

**9<sup>th</sup> December 2025**

## **Review of RIF Evaluations and Quarter 2 Projects**

### **1 Introduction**

- 1.1 Purpose of the report today is to endorse the decisions of the Population Programme Boards for funding for the regionally funded schemes for 25-26.
- 1.2 In line with the RIF model, all projects in year 2 acceleration were due formal evaluation and all projects in year 1, 3, 4, 5 were due a light touch review.
- 1.3 A process was implemented to ensure that all the evaluations and reviews of RIF funded projects were completed before Christmas in order to ensure all organisations had sufficient notice of future funding.
- 1.4 All RIF funded schemes can be found on the West Glamorgan website:  
<https://www.westglamorgan.org.uk/regional-integration-fund/>

### **2 Overview of Regional Funding**

- 2.1 Summary of the RIF is as follows:

**Table 1:**

<b>Regional Integration Fund</b>	<b>Allocations 25-26</b>	<b>Expiration Date</b>
Regional Infrastructure	£750,000	Mar-27
Acceleration AND Embedding	£15,647,860	Mar-27
	<b>£16,397,860</b>	
<b>National Fund (Ring-Fenced)</b>		
Memory Assessment	£381,000	Mar-27
Dementia	£1,175,000	Recurrent
Dementia Connector	£100,000	Recurrent
Integrated Autism Service (IAS)	£398,000	Mar-27
WG carers	£129,000	Mar-27
Short Break Carers Funding * <sup>1</sup>	£168,082	Mar-26
<b>Total National Fund</b>	<b>£2,351,082</b>	
<b>Total RIF Allocations</b>	<b>£18,748,942</b>	
<b>Other Funding Managed through Partnership:</b>		
Health Board MH Service Improvement Funding	£392,047	Recurrent
<b>TOTAL REGIONAL FUNDING</b>	<b>£19,140,989</b>	

\* <sup>1</sup> WG Minister recently announced in the Senedd that Short Break Carers Funding will be extended to March 2029, however we are still waiting for written confirmation.

### 3 Approach for Evaluation and Review of RIF Funded Schemes

- 3.1 Prior to the Board meetings the West Glamorgan Team reviewed the performance and finance data along with the story of change, any queries were then picked up with the project leads . The West Glamorgan Team analysed and summarised the data and story of change information.
- 3.2 The basis of the evaluation and review are undertaken utilising the following documentation:
- Finance and Performance Data
  - Milestone Update / RAG rating and rationale provided by the project lead
  - Story of Change Report
- 3.3 The West Glamorgan Team RAG rated the schemes based on the performance and finance data, milestone update and the story of change. This RAG rating was in draft and panel members could dispute it if they felt it needed to be changed.
- 3.4 The RAG rating for the review and evaluation was as follows:

	<b>RAG Rating</b>
<b>Green:</b>	Project on track in terms of resources, finances and outcomes
<b>Amber:</b>	Some risks in relation to resources, finances and/or outcomes, though mitigations in place
<b>Red:</b>	Issues to delivery of project with limited or no resolution in place

- 3.5 RIF funded schemes in year 2 acceleration were due formal evaluation to decide whether to continue to fund the project after a pilot and test period. There were very few evaluations due given there were only 14 schemes in year 2. Summary of the schemes due an evaluation and light touch review are as follows:

**Table 2:**

<b>Programmes</b>	<b>Full Evaluation</b>	<b>Light Touch Review</b>	<b>Total No. of Projects</b>
Carers	0	22	<b>22</b>
CYP	0	22	<b>22</b>
Mental Health	3	23	<b>26</b>
LD	9	12	<b>21</b>
Communities and OP	0	18	<b>18</b>
Neurodiverse	0	2	<b>2</b>
Dementia	0	17	<b>17</b>
<b>Total</b>	<b>12</b>	<b>116</b>	<b>128</b>

- 3.6 The formal evaluations included the following:
- **Summary of Evaluation:** This included draft scoring for the performance measures and a RAG rating for deliverability
  - **Project Overview:** This includes the full description of the project from the original project proposal which was the basis of the funding
  - **Finance Section:** This includes how long the project has been funded for and the spend to date compared to the budget to end of quarter 2

- **Story of Change:** This provides narrative in terms of the story of change which provides additional qualitative information about the project and provides the information being requested by WG. This information will feed into the programme story of change
- **Performance:** The results-based accountability in terms of the how much, how well and difference made

3.7 For the review of the other RIF funded schemes in year 1, 3, 4, 5 a light touch review was utilised. The quarter 2 returns were reviewed, and RAG rated based on performance/ impact, finance and deliverability and story of change. Only the amber and red RAG rated schemes were reviewed in the funding panel / Boards.

#### 4 Process for Evaluation and Review of RIF Funded Schemes

4.1 This year decision was made to review the RIF funded schemes in the Board meetings instead of holding panels in order to reduce the number of meetings that partners attended.

4.2 All RIF evaluations and reviews were approved through the approved governance and went through to the relevant Population Programme Boards during November, with the exception of Communities and Older People, as follows:

Programme	Date of Board Meeting
Learning Disability	4 <sup>th</sup> November 2025
Children and Young People	4 <sup>th</sup> November 2025
Emotional Wellbeing and Mental Health	5 <sup>th</sup> November 2025
Carers	10 <sup>th</sup> November 2025
Neurodiverse	11 <sup>th</sup> November 2025
Dementia	25 <sup>th</sup> November 2025
<i>Communities and Older People</i>	<i>19<sup>th</sup> December 2025</i>

4.3 All meetings were quorate.

4.4 The C&OP Board meeting was postponed from 28<sup>th</sup> November to 19<sup>th</sup> December given the Chairs were unavailable for the meeting. Given the C&OP Board includes senior representation it is proposed that the decision for continuation of RIF funding is delegated to the C&OP Board on 19<sup>th</sup> December. This will ensure that we are able to confirm the funding to leads before Xmas.

#### SAB3 Members to agree to this approach

#### 5 Summary of Regionally Funded Schemes Approved through the Process

5.1 The below table shows the original RIF funding per Programme in 24-25, the recommended RIF funding for 25-26 and the reason for differences.

Programme	Funding 25-26	Funding 26-27	Difference	Comments
Carers	£868,041	£830,077	£37,946	All schemes approved With exception of one third sector scheme which is on hold given there is an investigation underway following the outcome of a grant monitoring visit.

				The funding for this scheme has been excluded for now.
CYP	£2,898,533	£2,898,533	£0	All schemes approved
LD	£795,681	£776,110	£19,571	All schemes approved 'Count Me In' Project delivered by Swansea Council closed end of quarter 2 given project did not progress as planned.
Mental Health	£1,148,217	£1,039,373	£108,844	All schemes approved, with 2 projects funded for less than a year. One project (5TF) funded for 3 months and one project (19MH) funded for 6 months; details included in <b>appendix 1</b> Funding for the Clinical Lead for MH due to expire end of March 2026
Dementia	£1,269,119	£1,243,739	£25,380	All schemes approved Sporting Memories Research Project, delivered by the Ospreys has ended given the research was completed.
Neurodiverse (ND)	£16,096	£16,096	£0	All schemes approved
<b>Sub Total</b>	<b>£6,995,687</b>	<b>£6,803,928</b>	<b>£191,741</b>	
Communities and Older People including Social /Micro Enterprise	£9,606,611	TBC		Not yet reviewed. Delegate decision making to C&OP Board on 19 <sup>th</sup> December
<b>TOTAL</b>	<b>£16,602,298</b>			

5.2 **Appendix 1** includes the full list of RIF funded schemes for all Programmes.

5.3 Detailed information is available on request which includes the rationale for the decisions made. This detailed information has been shared with all Boards.

5.4 There were a large number of projects that were supported with the proviso that actions identified by panel members were picked by project leads. These actions will be included in the correspondence that confirms funding for 26-27, linked to the terms and conditions.

## 6 Key Points / Lessons Learned

6.1 There were a number of issues and lessons learned from last year's RIF review, with the majority of them being addressed as follows:

Issues	Action	Status
The flat rate of RIF funding, along with additional NI costs, will impact projects	Proposed that a project update template be circulated to project leads asking them to confirm the revised financial breakdown, performance	<b>Completed</b> Shared with all Programme Boards Summary shared with SAB

	measures, and any risks associated with the flat rate of funding. This information will be collated and shared with Programme Boards for greater visibility.	Information shared with Welsh Government in order to inform the future funding model
Many regional projects report low numbers of people supported in NPT. The usual split is 60/40 for Swansea/NPT. Collation of the split of NPT and Swansea numbers commenced last year. Some regional projects are BAME organisation where you would expect to see lower %s given the population cohort is smaller. Some of these projects have offices based in Swansea, which may have accessibility issues	Liaise with these regional projects to understand their accessibility for NPT residents, their plans to ensure accessibility, and how they promote the schemes to NPT residents.	Meetings held with all project leads with regional projects with low NPT figures to agree actions of how they can increase uptake.  All Programme Boards received update on all regionally funded schemes, with majority of schemes seeing improvement in the % of people supported in NPT  This will be continued to be monitored and reviews
Declaration of interest process needs to be formalised. The process is complicated in some instances, for example, a couple of RIF funded projects have funding allocated to all statutory partners, for example, Community Equipment Store.	Documenting the declaration of interest process will help clarify the process	<b>Completed</b> Declaration of interest policy completed, shared and followed by all Boards
Story of change template needs further development  Questions should be added about location and accessibility to ensure a good understanding of the service offer in NPT.	Revise and streamline Story of Change template	<b>Completed</b> Template streamlined and simplified
There is currently no validation of performance measures for and finances for RIF funded projects	Grant monitoring process to commence with a rolling programme for all RIF schemes.	<b>Commenced</b> Process has commenced and one visit has taken place with another visit scheduled.

## 6.2 Other lessons learned this year are as follows:

- **Lack of a strategic approach to project review**

An exercise was undertaken to assess cost per beneficiary, comparing the number of people supported with the percentage of investment for projects, utilising the same intervention levels. However, this analysis could not be applied in the RIF review because the funding allocated to

each project does not reflect its actual cost. Most projects receive additional resources through core funding, reserves, other grants, and fundraising, making direct comparisons unreliable. Another complicating factor is that some projects provide multiple interventions.

- **Clarify and further develop national performance definitions**

There is currently some ambiguity among project leads regarding existing definitions, which requires resolution to ensure consistency. This applies to the national approach across Wales.

- **Implement proportionate performance reporting**

Introduce a more tailored approach to reporting, for example applying fewer measures for smaller projects to reduce unnecessary complexity.

- **Review the necessity of certain performance measures**

Some measures are not currently being utilised in the assessment process for future funding, indicating a need to evaluate their relevance and potential removal.

- **Review process for performance measures**

The recent review of performance measures required significantly more time during the Board meeting compared to the original approach of conducting reviews within a smaller panel, suggesting a need to reassess the process for efficiency.

- **RAG Ratings**

Some schemes rated as Amber had only one minor issue, while others had several concerns. To address this, a four-tier RAG rating system will be introduced next year to provide clearer differentiation and improve decision-making.

## 7 Key Risks

- 7.1 Statutory partners are experiencing significant overspends this year, and the financial outlook for 2026-27 remains uncertain. Third sector providers face similar challenges, as increased costs for staff, National Insurance, and overheads are not covered. These organisations may need to reduce costs / staffing, which will impact the services provided to people. Consequently, local services may be reduced, further affecting the wider system.

**Mitigation:** Partners engage in discussions about potential service cuts to address and plan for any impacts.

- 7.2 Future uncertainty of RIF funding poses a significant threat to the sustainability of services currently supported. At present, £17.3m worth of health and social care services are funded through RIF. Any reduction or withdrawal of this funding could lead to service disruption, impact on vulnerable populations, and increased pressure on core budgets.

**Mitigation:** Continue engagement with Welsh Government and partners to confirm future RIF funding and timescales, with potential contingency planning to safeguard critical services.

- 7.3 The third sector is currently facing significant pressures due to financial constraints. Many third sector organisations are experiencing higher demand for their services while also dealing with rising operational costs and additional NI costs. Increasing number of grant funders are freezing their grant pots, some grants have been cut, and public giving is down – these factors have compounded the financial strain on organisations.

The financial pressures are leading to a reduction in services, which affects the ability of these organisations to provide essential support. This is particularly concerning as the third sector plays a crucial role in prevention and early intervention.

**Mitigation:** These pressures highlight the need for strategic planning and investment to ensure the sustainability and effectiveness of the third sector in supporting health and social care.

## **8 Recommendations**

- 8.1 To endorse the funding for the RIF funding schemes for 26-27 which are included in the attached **appendix 1**.
- 8.2 To agree that the decisions for the Communities and Older People RIF funding is delegated to the Board on 19<sup>th</sup> December.
- 8.3 To note that emails will go out to all project leads before Christmas confirming the continued funding for 25-26 .

## **9 Decision**

- 9.1 To approve above recommendations