limited by guarantee	2	3	3
Industrial & Provident Society	1	1	-
Company limited by shares	1	1	-
<i>Region</i>			
East Midlands	2	-	1
East of England	2	3	2
London	2	1	-
North East	2	8	4
North West	2	2	4
South East	2	3	3
South West	2	3	1
West Midlands	2	3	3

	Minimum target	Achieved	Achieved
Yorkshire and Humberside	2	3	2
Project Type			
Large scale construction - Above 600sqm	2	4	2
Mid-scale construction - 350 to 600sqm	2	2	1
Multi-site	2	4	1
Refurbishment	2	7	9
Renovation and extension	2	7	4
Small scale construction - Under 350sqm	2	2	3
Total		25	20
Eligible unsuccessful quotas			
Reasons why unsuccessful		Phase one	Phase two
Insufficient Evidence - Unable to assess	4	4	2
Withdrawn - Other	2	2	-
Application does not meet stated fund priorities as closely as others	2	4	3
Total			

8.3 Baseline survey

Applicants were sampled at two time points and invited to take part in the survey as part of cohort 1, which took place between August and October 2023, or as part of cohort 2, who were invited to take part between January and April 2024. Cohort 1 had received a decision on their application as either successful or unsuccessful between August 2022 and June 2023, whereas those who took part in Cohort 2 received their decision later, from June 2023 onwards. There were different email invites used for successful and unsuccessful applicants, and once fieldwork had started, alternative email text was used if applicants had started but not yet completed the survey.

273 applicants were invited to take part in Cohort 1 during the initial launch of the survey, made up of 111 successful applicants and 162 unsuccessful applicants. The initial email was sent on Friday 4th August, with a first reminder email sent on Wednesday 23rd August, a 2nd reminder email sent on Tuesday 12th September and a final email invitation sent on Tuesday 10th October 2023. Emails were sent into September and October due to us receiving many out of office alerts over summer holidays when initial emails were sent in August.

The email invitations were supplemented by telephone reminder calls to those yet to respond to the survey invites, with a mini questionnaire asking participants if they had received the invite to take part, whether it was sent to the right contact at each youth facility, providing them the opportunity to update contact details and forwarding them another email invitation at the close of the call.

The survey remained open between Cohorts 1 and 2, although no further email invitations were sent during the period between the final reminder on 10th October 2023 and the relaunch of the survey in January 2024.

An additional 416 applicants were invited to take part in Cohort 2, as well as recontacting those who had not yet taken part in Cohort 1. The initial email was sent on Wednesday 17th January 2024, a first reminder on Tuesday 30th January 2024, a second reminder on Thursday 8th February 2024 and a planned final reminder on Thursday 15th February 2024. We received feedback from some applicants that they did not yet feel able to complete their surveys with regards to certain questions related to their application as they were going through the due diligence process ahead of receiving their grant. We paused reminder emails but kept the survey open and sent one final reminder email to all applicants yet to complete on Monday 15th April 2024, extending the closing date of the survey to be 22nd April 2024.

Due to the extended fieldwork period, we were able to adopt a reminder strategy that included multiple invitations to take part, spread over a longer period. The final reminder issued on the 15th April clearly indicated that it was the last opportunity to take part and that fieldwork would close permanently one week later.

By the close of fieldwork, we had received 389 completions, made up of 182 successful applicants and 210 unsuccessful applicants. Response rate was particularly strong amongst successful applicants (70%), although almost half of unsuccessful applicants (49%) also responded to the survey. Overall response rate was 57%. This response rate is a strength of this data collection and helps to make reported figures more reliable.

During Cohort 1, unsuccessful applicants were offered an incentive of £40 to either their organisation or a charity of their choice. This incentive was increased to £75 in Cohort 2. Successful applicants were informed that their response to the survey was a requirement as part of their grant application.

We were unable to weight the survey to multiple metrics due to unreliable programme data available in Monitoring Information. Many variables were incomplete and included blanks for both successful and unsuccessful applicants and so could not be reliably weighted to as part of the data analysis. As the sample size is relatively small, weighting to any metric that includes blanks would lead to biased results that do not accurately reflect the views of the population.

It was decided to weight to two individual metrics that were complete and existed for every applicant. These variables were 'grant amount requested' for unsuccessful applicants and 'grant amount received' for successful applicants. This meant we were able to weight for these two variables so that responses to the survey more accurately represented the size of youth facility, as typically larger organisations would have applied for, or received, more funding. Weighted and unweighted sample profiles for successful and unsuccessful applicants can be found in the table below.

Table 8.3 Weighted and unweighted sample profile for applicant survey

Region	Population figures (%)	Sample – unweighted (%)	Sample – weighted (%)
Grant amount received (successful)			
£50,00 and under	18.9	18.7	18.9
£50,001 - £100,000	10.7	8.2	10.7
£100,001 - £250,000	20.7	14.8	20.7
£250,001 to £1m	19.3	22.5	19.3
£1,000,001 to £3m	22.6	25.8	22.6
Over £3m	7.8	9.9	7.8
Grant amount received (unsuccessful)			
£50,00 and under	10.9	13.3	10.9
£50,001 - £100,000	8.8	10.0	8.8
£100,001 - £250,000	21.3	30.5	21.3
£250,001 to £1m	31.8	27.1	31.8
£1,000,001 to £3m	17.0	11.0	17.0
Over £3m	10.3	8.1	10.3

8.4 Youth Sector Advisory Groups (YSAG)

In webinars grantees were introduced to the independent evaluation of the YIF2. A representative from the YMCA George Williams College (the College) outlined the Young People's Advisory Groups (YPAG), explaining to grantees what taking part in the groups would involve for them, as organisations, and the young people they support. The support on offer from the College for those who chose to host a YPAG was also described.

During the webinars, a virtual poll was launched. The poll asked grantees if they were either interested in hosting a YPAG, might be interested but would like more information or were not interested. Thirty-one grantees responded to the poll stating that they were either interested or might be interested but required further information. Following the webinar, the College sent an email to the thirty-one grantees who suggested they were interested or required more information inviting them to discuss the opportunity further. Seven grantees responded, and an MS Teams call was set up with each grantee to explain the opportunity in more detail, understand more about the interested grantees to inform the selection and answer any questions they had.

Three YPAGs have been held so far. Table 8.4 provides an overview of the organisation characteristics.

Table 8.4 Grantee organisations interested in the Young People's Advisory Groups

Region	Type of organisation	Staff/ volunteer numbers	Type of youth work
North East	CIC	40	Group work

Region	Type of organisation	Staff/ volunteer numbers	Type of youth work
South West	Local Authority	19	Targeted
South East	Local Authority	-	Targeted

Workshop One: North East, 21st September 2023, 5.00-6.30pm

The first YPAG met on the 21st September 2023, to provide feedback on the Youth Investment Fund's (YIF2) Theory of Change (ToC).

Eleven young people aged between eleven and nineteen years old participated in the workshop. The group was diverse in terms of age, physical ability, and neurodiversity, and was made up of three males, seven females and one young person identifying as non-binary.

The young people were introduced to the idea of ToC through a series of activities. These activities were designed to familiarise them with the key concepts and components of ToC.

Once the facilitators felt confident that young people understood the basics of ToC, they gave young people copies of the YIF2 ToC and asked them for their opinions on the model, focusing on outcomes relating to young people.

Workshop two: South West, 11th October 2023, 5.00-6.30 pm

The second YPAG met on the 11th of October 2023, to provide feedback on key evaluation tools for the independent evaluation of the Youth Investment Fund (YIF2).

Eight young people aged between eleven and twenty-two participated in the second YPAG workshop.

All of the young people present identified as White British. However, the group was diverse in terms of age, physical ability and neurodiversity, and was made up of six females and two males.

The group provided insight on the draft survey of young people and a supporting recruitment letter aimed at young people. Due to the length of the survey, the workshop covered key questions of interest to the evaluation team.

Workshop three: South East, 6th March 2024, 3:30-5:50 pm

The third YPAG met to provide feedback on draft interview and focus group topic guides designed for use with young people during case study visits as part of the independent evaluation of the Youth Investment Fund 2 (YIF2).

Eleven young people aged between twelve and sixteen years old participated in the YPAG workshop. The group was diverse in terms of age and neurodiversity and was made up of four males, four females and three young people identifying as trans or non-binary.

8.5 Youth Sector Advisory Panel (YSAP)

During the grantee webinars the College presented the Youth Sector Advisory Panel opportunity to grantees. The role of the panel in supporting the evaluation was outlined as well as how grantees could apply for the opportunity. Nine individuals responded to the EOI. All nine demonstrated good knowledge of the youth sector and a range of experience, interests and skills such as survey design, measurement

and impact and a history of working in marginalised communities. They also represented a good geographic spread and a range of organisations in terms of type and size, see Table 8.5.

Therefore, all nine were invited to be part of the YSAP. Everyone accepted but unfortunately, one member had to pull out due to health circumstances leaving eight members of the YSAP.

Table 8.5 Youth Sector Advisory Panel

Job title	Type of organisation	Staff/ volunteer numbers	Region	Type of YIF2 project
Director of youth and community	Registered charity	240	South West	Mid-scale
Youth Programme Manager	Not for profit company	30	South East	Large-scale
Co-Director	CIC	32	North East	Unsure
Youth Services Project Manager	Charitable incorporated	100	West Midlands	Mid-scale
CEO	Registered charity	14	South East	Large-scale
Data and Policy Analyst	Registered charity	8500	National	Large-scale
CEO	CIC	2023	West Midlands	Mid-scale
Community Youth Manager	Local Authority	19	South West	Multi-site

The YSAP had met twice by June 2024. In meeting one the group discussed and gave insight on the College's offer of capacity-building support, the draft survey of young people and the draft letter for parents and carers planned to accompany the survey of young people.

In meeting two, they provided reflections on the interim report findings, discussed updates to the Theory of Change (ToC), gave views on how the interim findings could best be shared with grantees and unsuccessful applicants more widely, and discussed how the evaluation team should approach offering online courses as part of the capacity building offer.

8.6 Full evaluation framework and hypotheses

Key policy questions

Process strand:

- Which organisations applied for the fund, what funding was given and to whom?
- Were facilities delivered on time, within budget, to specifications, and within specified locations?
- What are stakeholders' views of the fund, it's set up and how it has been delivered?
- How many positive youth activities are being provided in YIF facilities?
- What factors affected the delivery of the fund?
- What do young people think about the YIF funded facilities and the activities delivered in them?

Impact strand:**In relation to a comparison group:**

- What outcomes have been achieved through the YIF2?
- How energy efficient are the YIF funded facilities?
- What is the financial security and sustainability of YIF supported facilities/organisations to continue to run positive activities for young people?
- Is there a change in young people participating in youth activities in YIF areas?
- What are the short-term outcomes for young people attending YIF facilities?

Value for money strand:

- Did YIF2 provide value for money?
- What was the most cost-effective type of funding provided?
- What was the cost to benefits ratio for YIF2?

Table 8.6 Full evaluation framework

Evaluation strand	Evaluation hypothesis (where applicable)	Specific ToC component	Example data collection questions <i>These will be adapted for survey and/or qualitative approaches.</i>
Process	Grant Maker hypothesis 1	Promotion of fund; Support for applicants to develop bids <i>Activity</i> Applications received and success rate <i>Output</i>	• How effective were the processes for promoting YIF2 and engaging eligible organisations? • How did applicants find out about YIF2? How clear were communications about the eligibility criteria? • Which organisations applied to the fund? Why did ineligible organisations apply for the Fund? • What was the success rate for applicants? • What were the enablers / barriers to applying for funding? How did applicants experience the process, including the support received from the IGM to develop their bid? • Were any types of organisations (and YIF2 areas) were over / under-represented in the applications? What types of organisations did not apply? How did this vary by region?
Process	Grant Maker hypothesis 2	Assessment of applications <i>Activity</i>	• How effective and timely were the processes for assessing YIF2 applications? • How clear was the eligibility criteria and how consistently was this applied? • How effective were the assessment processes (three pillars)? What (if any) modifications were made to these processes and why? • What were the reasons for rejecting applications, and what types of organisations were rejected? What are the lessons?
Process		Distribution of funding <i>Activity</i> Number/profile of grantees	• How timely and effective were the processes for distributing YIF2 funding? • How did these align with project delivery timetables / milestones? What worked well / less well and why in the distribution of funding? What are the lessons?

Evaluation strand	Evaluation hypothesis (where applicable)	Specific ToC component	Example data collection questions <i>These will be adapted for survey and/or qualitative approaches.</i>
		<i>Output</i> Amount and type of funds distributed <i>Output</i>	- How much funding was awarded in total? How were funds distributed by factors such as type of grant (pre-construction / capital / revenue), type of org, scale and nature of project, geographical location? - Were any types of organisations over / under-represented in the grant awards? How did grant awards vary by area/region?
Process		Grant management <i>Activity</i>	- How effective were the processes for managing grant awards? To what extent did these processes align with the good practice principles and approaches set out in the Government Functional Standard? - What were the views and experiences of grant holders / wider stakeholders on grant management processes? - How effective were the systems for monitoring and reporting YIF2 activity / delivery? - How did grant holders experience the grant management support? What worked well? What could have been improved?
Impact		Increased capital investment in youth facilities <i>Outcome</i>	- Did YIF2 result in an increase in capital investment in youth facilities within left-behind areas? - What levels of capital investment would grant holders have made in the absence of YIF2? Were any displacement / substitution effects observed and, if so, what were the implications of these?
Value for Money	Grant Maker hypothesis 2	Assessment of applications <i>Activity</i>	- How efficient and effective were the processes for assessing applications and distributing funds? - What could have been done differently / better to improve the efficiency and effectiveness of these processes?
Process	Grant holder Hypothesis 1	Renovation / refurbishment of existing facilities; Creation of new facilities / provision <i>Activity</i> New facilities renovated / created <i>Output</i>	- How far were YIF2 funded renovations / refurbishments delivered on time, within budget and to specifications? - What were the reasons for any variations in what was delivered relative to what was planned? What were the enablers / barriers to delivery of the new / refurbished facilities? How far were these relating to internal / external factors? - How effective was the role of the Relationship Managers / IGM in supporting successful completion of facilities? What worked well / less well and why? What are the lessons?
Process / impact	Grant holder Hypothesis 2	Facilitates rated at Energy Efficiency B or better <i>Output</i> Facilities are more energy efficient <i>Outcome</i>	- How and in what ways were the new / improved facilities made (more) energy efficient? What worked well / less well in improving the energy efficiency of the new / improved facilities? - Were pre-existing facilities more energy efficient than in previous years? Which types of projects / funded facilities were most / least energy efficient and why? What are the lessons? - Did improvements in energy efficiency result in a reduction in the running costs of pre-existing facilities? To what extent did this free up resources for grant holders to use to deliver more activities for young people? How far did it contribute to the improved financial resilience of organisations?
Process	Grant holder Hypothesis 3	Grant holders engage with capacity building offer from IGM /	What capacity building support was offered / delivered through the IGM? How / to what extent was this tailored to the needs of grant holders? What were the levels of engagement / take up of capacity building support amongst grant holders? What were the enablers / barriers to engagement?

Evaluation strand	Evaluation hypothesis (where applicable)	Specific ToC component	Example data collection questions <i>These will be adapted for survey and/or qualitative approaches.</i>
		other providers <i>Activity</i> Grant holders undertaking training to improve marketing / revenue generation <i>Output</i>	- What were the views and experiences of grant holders of the support offered / delivered? How relevant was this to their needs? - To what extent did grant holders engage in training to improve marketing and revenue generation? Where did they access this training (e.g. from the IGM/other providers)? What were the enablers / barriers to undertaking this type of training? What were grant holder views and experiences of this?
Impact	Grant holder Hypothesis 3	Grant holders with a business plan <i>Output</i> More funding and diversity of funding; more successful funding bids <i>Outcomes</i>	- How far did training and support accessed by grant holders contribute to them having new / improved business plans? - What were the enablers / barriers faced by grant holders in developing / improving business plans? What was the role of the IGM / other providers in supporting this? - Are grant holders generating more funding and / or funding from a wider range of sources as a result of their YIF2 grant? How and in what ways are grant holders generating more / different sources of funding (e.g. through more successful funding bids, revenue generated from other organisations using the facilities)? How / to what extent has YIF2 contributed to grant holders becoming more financially resilient and sustainable?
Value for Money			- How efficient and effective were the processes used by grant holders to develop / refurbish youth facilities? How were resources and materials procured? What measures were used to ensure value for money? What were the main drivers of costs (for which inputs were most resources spent)? Were inputs purchased at the lowest possible price? If not, why? - What were the enablers / barriers to efficiency and effectiveness in the procurement of suppliers and materials for construction projects?
Value for Money			Has YIF2 resulted in savings on energy costs for grant holders with pre-existing facilities? Could greater cost savings have been made? How have these cost savings been used?
Process	Staff and volunteer hypothesis 1	Number of staff / volunteer hours to support young people <i>Output</i>	- To what extent to did grant holders increase their paid staff / volunteer hours to deliver additional support to young people? - How and in what ways did grant holders increase staff / volunteer hours (e.g. through recruitment or additional hours for existing staff / volunteers)? - What were the enablers / barriers to increasing staff / volunteer hours to support young people?
Process	Staff and volunteer hypothesis 2	Number of staff / volunteers qualified in youth work <i>Output</i>	- To what extent did grant holders increase the numbers of staff / volunteers qualified in youth work? How and in what ways did they do this (e.g. through recruitment / training of existing staff or recruitment of new qualified staff)? - What was the role / contribution of the IGM in increasing numbers of qualified staff? What was the role of others (e.g. other training providers)? What were the enablers / barriers to increasing qualified staff / volunteers?
Impact	Staff and volunteer hypothesis 1	Expanded youth sector workforce <i>Outcome</i>	To what extent did YIF2 contribute to an expanded youth sector workforce to deliver more youth activities? Did recruitment add to the existing workforce within YIF2 areas or displace staff / volunteers from other youth facilities?

Evaluation strand	Evaluation hypothesis (where applicable)	Specific ToC component	Example data collection questions <i>These will be adapted for survey and/or qualitative approaches.</i>
Impact	Staff and volunteer hypothesis 2	Expanded / more diverse / higher quality programme of youth activities <i>Outcomes</i>	- To what extent did grant holders expand / diversify their programmes of youth activities delivered through YIF2 facilities? - How and in what ways did they expand / diversify their youth activities? To what extent did grant holders improve the quality of youth provision delivered? - How and in what ways did grant holder improve the quality of their youth activities? What was the role / contribution of YIF2 to grant holders expanding / diversifying / improving their youth activities?
Process	Young People Hypothesis 1	Increase in young people taking part in youth activities <i>Output</i> Additional positive youth activities delivered <i>Output</i>	- How do young people hear about the new / improved YIF2 facilities? What motivates them to engage with the facilities and participate in the activities delivered? What are the enablers / barriers to engagement and participation? What do young people think of the new / improved facilities and the activities delivered? - How many additional positive youth activities are being delivered within YIF2 facilities / attended by young people? How frequently are young people attending? What is the profile of those attending? Are any groups of young people over/under-represented amongst those attending activities?
Impact	Young People Hypothesis 2	Increased participation of young people in youth activities <i>Outcome</i>	To what extent has YIF2 contributed to an increase in participation of young people in youth activities? What are the enablers / barriers to participation? What is the profile of those who are participating / not participating in youth activities locally?
Impact	Young People Hypothesis 2	Young people feel safe in youth facilities and are satisfied with / enjoy local youth provision <i>Outcome</i>	- To what extent do young people feel safe in the new / improved facilities and when participating in activities? - Has YIF2 made a positive difference to how satisfied young people are with the youth provision in their area? - Do they enjoy taking part in the activities that are delivered? - Have they developed trusting relationships with staff / volunteers delivering activities?
Impact	Young People Hypothesis 2	Young people have improved soft skills and wellbeing <i>Outcome</i>	- To what extent have YIF2 activities contributed to improved soft skills (social, emotional, work-readiness) and wellbeing of young people participating in activities? - What is it about the facilities / activities that have contributed to outcomes observed / reported? What is the profile of the young people who have / have not achieved outcomes?

Overarching programme hypothesis

The Youth Investment Fund 2 will fund organisations in 'left behind' areas of England to **create, expand and improve** local youth facilities.

New infrastructure will provide organisations with physical assets that can be leveraged to generate additional sources of funding.

Updated infrastructure will achieve savings on facility running costs, making more resources available for activities that enrich the lives of young people.

YIF2 will increase access to youth facilities and positive youth activities²⁷ for young people in target areas. This will lead to positive outcomes for young people including improved mental and physical wellbeing, and skills for life.

Grant maker hypothesis 1 - Promoting the Fund

The IGM and DCMS will effectively promote YIF2 to suitable and eligible organisations across the target geographical areas. The methodology set by government for identifying eligible areas will enable applications from youth organisations and partnerships in Levelling Up priority areas.

Key assumptions to be tested in the evaluation:

- *There is sufficient demand for youth facilities / renovations in YIF2 areas.*
- *Organisations in YIF2 areas have the capacity and capability to apply for capital funding (in the available timeframes).*
- *The places selected for YIF funding are those with greatest need of youth provision.*
- *The methodology to identify eligible areas facilitates youth organisations that serve the target communities to apply for funding.*

Grant maker hypothesis 2 – Grant holder assessment and selection

The IGM selects grant holders that are organisationally and financially resilient and will be well-placed to deliver capital projects within the timescales of YIF2. Selected grant holders will have the governance, leadership, capacity, and financial management to deliver a capital project. Grant holders will have diverse revenue streams and the capacity and capability to deliver quality youth activities that young people in their communities will want. Funding will be distributed across selected areas.

Key assumptions to be tested in the evaluation:

- *The Intermediary Grant Maker (IGM) can deliver YIF2 in the time frames available.*
- *All youth organisations, regardless of size, have the capability and capacity to attract match /further funding (that is revenue-based) from other sources.*
- *Building plans and planning permission guidance are fit for purpose and accessible to youth sector organisations.*

²⁷ This measures each activity a young person takes part in. Activities are measured (rather than young people) to mitigate double counting of those who take part in multiple activities. The evaluation will explore the types of positive youth activities delivered in YIF2 facilities.

- *The allocation of funding minimises potential duplication of YIF2 funding within local areas.*
- *Funded organisations have appropriate safeguards in place and can deliver quality activities that young people want.*
- *Modular buildings with established design and processes are accessible to less well-resourced (smaller) youth organisations.*
- *Funding is distributed to organisations across all target areas.*

Grant holder hypothesis 1: Creating new / improved youth facilities.

Selected grant holders will successfully deliver a capital project in the YIF2 timeframes, resulting in 300 capital investments. Grant holders will be well supported by the IGM to enable the successful completion of the capital projects within the timeframes. These facilities will then be used to deliver a greater volume and / or diversity of youth activities.

Key assumptions to be tested in the evaluation:

- *There is unmet need and demand for youth facilities in the priority areas.*
- *Youth organisations can foresee and manage risks associated with the construction.*
- *The IGM provides support through Relationship Managers who work proactively with grant holders and intervene early to help resolve challenges.*
- *The IGM creates opportunities for grant holders to share ideas and learning to overcome common challenges associated with the managing the capital investment and ensuring it's sustainability.*
- *There is sufficient capacity in the construction sector to deliver the projects to time (including any Modular buildings).*
- *Construction materials can be sourced within project timescales and costs for these remain manageable within project budgets.*

Grant holder hypothesis 2: Energy efficient facilities

The new and upgraded YIF2 facilities will be energy efficient (rated B or better). Pre-existing facilities will be more energy efficient than in the previous year, leading to decreased/ lower running costs and lower maintenance costs. This will free up financial resources for other uses. Youth facilities will have a reduced Carbon Footprint (measured beyond the timescales of the evaluation).

Key assumptions to be tested in the evaluation:

- *Efficient buildings will lead to cost savings which frees up resource for youth organisations to use to deliver more activities. For example, by employing more staff, or delivering a wider range of provision.*

Grant holder hypothesis 3: Increased capability to raise funds among grant holders.

Grant holders will participate in training and support, such as opportunities delivered by the IGM. This support will effectively develop the marketing skills and capabilities of grant holders to undertake business planning and business development. This will result in them being able to generate more diverse funding sources, including revenue generated by other youth organisations using the facilities and through more successful funding bids.

Key assumptions to be tested in the evaluation:

Grant holders are motivated and able to participate in training and support delivered by the IGM and other providers.

Through training provided by the IGM and possibly other sources, and business planning, organisations have the capability and resources to raise funds and promote the improved / expanded facilities for use by partners.

The training and support from the grant maker is of sufficient quality to support the development of marketing and business planning skills.

There are sufficient sources of other revenue available for organisations to access.

Funding is not displaced / diverted from other local youth services to support YIF2 facilities.

New infrastructure attracts engagement and investment from other sources (eg school enrichment activities) and supports new partnerships.

Staff and volunteer hypothesis 1: Youth sector workforce capacity

Grant holders will increase their paid or volunteer workforce to expand the number of activities offered to young people.

Key assumptions to be tested in the evaluation:

- *Recruiting more volunteers will enable youth organisations to run more positive activities for young people.*
- *Organisations need to expand staffing / volunteers to deliver more activities.*
- *Local communities are willing to volunteer.*
- *Youth workers can be recruited.*
- *Staff are not displaced from other facilities in the area, contributing to an increase in the overall youth sector workforce.*

Staff and volunteer hypothesis 2: Youth workforce training and qualifications

The paid / volunteer workforce will become more qualified, leading to better quality provision and activities.

Key assumptions to be tested in the evaluation:

- *Providing capability building and training for staff and volunteers will lead to higher quality services for young people, which will in turn lead to better outcomes for young people.*
- *Youth organisations can resource training / qualifications costs from other funding sources.*
- *Training can be completed within the timescales of the fund.*
- *Volunteers have the time and willingness to train.*

Young people hypothesis 1: Engagement

Young people will hear about the new, expanded, or improved youth activities available. They will feel motivated and able to take part in activities. Young people will take part regularly in an additional 45,000 positive youth activities per year.

Key assumptions to be tested in the evaluation:

- *Young people hear about local youth provision*
- *Young people feel inspired to attend activities.*
- *The activities feel exciting and spark interest for young people.*
- *Young people feel welcome and safe to attend the facility and participate in the activities.*
- *There are enough young people locally to participate in activities and use the facility.*
- *Activities are open to all, accessible and inclusive. Young people can easily reach the facilities and there are no barriers for them attending.*
- *There are enough young people locally to generate sufficient levels of demand for the (new) facilities.*

Young people hypothesis 2: Taking part in positive youth activities.

Taking part in positive activities that youth organisations deliver in the new / improved facilities will lead to positive changes in young people's wellbeing and development of soft skills, such as personal and social skills.

Key assumptions to be tested in the evaluation:

- *Activities are of high quality and rooted in the principles of youth work.*
- *By creating facilities and engaging activities for young people, they will feel safe and secure. This security will foster participation and engagement and will increase wellbeing and in time develop personal and social skills.*
- *Young people will be satisfied with youth provision in their area, and a sense of enjoyment in taking part in youth activities will lead to improved wellbeing.*
- *The length and content of positive youth activities is sufficient to be meaningful.*
- *Young people will attend the positive youth activities regularly (at least once a month).*

- *Young people attending youth activities will maintain and build, trusted relationships with youth staff/volunteers. These relationships will contribute to improving the wellbeing and social and emotional skills of young people.*
- *By taking part in positive youth activities, young people will learn new skills (eg team work, resilience etc).*

8.7 Ethics

The evaluation processes for data collection and information governance were reviewed and approved by the Ipsos Ethics Committee. All participants were asked to provide informed consent at recruitment to any evaluation activities. Individuals being asked to consent were able to make an informed decision by consulting an information sheet explaining the research, what and who the research is for, its voluntary nature, details on confidentiality and anonymity, our disclosure policy, and contact details for the research team to help answer any further questions. Potential respondents were provided full details of how their information about by used in an Evaluation Privacy Information Notice.

Ipsos is compliant with the highest regulatory standards for the legal and safe processing of personal and/or sensitive data, including the European General Data Protection Regulation (EU) 2016/679 (GDPR), the UK Data Protection Act 2018, Market Research Society Code of Conduct and the international standards for information security (ISO 27001), market research (ISO 20252) and company quality (ISO 9001). A data flow for each type of data used in this evaluation was created to ensure that it was obtained using the relevant legal basis, stored securely and deleted in line with participant expectations.

Our standards and accreditations

Ipsos' standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a "right first time" approach throughout our organisation.



ISO 20252

This is the international market research specific standard that supersedes BS 7911/MRQSA and incorporates IQCS (Interviewer Quality Control Scheme). It covers the five stages of a Market Research project. Ipsos was the first company in the world to gain this accreditation.



Market Research Society (MRS) Company Partnership

By being an MRS Company Partner, Ipsos endorses and supports the core MRS brand values of professionalism, research excellence and business effectiveness, and commits to comply with the MRS Code of Conduct throughout the organisation. We were the first company to sign up to the requirements and self-regulation of the MRS Code. More than 350 companies have followed our lead.



ISO 9001

This is the international general company standard with a focus on continual improvement through quality management systems. In 1994, we became one of the early adopters of the ISO 9001 business standard.



ISO 27001

This is the international standard for information security, designed to ensure the selection of adequate and proportionate security controls. Ipsos was the first research company in the UK to be awarded this in August 2008.



The UK General Data Protection Regulation (GDPR) and the UK Data Protection Act (DPA) 2018

Ipsos is required to comply with the UK GDPR and the UK DPA. It covers the processing of personal data and the protection of privacy.



HMG Cyber Essentials

This is a government-backed scheme and a key deliverable of the UK's National Cyber Security Programme. Ipsos was assessment-validated for Cyber Essentials certification in 2016. Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection from the most prevalent forms of threat coming from the internet.



Fair Data

Ipsos is signed up as a "Fair Data" company, agreeing to adhere to 10 core principles. The principles support and complement other standards such as ISOs, and the requirements of Data Protection legislation.

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About Ipsos Public Affairs

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