

# Education Pathways Programme Awards Open Call Guidance

## Priority Area:

**Improving engagement in education and learning for children, young people and their families to prevent and reduce future rates of poverty and trauma in Scotland.**



# Guidance: Applying for our Education Pathways Programme Awards Open Call

If you have any communication support needs that make reading this guidance or completing an application form difficult, please contact us on 0141 353 7300 or [programmes@therobertsontrust.org.uk](mailto:programmes@therobertsontrust.org.uk) to discuss alternative ways you can apply.

The closing date for Stage 1 applications is **12 noon on Friday 10th November 2023**

## Education Pathways Programme Awards - Short Summary

During October 2023, we are running an open call for Programme Award applications through our Education Pathways theme. The ultimate aim of the Education Pathways theme is to help shape an education system that maximises its contribution to wellbeing, is trauma informed with the aim of preventing and reducing poverty in Scotland.

For this open call, our priority area is:

**Improving engagement in education and learning for children, young people and their families to prevent and reduce future rates of poverty and trauma in Scotland.**

This includes an interest in levels of engagement in formal settings (schools, work experience and vocational learning opportunities and FE/HE for example) but also includes an interest in how work in the informal setting (third sector, community, outdoor and home for example) can improve engagement in learning and education, widen opportunities for children and young people, bridge the attainment gap, and more broadly reduce the risk of poverty in the future.

Programme Award applications are more likely to be successful for work with the highest potential for delivering big change that lasts on tackling poverty and trauma in Scotland. For this open call, this includes work (in line with the priority area above) such as:

- Feasibility and development projects
- Test and demonstration projects
- Research projects with a clear and strong link to delivering change.
- Campaigning, mobilising, policy and influencing projects.

Our Programme Award applications should be for work that would not be eligible through The Trust's **Our Funds**.

**For example, we will not fund direct service delivery through our Programme Awards, unless it aims to test a new approach which has the potential for wider system change and impact.**

### **Applicants to our Programme Award should be:**

- An organisation working in Scotland with an annual income of more than £100,000.
- A charity, asset-locked Community Interest Company, Housing Association or a Credit Union whether alone or in partnership (including with other types of organisations).
- Applying for project-restricted revenue funding for up to five years, usually between £50K and £500K in total, and up to £250k per year. We expect to spend up to £2.5M through this call, subject to level of demand and nature of proposals we receive.
- Interested in supporting meaningful and ethical co-design and co-production with people with experience of poverty and trauma, which will be one of our key criteria in assessing applications.

Applications will be through a two-stage process with an initial Stage 1 short application followed by a full application for those who progress to Stage 2.

To send us your application please complete the Stage 1 application form [HERE](#) by midday on **Friday 10th November 2023**.

For those who successfully progress, Stage 2 will take place from **Thursday 14th December 2023 – Friday 9<sup>th</sup> February 2024**

# Education Pathways Programme Awards – Detailed Guidance

*Please click on each heading to go directly to that section of the guidance.*

## **Contents page**

<b>Education Pathways Open Call</b> .....	4
Priority areas .....	4
What could we be interested in? .....	5
Learning from our Programme Awards.....	6
<b>Funding Criteria</b> .....	7
What will we fund through Programme Awards? .....	7
What do we mean by big change that lasts? .....	8
Population groups .....	8
Programme Awards are open to: .....	9
What can I apply for through this open call? .....	9
What won't we fund through Programme Awards?.....	10
Who can't apply? .....	10
__What won't we consider funding through this open call? .....	10
<b>The Application Process</b> .....	11
__What do I need to apply? .....	11
__How will applications be assessed?.....	12
__How do I apply?.....	12
__What happens next? .....	13

## Education Pathways Open Call

We are currently inviting Programme Award applications through an open call on the theme of Education Pathways.

The Robertson Trust's mission is to fund, support and champion those building solutions to poverty and trauma in Scotland. This is in service of our vision – a fair and compassionate Scotland where everyone is valued and able to flourish. Together, we aim to build solutions and positive, sustainable change, in order to create a just society. Education is one of our four primary themes.

Our Education Pathways theme is focused on helping to build an education system that maximises its contribution to preventing and reducing poverty and trauma in key ways including:

- (i) narrowing the poverty-related attainment gap at school.
- (ii) improving parental/guardian engagement in early years care and education.
- (iii) improving transition support, between primary and secondary school, and between school and the post-16 education and skills system.
- (iv) driving improved participation and attainment within the post-16 education system.
- (v) driving improved rates of students from underrepresented groups gaining strong graduate outcomes post-qualification.
- (vi) ensuring early years, schools, colleges and universities are able to drive engagement in education, and spot and address poverty and trauma among the learner and student population.

The Trust is working on these aims across a range of work to fund, support and influence change and will continue to do so over the course of our strategy through to 2030. We will provide regular external updates on how each of these aims are progressing.

### Priority areas

For this open call for Programme Award applications through Education Pathways, we are particularly interested in proposals for projects that relate to the following priority area:

**Improving engagement in education and learning for children, young people and their families to prevent and reduce future rates of poverty and trauma in Scotland.**

We know that education and learning is about more than exam results. However, we also know that young people who leave school with no or low levels of qualifications are

at significant risk of experiencing poverty in future years – see [here](#)<sup>1</sup> and [here](#).<sup>2</sup> We want to fund projects that can deliver the support needed, whether through formal or informal learning, that can reduce the risk of poverty in the future.

Learning and education is wider than the formal settings of nursery, school or college/ university. We are interested in learning, which occurs in both formal and informal settings – including the third sector, through work, outdoor settings and the home learning environment.

Engagement is about more than attending, whether in formal or informal settings. It is about attitudes to school, to education and learning more broadly. It is about participation in learning activities and a sense of belonging – that education and learning is valued and seen as something for learners and families from all backgrounds to be supported by organisations and institutions to participate in together.

The experience of the last few years, firstly through the Covid-19 pandemic, and now through the ongoing cost-of-living emergency has brought a renewed focus on school attendance rates. Through this open call we want to focus on improving levels of engagement, in early years settings, school or college and outside of school/college, to ensure that we keep in mind the overall outcome we are aiming to achieve. For us, that goes beyond attendance and is about action now that can prevent and reduce poverty and trauma in the future.

### ***What could we be interested in?***

In the context of post-Covid recovery and the ongoing cost-of-living emergency, work in this area is urgent and could be highly impactful. Through our discovery work in Education Pathways, we have heard there are potential gaps in provision, practice and policy on how we support children, young people and their families that are disengaged from education and learning, including for those who have not fully returned to education following the pandemic. We have heard that a focus on learning and education that can take place outside of the school setting has the potential for ultimately re-engaging children and young people in learning that could prevent them falling into poverty in the future.

We are interested in supporting work to best engage children, young people, and their families, in education and learning in school and beyond the school. We know that formal learning can, and does, work for many young people and their families. However, for others, it is learning and education outwith the school setting that can be transformative, re-engaging children and families in education and learning in its broader sense and reducing their risk of experiencing poverty in the future. For most, it will likely be both, with successful engagement being about children, young people, and

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<sup>1</sup> ONS, 'How do childhood circumstances affect your chances of poverty as an adult?' (16<sup>th</sup> May 2016)

<sup>2</sup> Scottish Government, 'Adult lifetime skills: a literature review' (25<sup>th</sup> April 2023)



families developing high-quality engagement in learning and education both within and outwith the school day, through a mix of school-based, college-based, community-based and home-based support.

We are interested in supporting projects that could include work to (not exhaustive):

- Understand and address the root causes of exclusion, non-attendance and dis-engagement at school and in learning and identify interventions to support children and young people to re-engage with learning and education through formal and informal settings.
- Develop and deliver interventions that boost attainment and achievement among those at risk of no or low-level qualifications and/or reduce the impact of gaining no or low-level qualifications on young peoples' future prospects.
- Understand the barriers and positive factors for specific population groups in accessing and engaging in education and learning in Scotland, including disabled people and families and supporting anti-racist approaches.
- Promote meaningful participation by learners and families to shape their own education and learning and engage in successful whole-family approaches and parental-engagement approaches.
- Integrate numeracy, literacy and other attainment-focused activity into after-school and non-school activities to prevent and reduce future poverty.
- Understand how informal education opportunities can be better-recognised and valued, including their potential contribution to attainment and preventing and reducing poverty and trauma in the future.
- Adopt a human rights-based approach to support pupils at risk of future poverty to prevent and reduce it.
- Developing resources to enable school leadership colleagues to support more positive behaviour approaches.
- Applying relevant evidence and developing school based research that enables schools to understand their wider community and experiences of families and learners
- Adopt trauma-responsive approaches to support pupils at risk of future poverty to prevent and reduce it.

## Learning from our Programme Awards

Through all of our Programme Awards, we want to understand what differences they are contributing to and what is making those differences. We also want to learn alongside cohorts to explore what helps or hinders big change to happen in different contexts.

All of our Programme Awards should have a plan for evaluating the work to help us explore the questions above together. The evaluation might be completed internally or externally but we would expect to see a clear rationale either way. We will look at

applicants' evaluation plans during the stage 2 assessments and can work with you to help develop them as appropriate.

For our Education Pathways open call, we anticipate bringing organisations together a couple of times a year to consider common themes emerging from the learning of individual projects. We would expect to see appropriate costs for the overall evaluation, and learning events to be included in the project budget.

## Funding Criteria

### What will we fund through Programme Awards?

Through Programme Awards we will support work which aims to deliver big change that lasts on tackling poverty and trauma in Scotland. For more information on what we mean by poverty and trauma click [here](#)

We will not fund direct service delivery through our Programme Awards unless it is testing a new approach that has the potential to improve the broader system and wider service delivery.

Through our Programme Awards, we are interested in providing funding and working alongside organisations to drive the ideas and practice that can ultimately deliver the change we wish to see on tackling poverty and trauma in Scotland, in line with our engagement priority area outlined above.

This could be through:

- (i) Research and development projects – work to develop good ideas with high potential for change at scale, including work to build partnerships and participation to design and deliver good ideas.
- (ii) Test and demonstration projects – work to test and demonstrate new approaches to services and work that can reduce poverty and trauma in Scotland, in line with our priority area above. This could include scale-up or spread of existing approaches if there is a high-potential for big change that lasts.
- (iii) Research focused on change - we are not primarily a research funder but we will fund research where it can clearly and demonstrably connect to action to deliver change.
- (iv) Advocacy, policy, campaigning and influencing projects – to change policy, practice, the quality of opportunities available, attitudes and behaviours.

We want to support work focused on Scotland, with the aim of delivering impact to prevent and reduce poverty and trauma. Organisations do not need to be Scotland-based but do need to be working in Scotland and to display a good understanding of the context in Scotland in order to show potential for big change that lasts.



### ***What do we mean by big change that lasts?***

We want to fund work through our Programme Awards that can deliver big change that lasts on preventing and reducing poverty and trauma, and through this call we are focused on our Education Pathways theme and our engagement priority area. We want to fund work that has a clear, thought-through and demonstrable potential to lead to significant impact on preventing and reducing poverty and trauma at scale. This could either be in general, across low-income people and families overall, or for particular population groups or geographical areas at greater risk of poverty and trauma in Scotland.

For us, big change that lasts means delivering systems change, strategic change and/or long-term change. Put simply we want to fund work over the next 3-5 years that has the best possible chance of delivering significant impact on poverty and trauma over the long-term. **Applications that can demonstrate a clear link between the proposed work and a long-term impact on preventing and reducing poverty and trauma in this thematic area will be most likely to be successful.** This includes thinking through the links and the logic between the first and next steps of the work and the ultimate aim, the people and organisations that will need to act to deliver that aim, the activity that should enable them to do so, and the partnerships and coalitions of support needed to maximise the chance of that happening.

Some refer to this as a theory of change and/or logic models. We don't mind what you call it, we just want to know you have thought through how you need to act, and who you need to act on, to deliver the change we want to see, and why this proposed work has the best chance of succeeding in doing so.

### ***Population groups***

We are particularly interested to see applications from organisations working in a focused way with at least one of our prioritised population groups within low-income families and/or those at risk of poverty, which are:

- Larger families
- Lone parent families
- Families with young children
- Young parent families
- Families with a disabled child or adult
- Black, Asian and minority ethnic families
- People with experience of the care system
- Young Carers
- Asylum seekers and refugees, including people and families with no recourse to public funds status

The Robertson Trust is committed to build participation with people with experience of poverty and trauma into much more of what we do. This includes what we fund and

who we work with. Meaningful and ethical co-design and co-production with people with experience of poverty and trauma will be one of our key criteria for assessing applications through our Programme Awards.

## Programme Awards are open to:

- Organisations working in Scotland with an annual income of more than £100,000.
- The following types of organisations are eligible to apply:
  - Registered Charities
  - Asset Locked Community Interest Companies (*must be able to demonstrate a satisfactory asset lock demonstrating how they do not distribute assets or profits to individuals or third parties*)
  - Housing Associations
  - Credit Unions
- Partnerships led by one of the organisations above can include other types of organisations (such as companies or public bodies) – see *In Partnership?* below.

If the proposed project is being delivered by a subsidiary company with a different legal structure to that outlined above, the application (Stage 1 application) should be made by the parent company, which must meet our published eligibility criteria.

Organisations already in receipt of another award from The Robertson Trust are eligible to apply through Programme Awards as long as the proposed work is different or additional to what we already fund. The Robertson Trust has other funding available to some organisations with an income of less than £2 million - for more information see [here](#).

## What can I apply for through this open call?

We will look to ordinarily make awards for up to five years or less, with a total award amount of between £50,000 and £500,000. We expect feasibility and development work to be at the smaller and shorter scale of what we will fund through Programme Awards, with test and demonstration work more likely at the larger and longer scale of our Programme Awards. Programme Awards are open to registered charities, Community Interest Companies, Housing Associations and Credit Unions. The total budget available through this Programme Award call will be up to £2.5m, subject to level of demand and nature of proposals we receive.

- Project restricted revenue funding for up to five years, for a total award usually between £50K and £500K. This can include staffing costs and direct delivery costs. We will look carefully at the amount of funding requested as against the

existing size and income of the organisation. It is unlikely that smaller organisations will be successful for larger awards.

- We encourage applicants to include within their project budget full cost recovery (i.e. direct project costs and a proportionate share of organisational overheads), in addition to evaluation costs. We are happy to consider both part funding and fully funding the costs of Programme Award proposals.
- Given current and projected levels of inflation it is important proposals for more than one-year include a realistic assumption for cost-of-living and price increases.

## What won't we fund through Programme Awards?

### *Who can't apply?*

- Organisations with an annual income of less than £100K.
- Other types of organisation which are not listed on [page 9](#).

### *What won't we consider funding through this open call?*

We will not fund work through Programme Awards that could be funded through [Our Funds](#), including Large Grants. The Large Grant guidance is [here](#). We have outlined some illustrative examples of projects we are likely to fund through our Programme Awards below, but this is not an exhaustive list and is there for reference only.

Overall, we will not fund work unless it can demonstrate a high potential for delivering big change that lasts and is very likely to be sustainable, beyond the funding term and beyond the direct beneficiaries of the work. This will need a well-thought through plan for how the proposed work links to delivering long-term change on poverty and trauma in general, and on education pathways and priority area specifically. As outlined above big change that lasts could be for low-income people and families as a whole or for population groups or areas more likely to be at risk of experiencing poverty and trauma.

The following is not an exhaustive list but provides broad examples of the type of work we would be unable to fund within Programme Awards:

- Projects that would be eligible for support through [Our Funds](#).
- Work that is not relevant to our education pathways theme in general and our priority areas in particular.
- Direct delivery of services, unless this is testing and demonstrating a new approach which has a good potential to lead to wider change and is in line with our priority area.
- Work that has a low potential for impact beyond the funding period or beyond direct beneficiaries of the project.

- Unrestricted funding (though we do encourage full cost recovery and will fund a proportionate share of organisational overheads through Programme Awards).
- Wider interventions and approaches which do not have a clear connection to delivering big change that lasts on tackling poverty and trauma in Scotland.
- Applications which are about improving or changing internal organisational capacity, capabilities or structure (unless there is a clear link to how this will improve outcomes for people experiencing poverty and/or trauma).
- Work which solely seeks to build understanding of the *causes* of poverty and trauma as opposed to delivering *solutions* on poverty and trauma.
- Restricted funding for capital projects.

If you have questions on what we will not be seeking to fund, please email [programmes@therobertsontrust.org.uk](mailto:programmes@therobertsontrust.org.uk).

## The Application Process

### What do I need to apply?

- **A minimum of three unconnected Trustees** on your organisation's Board. By unconnected we mean not related by blood; married to each other; in a relationship with each other or living together at the same address. *We will ask this at Stage 1.*
- **Recent audited annual accounts.** *We will seek this at Stage 2 if you are successful at Stage 1.*
- **A safeguarding policy.** If your organisation directly supports infants, children and young people or vulnerable adults, we would expect you to have an appropriate policy document which sets out how you will keep them safe. *We will seek this at Stage 2 if you are successful at Stage 1.*
- **A policy on equality and diversity.** We want to know that your organisation has a written agreement detailing how you will avoid discriminating against people, and how you will create a safe and inclusive atmosphere both within your workplace and for the people you support. *We will seek this at Stage 2 if you are successful at Stage 1.*
- **A Living Wage policy** or an outline of progress being made towards paying the real living wage. *We will seek this at Stage 2 if you are successful at Stage 1.*
- **A Fair Work policy** or an outline of progress being made towards one. This should include all dimensions of the Fair Work Framework (effective voice, opportunity, security, fulfilment and respect) and especially around **effective employee voice**. *We will seek this at Stage 2 if you are successful at Stage 1.*

**In partnership?** If you're making an application on behalf of a formal consortium of more than one organisation, please be aware that we will require a signed copy of your Memorandum of Understanding if you're invited to the second stage of our application

process, which includes the contact details for all partners and covers all key aspects of the partnership (including for example GDPR arrangements). Please note that the lead organisation should make the application on behalf of the consortium and must therefore meet our key eligibility and criteria. Other partners in the consortium do not need to meet our eligibility criteria.

## How will applications be assessed?

Our assessment processes will include assessors from across The Robertson Trust staff team. We will also involve assessors with first-hand experience of the issues we are seeking to address, including the voices of children and young people. . We are interested in applications that can demonstrate a high level of quality across a range of areas. This includes:

- An understanding of poverty and trauma and education and learning – does the application display a strong understanding of The Trust’s strategic aims to tackle poverty and trauma, and our thematic area of education pathways (and any links across our other themes)? Does this application link to one or more of our three priority areas for this open call?
- A potential for change and scale – does the application have a well thought through and persuasive theory of change with potential for sufficient scale of impact on poverty and trauma, either in general or for specific population groups/geographical places?
- A clear focus on impact and delivery – does the application have the organisations and staff team in place with the skills and experience necessary to deliver the impact desired - and a clear understanding of how they will measure the impact of the work?
- A well thought -through approach placed on participation and relationships – are people with experience of poverty and trauma meaningfully and ethically at the heart of design and delivery of the work or, if not, has a strong case been made as to why not?
- A strong focus on collaboration – does the application show it has plans in place for successful engagement from other relevant people and organisations that can help to maximise the chances of delivering big change that lasts?

## How do I apply?

The application process for this open call will be in two stages: an initial Stage 1 shorter application followed by a full application for those who reach Stage 2. Applicants that

are successful in reaching Stage 2 may be eligible for a small award of funding (usually around £5k depending on development work needed) to help cover the costs in developing the application further for the second stage.

To apply through this open call please complete your Stage 1 application **by Friday 10<sup>th</sup> November**.

A link to the application can be found [HERE](#).

Please contact us at [programmes@therobertsontrust.org.uk](mailto:programmes@therobertsontrust.org.uk) to discuss alternative ways to apply.

### What happens next?

We'll email you to let you know that we've received your Stage 1 application. This will then be reviewed, together with all proposals we receive and we plan to let you know the outcome of our decision by **w/c 11<sup>th</sup> December 2023**

We may arrange a brief conversation with applying organisations after the Stage 1 deadline, should we need to clarify details of your application. This conversation would likely be during w/c 27<sup>th</sup> November and w/c 4<sup>th</sup> December 2023 and, if possible, should include any key partners within the application.

If you are invited to proceed to the next stage we will send you a link to our Stage 2 application form on 14<sup>th</sup> December 2023 with a clear deadline.

*This second stage of the process may involve a more in-depth conversation between applicants and members of our Programme Award team here at the Trust to explore in more detail the nature of your proposal.*

We'll aim to let applicants know the outcome of Stage 2 before the end of March.

### Feel free to get in touch.

If you have any questions about applying for our Programme Award, please contact us at [programmes@therobertsontrust.org.uk](mailto:programmes@therobertsontrust.org.uk).

We've done our best to make sure the above guidance is clear, however, if you have any feedback on this, we'd welcome the chance to talk to you about it.





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