

Paper on the economic value of volunteering and contribution-in-kind

*Roundtable discussion on European financial regulation review
and civil society*

**Filippo Addarii, Luisa De Amicis, Tamara Flanagan
Brussels, 31st January 2011**



Index

Introduction.....	3
Note on the authors.....	4
Case study from Wales.....	5
Case study from France.....	9
Case study from Denmark.....	12
Case study from Germany.....	14
Case study from Italy.....	15
ILO Manual on the Measurement of Volunteer Work: a summary.....	17
Appendix A.....	18
Appendix B.....	21

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The European Union opened 2011 with the launch of the European Year of Volunteering acknowledging the economic contribution of civil society to the European integration process. Such acknowledgement is also made in the Europe 2020 strategy. The 'Innovation Union' flagship initiative directly recognises and outlines the role of civil society organisations in tackling societal challenges (paragraph 4.3, page 21).

Such a contribution, however, is not properly acknowledged in European funding. The current European financial regulation recognizes the **possibility** for authorized officials to recognize contribution-in-kind (e.g. volunteers' time, pro-bono professionals' time or contributions-in-kind) as co-financing in funding applications (IR art.165a. 2 and art. 172). Nevertheless, this does not happen in practice because officials do not know how to measure the value of such contributions-in-kind and avoid taking risks.

The Civil Society Working Group on the reform of European funding rules (Europe for citizens, DG COM) and the Alliance for the European Year of Volunteering 2011 want to mark 2011 as the year that changed the regulation **making it mandatory for authorized officials to recognize contribution-in-kind as co-financing in applications** (cf. "[Better return on investment](#)").

In fact, such a possibility is already used in some specific cases listed here at the European and national level.

1. Case study from Wales
2. Case study from France
3. Case study from Denmark
4. Case study from Germany
5. Case study from Italy

Moreover, the handbook on measuring the economic value of volunteering developed by Professor Lester M. Salamon, Director of the civil society Study Center at the Johns Hopkins University in Baltimore, and endorsed by the International Labour Organisation could represent the basis for the European Commission to develop a standard measurement on contributions-in-kind (see Appendix B).

Note on the Authors

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1. Case study from Wales

The Value of Volunteering: Helping civil society organisations to reach the hardest to help

European Funding in the UK has traditionally been used to support individuals far removed from the labour market, improving their employability and progress towards jobs. For this reason civil society organisations campaigned in 2005 for volunteer time to be retained as match funding in the ESF regulations agreed in 2007 and were very involved with the management and delivery of the programme in previous years.

Third sector organizations in England (Competitiveness) are for the most part involved in the programme as subcontractors working with the most vulnerable, where these are a target group and in a limited number (15) of Innovation, Transnational and Mainstreaming projects.

In the devolved administrations Scotland, Wales and Northern Ireland CSOs are able to bid directly for funding. Support bodies, financed by technical assistance and national government (and in Wales partly by Welsh assembly) assist agencies in preparing, bidding and administering projects.

In Wales and Northern Ireland projects can use staff time as match funding.

In Wales, in particular a big effort has been made to ensure third sector organisations are able to provide services and the inclusion of volunteer time as match funding in Welsh national rules is highly significant in allowing smaller organisations to be involved.

The Welsh project has been developed by WCVA - it is a large, strategic project aimed at the third sector called the "**Engagement Gateway**" which is partly matched by a pot of match funding established by the Welsh Assembly government and partly matched using in kind contributions (including volunteer time) from the organisations themselves.

It provides three tiers of funding:

£0- £25000 which is 100% pre- matched

£25000- £75,000 which is approx. 70% pre-matched

£75000 - 150000 which is 59% pre-matched

The **Engagement Gateway is undertaken as part of ERDF and ESF** and is built on the successful elements of the social inclusion priority under the previous Objective 1 programme and creates a number of funding opportunities for organisations through ESF funding via tendering / procurement processes. The project promotes to the principles of a work progression model, which emphasises the development of the individual customer and their needs.

The project have been designed to link those organisations providing support and working with individuals furthest from the labour market and enable them to provide routes into either mainstream activity or activities nearer the mainstream. The intention is to deliver a coherent approach to providing a labour market pre-engagement strategy and an open and transparent, but managed, process through which a wide range of organisations will be able to make a valid contribution to the Structural Funds programmes.

WCVA followed a restricted procurement process for prospective suppliers for the project. This required the development of a 'approved supplier network who were then invited to tender for work. WCVA asked organisations (suppliers) to develop and submit proposals to deliver high quality activities and opportunities for economically inactive and unemployed individuals that would result in positive outcomes for those individuals. Tenders are invited at intervals targeting specific outcomes with named groups of participants at specific levels of contract.

The project operates under Priority 2 Theme 1 funding of the Convergence programme and Priority 1 of the East Wales Regional Competitiveness and Employment Operational Programme

Funding

Total Project Value £29m

Match Funding:

- Third Sector Orgs delivery the project £6m (this will be a mixture of cash and in kind contributions)
- Targeted Match Funding (National Assembly Funding) £7m
- ESF £16M

Legal basis

The In Kind match funding allowed for the project is defined in Article 56 Paragraph 2 sub paragraphs (a) (b) and (c) of EC Regulation 1083/2006 dated 11th July 2006 sets out the European Commission requirements related to in-kind match funding contributions. The regulation states that:

“..... In-kind contributions ... may be treated as expenditure paid by beneficiaries in implementing operations under the following conditions:

- (a) the eligibility rules laid down under paragraph 4 provide the eligibility of such expenditure;
- (b) the amount of the expenditure is justified by accounting documents having a probative value equivalent to invoices;
- (c) in the case of in-kind contributions, the co-financing from the Funds does not exceed the total eligible expenditure excluding the value of such contributions.”

In addition WEFO have published guidance on using volunteer time as match funding in-kind, with notional rates: <http://wefo.wales.gov.uk/developing/guidance/inkind/?lang=en>

Paragraph (a) refers to the Welsh National Rules on the Eligibility of Expenditure which under section 4.1.1 state:

“In-kind contributions are eligible expenditure provided that:

- they consist in the provision of land or real estate, equipment or materials; research or professional activity¹ or unpaid voluntary work (including unpaid professional services);
- their value can be independently assessed and audited;
- in the case of the provision of land or real estate, the value is certified by an independent qualified valuer or duly authorised official body;
- in the case of unpaid voluntary work, the value of the work is determined taking into account the amount of time spent and the normal hourly and daily rate for the work carried out. “

Unpaid Work

In the case of unpaid work, the value of the work is determined taking into account the amount of time spent and the normal hourly and daily rate for the work carried out (section 4.1.1 of the Welsh National Rules on the Eligibility of Expenditure). Additionally:

- a) Amounts claimed for this activity must be claimed at a rate commensurate with the nature of the work undertaken and not based on the usual salary or wage rate of the volunteer. If a volunteer does the same or similar duties as paid staff, the rate allowed for the volunteer will be the salary rate of the paid employee. In the absence of a comparative salary rate, acceptable rates are included in Annex I. **The rates outlined in Annex I for the use of unpaid work as in-kind match funding should not be exceeded for any project.**
- b) The inclusion of costs of more specialist and technical roles as in-kind match-funding would need to be agreed with WEFO before the activity commenced. The project would be expected to keep clearly documented justification for the specialist and for the agreed salary rate used for the purposes of in-kind match-funding.
- c) Time sheets should be maintained to support the hours claimed towards the project and should be signed by the volunteer and employer. An example of an appropriate time-sheet is included in Annex II.

¹ Costs for staff deployed by an organisation on a project count as actual match-funding (evidenced by salaries) not in-kind match-funding.

- d) Only persons acting in a wholly voluntary capacity will be eligible. Where an employee of the project performs additional 'voluntary' duties these will not be eligible as in-kind match-funding.

ANNEX I			
AGREED NOTIONAL COSTS TO BE USED AS ACCEPTABLE RATES FOR VOLUNTARY WORK			
The rates have been confirmed by the Welsh Assembly Government's Stats Office and are based on the 2008 'New Earnings Survey' (published November 2008).			
Job Title	SOC Code2	Hourly Rate (£)	Annual Rate (£)
Project Manager	1121	20.25	42,015
Project Researcher	2329	15.48	29,568
Project Coordinator	3539	13.48	26,366
Trainer	3563	12.61	24,510
Project Administrator	4150	9.37	18,504
Self employed (sole traders/partnerships)		10.67	
Unskilled Labour (22 years of age plus)		5.73	
Unskilled Labour (18 to 21 inclusive)		4.77	
Unskilled Labour (under the age of 18*)		3.53	

ANNEX II
Case Study
<p>RSVPs Active in Your Community project was successful in becoming an Approved Supplier for WCVA and responded successfully in 2010 to a contract to recruit over 100 older volunteers to get active in their community, gain qualifications and improve their employability.</p> <p>The project undertook to provide services in Bridgend and Rhondda Cynon Taf (former mining areas of high unemployment) It proposed to achieve 90% positive outputs including community engagement and 20% into further education and training.</p> <p>The cost of the project –some £100,897 over 18 months is met through £50,137 European funding and match funding of £50,760 from RSVP including £22,402 volunteer match based on 2 types of volunteer (project coordinator and 2 project administrators) as valued by WEFO.</p>

2. Case study from France

Adding Book Value to Volunteerism: General principles taken from the position of the French Administration at the end of 2010

Since 1999, it has been possible to add the value of volunteering to the annual accounts of French voluntary organisations (associations)

Volunteers are not formally or judicially contracted to an organisation and do not receive any financial remuneration. That said, although volunteers do not expect remuneration, in some circumstances, their expenses are covered by the organisation in question.

Calculating the 'book value' of volunteers is not currently included in the generally accepted accounting rules so this value is left to the initiative of individual organisations to determine, taking in to account various factors:

- the minimum wage (SMIG in France)
- the contractual salary of the executives and other employees of an organisation
- the cost of a salaried replacement

It is then up to the organisation to be honest and sincere in any declarations on the 'book value' of their volunteers.

Why add value to volunteerism?

The purpose of valuing volunteer effort is to calculate the social usefulness of volunteers. Amongst other factors, it permits an organisation

- to **accurately** calculate its own resources
- to show sponsors the leverage effect of their funding, with regard to volunteers

However, the 'book value' of volunteer effort must not, even involuntarily, be used to boost the accounts and finance documents of an organisation (budget, profit and loss account, grant applications...). On the contrary, it should contribute to the mission of the organisation and thereby improve the accuracy of the accounts.

Organisations that value volunteers require certain internal tools to analyse the time spent by volunteers in accomplishing their tasks. Numerous organisations have been unable to take advantage of this opportunity for lack of such tools.

How to present the value of volunteerism

The value of volunteer effort should appear in resources and expenses, under 'financial accounts' in a summary table of voluntary contributions, loans and donations. In this way, volunteers will be valued in the 'income' account and will appear in the 'expenses' account for the same total in 'voluntary personnel'.

Advantages linked to valuing volunteerism

On the whole, the state and local authorities do not make grants to NGO projects exceeding 80% of the total resources required by the organisation to realise the project.

A simplified example: an organisation presents a projected budget of €55,000 to realise a project. Spending less than €5,000 of their own resources, the organisation seeks €50,000 of additional funding from governmental sources.

Income/Revenue Account

Operating Government Grant	50,000
- Community outreach	30,000
- Social Services	20,000
Other contributions	5,000
TOTAL FUNDS	55,000

You can see that, in this example, the requested government grants represent 91% of the total funds needed for the budget. The current regulations limit state grants to this project at 80% of total funds or €44,000. As a result, the project does not meet criteria for funding and will not be successful in its application.

In the same example, if we were to add an additional line to the 'other contributions' account, corresponding to the value of voluntary action on this project, it would represent €25,000.

This would mean that, hypothetically, the €25,000 considered as a contribution from the own resources of the organisation will elevate the total resource budget to €80,000.

The €50,000 requested from the state now only represents 62% of total resources, meeting government criteria.

The Mecat de Competences example for Pro Bono Work

A company that wishes to donate time to a voluntary organisation calculates the value of that time based on the employee's salary.

E.g. Mr Smith gives 1 afternoon per week of his time.

Mr Smith is paid £34,000 including NI /Pension

His value to the NGO is $321.58 \text{ ph} \times 4 \times 50 \text{ days} = \text{£}4317$

The company are allowed to deduct 60% (£2590) of this value from their profits before paying corporation tax

In a company giving a lot of support, say in team tasks, this could be an interesting incentive.

3. Case Study from Denmark

Transnational Cooperation in the North Sea Region

About

The North Sea Region Programme 2007-2013 is one of 13 transnational programmes funded by the European Regional Development Fund (ERDF) under the European Territorial Cooperation objective that allows for transnational work between regions from several EU Member States.

The 2007-2013 North Sea Region Programme connects regions from seven countries around the North Sea, incorporating policy level planning and long lasting and tangible effects of projects. The seven countries involved are Sweden, Denmark, Germany, the Netherlands, the Flemish Region of Belgium, the UK and non-Member State Norway.

The Programme works with cutting edge policy areas in regional development through transnational projects. The areas in the region share many of the same problems and challenges. By working together and sharing knowledge and experiences it is hoped that a sustainable and balanced future will be secured for the whole region.

Aim of the Programme

The aim of the Programme is to make the North Sea Region a better place to live work and invest in. This means that the North Sea Region Programme has a role in enhancing the overall quality of life for residents of the North Sea Region by ensuring that there is access to more and better jobs, by sustaining and enhancing the acknowledged environmental qualities of the region, by improving accessibility to places and by ensuring that our communities are viable, vibrant and attractive places to live and work.

This endeavour translates into four Programme priorities, which are to promote transnational cooperation that:

- Increases the overall level of innovation taking place across the North Sea Region,
- Enhances the quality of the environment in the North Sea Region,
- Improves the accessibility of places in the North Sea Region,
- Delivers sustainable and competitive communities.

Status of the Programme

The North Sea Region Programme began its work in 2000 and the current IVB Programme is a continuation of the IIC pilot Programme, which ran 1997-1999, and the IIIB Programme, which formally ran 2000-2006.

After its fifth call for applications, the IVB Programme currently funds 46 projects that deliver towards the above listed four priorities. The Programme has allocated around 83 per cent of its ERDF budget of approximately 130 million Euro. Projects include partners from at least three countries within the cooperation area, two of which must be from an EU member state. All 46 projects follow an overall transnational and innovative approach and create lasting results and impact for the North Sea Region as well as link to European level policies.

For the first time this year, the Programme also offers the opportunity for strategic cluster projects to apply for funding. Cluster projects bundle three or more of the existing projects in order to increase impact and visibility with regards to a specific theme of the region.

4. Case Study from Germany



Rieneck Castle, a twelfth century castle near Würzburg, in Bavaria was renovated in 2003 by the European Scouts Voluntary Programme where Scouts engaged in voluntary service. Thanks to a law related to historic monuments the Scouts were able to access government aid to purchase the materials needed for the renovation.

The rule - in german language - can be found at http://www.blfd.bayern.de/medien/anbest_pk.pdf

The amount of aid was calculated as a match amount established on the basis of the volunteer labour. The labour was counted at two rates €13.00 for unskilled labour and €15.50 for specialist labour.

<http://www.burg-rieneck.de/>

5. Case Study from Italy

The Italian Ministry of Labour and Social Policies, in charge of volunteering policy at national level and 2011 AEV National Coordinating Body, has recently allowed civil society organisations to use volunteer time as co funding up to 10% to match government grant funding in some specific programmes. This is the case of the yearly Call for innovative projects of the local voluntary organisations by the National Observatory for Volunteering, governed by the Italian Framework Law on Volunteering 266/1991.

The call was introduced for the first time this year (4th August 2010) in response to the claims of the National Observatory for Volunteering and further to the common political platform "Manifesto for Volunteering in Europe".

Manifesto (English version)

http://www.destinazioneeuropa.eu/intranet/documenti/Manifesto_of_Italian_Volunteering_for_Europe.pdf

Legal basis

With particular reference to the promotion of voluntary activities is stated that volunteering – as it is stated in Article 2 of Law on Volunteering 266/1991 - is given in a personal, spontaneous and free way, through the organization the volunteer is part of; and only for solidarity aims.

Volunteering cannot be paid in any way, not even by the recipient. The volunteer may only be reimbursed by the belonging organisation for the actual expenses incurred for the activity performed, within the limits previously set by the organizations themselves. The quality of volunteering is incompatible with any form of employment or autonomous job and with any other financial relationship with the belonging organisation.

Therefore, volunteering activities are not a cost, but the estimated corresponding real cost may be valorised.

The valorisation of the activities performed by volunteers during a project must not exceed:

- For ordinary activities, the ceilings of the rates foreseen in the contracts of social cooperatives;
- For professional services either highly qualified or not foreseen in the contracts of social cooperatives, the ceilings of the specific rates provided by professional registers and from their charts of professional services.

The activity done by volunteers - as defined in the project description and in the economic plan – is subject to valorisation only within the share of 10% that the applicant organisation has to provide.

<http://www.lavoro.gov.it/Lavoro/md/AreaSociale/Volontariato/Progetti/Anno+2010.htm>

For the year 2010, the annual directive under Law 266/1991, is divided into two different measures that have been published in the Official Gazette, general series, n. 215, September 14, 2010:

- the [Directive of 30 July 2010](#) , signed by the Minister of Labour and Social Policy, in view of the proclamation of 2010 as European Year for Combating Poverty and Social Exclusion and the year 2011 as Year of the Volunteer activities that promote active citizenship with the respective decisions of Parliament and the European Union Council No 1098/2008/EC of 22 October 2008 and n.15658/09/Ce of November 24, 2009, defines the priority areas of action and methods for the presentation of experimental projects for voluntary work (under article 12 Law 266/1991) presented by voluntary organizations for more than two years and regularly registered with provincial / regional voluntary (Article 6 of Law 266/1991) on the date of publication of the Directive and the relevant notice published in the Official Gazette ;
- [Public notice of the August 4, 2010](#) signed by the Director General of the Directorate General for Volunteers, community life and social formations on the administrative procedures for the submission of applications for assistance for conducting experimental projects referred to volunteer ' art.12 of Law 266/1991 submitted by volunteer organizations.

ILO Manual on the Measurement of Volunteer Work: A summary

Who?

This document was drafted by the John Hopkins Center for Civil Society Studies in cooperation with the International Labour Organisation and an international Technical Experts Group.

What?

The Manual represents the first-ever internationally sanctioned approach for gathering official data on the amount, character, and value of volunteering.

Why?

The objective is to make available comparative cross-national data on a significant form of work that is growing in importance but that is often ignored or rarely captured in traditional economic statistics.

To fulfil the mandates set by recent UN General Assembly Resolutions, underlining the need for improved data on volunteer activities.

Implications for co-financing?

If the value of volunteering can be identified and measured then it can be taken in to account in co-financing.

Appendix A

The Engagement gateway

This proposal aims to achieve a strategic approach to co-ordinating third sector project activity in relation to the strategic framework for Increasing Employment and Tackling Economic Inactivity and will facilitate the engagement of the target groups indicated in that framework.

The Gateway will build on the successful elements of the social inclusion priority under the Objective 1 programme and create multi-layered funding opportunities through three tiers of ESF funding from less than £25,000 through to £150,000 via tendering / procurement processes. The Engagement Gateway will adhere to the principles of a work progression model, which emphasises the development of the individual customer.

The project operates under Priority 2 Theme 1 funding of the Convergence programme and Priority 1 of the East Wales Regional Competitiveness and Employment Operational Programme.

The project has been designed to link those organisations providing support to 32,000 individuals furthest from the labour market and enable them to provide routes into either mainstream activity or activities nearer the mainstream. The intention is to deliver a coherent approach to providing a labour market pre-engagement strategy and an open and transparent, but managed, process through which a wide range of organisations will be able to make a valid contribution to the Structural Funds programmes.

The intention is to create a flexible tendering process that links innovative actions engaging with those furthest to reach to mainstream strategies and programmes. Prime examples would include:

- Tendering for activity in specific geographical areas such as “Heads of the Valley” or the North Wales Labour Market Intermediary.
- Tendering for activity that will address the complex needs of specific client groups due to their economic, social and family circumstances (e.g. learning difficulties, drug/alcohol dependency, low skills and self-esteem etc.). The focus will be on facilitating referral into specialist services or projects in order to provide an individually tailored programme of personal and skills development.

Whilst it is not intended to dictate to organisations what particular type of activity they must carry out, all successful applicants will need to clearly demonstrate:

- They have a clear understanding of the needs of the client group.
- Evidence of their methods of engaging with the particular client group.
- How the activity they propose is different from that provided by mainstream activity available, that it will provide measurable positive outcomes, as well as firm progression routes for the participants involved.
- How this will link to further activity either in preparation for mainstream activity or in mainstream activity itself.

Whilst a high proportion of the targeted actions under this project will not directly impact on the 'hard outcomes' that are defined within the Strategic Framework, the targets will represent a significant step towards achieving these targets.

The inclusion of local support, advice, and development via local managers/ coordinators has also been included under this project to minimise potential overlap and maximise strategic integration with other European and Mainstream Inactivity programmes or projects. Wales Council for Voluntary Action (WCVA), the County Voluntary Councils (CVCs) and Volunteer Centres provide a formally recognized support infrastructure for third sector activity on behalf of the Welsh Assembly Government through a five-year partnership agreement. This network of organisations will provide the co-ordinated support necessary to local and regional projects supported.

The project will build upon the work undertaken by this infrastructure in supporting individuals who are currently economically inactive in order to provide clearer routes for individuals. Local managers (advisors) would be expected to develop cross referral systems, make links with and complement other Economic Inactivity projects.

The infrastructure will provide supplier development through advice and support to contracting organisations in respect to their individual organisational needs and the needs of the clients. It will also provide linkages with other local activity that could assist individuals in their preparation for work: Those individuals who wish to undertake volunteering as a pathway to work will be supported by placements providing advice and assistance on how this can lead towards greater employability.

The infrastructure will link and work with at a local and regional level with external partners such as DCELLS, Job Centre Plus and other training providers to provide an appropriate skills development and employment focus. The project will promote quality standards such as Investor in People and Investors in Volunteers quality mark within host organisations, encouraging the accreditation of knowledge, skills and experience.

Targeted actions will be tendered via three tiers of activity:

Tier One

Organisations will have the opportunity to try out innovative pilot targeted actions using up to £25,000, over a maximum two-year period. These targeted actions will be based on sound evidence of need and will encourage demand led approaches and innovation to address identified problems of exclusion, disaffection and low engagement; trialling new approaches to working with those furthest from the labour market. It is anticipated that there will be approximately 100 targeted actions at this level per year, a value of approximately £3,000,000 per year.

Each project under this tier would be expected to target a minimum of 27 participants per project, improving their confidence, skills and motivation enabling them to progress on to other opportunities on

completion of the project. Under this tier, it would be expected that a minimum of 45% of participants to progress directly on to other opportunities as a result of taking part in a project.

WCVA would not actively seek match funding at this level: equally it would not seek to discourage organisations contributing match funding.

Tier Two

The second tier of funding will offer £25,000 to £90,000 per organisation, and will support projects to evolve their ideas, including those developed under Tier One. This tier will be open to successful applicants from level one, and other applicant organisations that have completed a successful pilot project funded by other sources, e.g. Communities First, or the Big Lottery Fund. Projects could run for a maximum of two years and the level of funding would allow organisations to employ full time project staff. Projects funded at this stage would be expected to demonstrate in-depth participant evaluation and map individual development, increased confidence and independence and progression to further training or employment. It is anticipated that there will be approximately 55 targeted actions at this level per year, approximately £5,500,000 per year. Each project under this tier would be expected to target approximately 110 beneficiaries, improving their confidence, skills and motivation enabling them to progress on to other opportunities on completion of the project. Under this tier, it would be expected that a minimum of 65% of participants to progress directly on to other opportunities such as employment or further education as a result of taking part in a project.

Tier Three

The final tier of progression will offer £90,000 to £150,000 per organisation, and will focus on evaluation and exit/sustainability strategies for individuals to ensure that they are placed well on the road to employment or learning. One targeted action per organisation will be available at any time, possibly following successful completion of a level one or two project. Outcomes would be expected to include referral of participants into further training, supported employment, mainstream employment support provision or employment. Applicant organisations would be expected to work towards sustainability by accessing alternative funding; services commissioned by other agencies, including statutory bodies; establishing income streams from activities such as new social enterprises and community businesses, etc. Applicants at this level would also be expected to provide some, if not all, match funding needed for the intervention. It is anticipated that there will be approximately 10-targeted actions at this level per year, approximately £1,500,000 per year.

Each project under this tier would be expected to target approximately 165 beneficiaries, improving their confidence, skills and motivation enabling them to progress on to other opportunities on completion of the project. Under this tier, it would be expected that a minimum of 90% of participants to progress directly on to other opportunities as a result of taking part in a project.

It is anticipated that projects greater than £150,000 would access Convergence funding through the routes and processes developed by WEFO.