



Old Luce Community Fund Six Year Report

1st October 2014 - 30th September 2020

1 About the Old Luce Community Fund and Panel

Old Luce Community Council established **Old Luce Community Fund (OLCF)** with Foundation Scotland in 2014, in order to create a single application and award structure for local groups in Glenluce, Dunragit and Auchenmalg; and a **single point of governance, administration and reporting** for the Community Council and fund donors. Funding streams from eight wind farms now contribute to the Old Luce Community Fund.

Foundation Scotland receives and processes applications, supports a local decision-making body, the Fund Advisory Panel, and provides governance and administration of funds held on behalf of the community.

The **Old Luce Community Fund Advisory Panel** is made up of two Old Luce Community Councillors and seven other volunteers with local knowledge and an interest in supporting the community.

The **current Panel members** are Lesley Goodchild (Chair), Boyd McIntosh, David Ferguson, Fred Murray (Old Luce Community Council), Ian Paterson (Old Luce Community Council), Marion Muir and Claire Hunter. A majority of Panel members have been involved since the fund's set up. Founding Chair Drew Sloan was replaced by Allan Ross who served in the role until April 2018 when Lesley Goodchild became Chair having joined the Panel along with Claire Hunter in 2017. Allan Ross stepped off the Panel in 2019.

The Panel meets approximately four times per year to make decisions on applications and other matters relating to fund governance. This has been the routine since the Fund was established.

Approved minutes of meetings can be found at:

<https://www.foundationscotland.org.uk/communities/funds/old-luce-panel-page/>

Following community action planning work in 2015/16, the Fund prioritises projects that deliver against the themes identified in the **Old Luce Research & Consultation Report**. These are: Connecting People; Enhancing Our Natural Environment; Improving Our Built Environment; and Jobs & Volunteering.





2 Income and expenditure

Table 1 below presents a summary of the overall position of the Old Luce Community Fund and each constituent Fund from the point at which the Fund was established with Foundation Scotland to 30 September 2020. The month and year each Fund commenced is noted in the Fund column.

The annual income for each constituent Fund is presented at Appendix 1.

Table 1: Overview of constituent funds contributing to the Old Luce Community Fund since 2014

| Fund | Income (from 10/14) | Grants paid or allocated | OLCF admin (FS, hall lets, publicity) | Endowment | Available funds 30/9/20 |
|-------------------------------|----------------------|--------------------------|---------------------------------------|----------------|-------------------------|
| Barlockhart (10/14) | £155,934.03 | £131,975.00 | £11,517.46 | £4,250 | £8,191.57 |
| Carscreugh (10/14) | £199,103.16 | £136,492.50 | £12,518.35 | £4,750 | £45,342.31 |
| SSE Artfield Fell (02/15)* | £71,719.98 | £58,498.65 | £6,985.19 | £1,500 | £4,736.14 |
| SSE Balmurrie Fell (02/15)* | £47,892.15 | £46,918.00 | £4,835.87 | £1,250 | -£5,111.72 |
| Greencoat North Rhins (04/15) | £23,187.40 | £18,034.00 | £98.00 | - | £5,055.40 |
| SPR Kilgallioch (09/16) | £541,135.38 | £308,708.00 | £27,313.96 | £13,250 | £191,863.42 |
| RES Glenchamber (10/16) | £109,624.52 | £90,263.70 | £6,162.75 | - | £13,198.07 |
| 2020 Airies (2/19) | £96,249.66 | £58,198.65 | £3,751 | - | £34,299.51 |
| Total | £1,244,846.28 | £849,088.5 | £73,182.58 | £25,000 | £297,574.70 |

There are some points to note from Table 1:

- The available balance of £297,574.70 does not include the contribution to Foundation Scotland for the 2019-20 period of £19,500 which is pending Community Council approval. The **administration and grant-making service** Foundation Scotland provides plus the ongoing Fund expenses for hall lets total just under **6% of the overall Fund value**.
- Fund balance also does not reflect D&G Council administered SSE Artfield & Balmurrie income which was due in 19-20 but arrived after the fund year ended (£13,856.33 and £8,462.06 respectively).
- The deficit figure for SSE Balmurrie Fell reflects the practice of allocating the full amount of any award at the point of grant acceptance following the Panel



decision but with due regard to when annual community benefit payments are due. The balance showing against Balmurrie Fell would not be a deficit had the projected income arrived on time.

- This allocation practice means that **multi-year awards are allocated the full sum at the outset** and funding is then ringfenced for that award/s. Ringfenced money is not available for other activity. This practice has **varying implications** – it puts the recipient organisation in a stronger position to secure match funding for projects (against the OLCF funding already secured) but it can also tie up Fund monies in projects that may take time to deliver. This is an issue the Panel is aware of; however up to this point there has not been a significant enough volume of competing proposals to require a different approach.
- Income projections for the coming year (1 October 2020 – 30 Sept 2021) anticipate further income of circa £337,000 from the eight constituent funds (including the LEDS payments from RES Glenchamber).
- In the sixth year of the OLCF, **total incoming funds surpassed £1,000,000** and it is possible that in year seven, total grants awarded will reach £1,000,000. This is a significant milestone for the Old Luce Community Council, the Fund Panel and the wider community. There may be merit in marking this in some way when Covid-19 related restrictions lift – for example by holding a celebratory community event which reflects on the extent to which the Fund is meeting the ambitions of the Community Action Plan. The Panel and Community Council may have other suggestions about how this milestone could be marked.
- The **OLCF Endowment** has demonstrated helpful growth in the first three years, and has a current balance of **£30,381.16**, however year four was negatively impacted in 2020 by the effects of the Covid-19 global pandemic (see Section 3 below).
- Since the establishment of OLCF **£849,088.50 has been awarded for projects** to benefit the community. Of this amount **£229,126.18 remains allocated** but not paid. This is where there are grant conditions in place that are still to be fulfilled; these may not always be in the control of the grantee. Allocated funds remain with Foundation Scotland until all grant conditions have been met and are ringfenced.
- The most significant award yet to be drawn down is to redevelop Brambles Café in Glenluce, awarded in November 2018, partially spent, with **a balance of £208,992.68 remaining** to be drawn down. The Fund Panel and the award holder, OLD T maintain communication about the project, which has faced a number of challenges to the plans for redevelopment.



3 The Old Luce Community Endowment

An endowment is a sum of money (capital) that is retained for long-term investment. The Old Luce Community Fund Panel, in consultation with Old Luce Community Council, established an endowment with Foundation Scotland for Old Luce in October 2016, with an initial investment of £25,000.

The financial return from this is reinvested for capital growth, with the intention that it will provide an income to the Old Luce Community Fund after the lifetime of the wind farm community benefit funds, which is expected to be around 25 years.

The endowment value at 30 September 2020 was £30,381.16 (£32,354.10 at 30 September 2019; £30,147.48 at September 2018 and £27,200.19 at 30 September 2017). The Endowment Fund was particularly impacted by Covid-19 in February and March 2020.

Due to projected demand on the grant-making fund and the impact of Covid-19 on investments, endowment was discussed at Panel in 2019 into 2020, but no further donations have been made into the endowment fund since the initial investment; this is due for review in the new fund year (2020-2021).

The Kilgallioch (Old Luce) Fund does make specific provision that up to 2.5% of the Kilgallioch annual allocation can be invested in an endowment and, in due course, Old Luce Community Council may wish to utilise this facility, in agreement with the Panel.

4 Funding Distribution and Awards

Since 2014 when the Old Luce Community Fund was established **50 awards have been made to 15 community organisations, with a total value of £849,088.50** for the benefit of residents in the Old Luce area. Table 4 lists the groups and number and total value of awards received.





Table 4: Groups that have received grants from OLCF

| Organisation | Awards | Total value of awards |
|------------------------------------|--|-----------------------|
| Old Luce Community Council | 8 (includes 3 separate micro grant awards but not withdrawn award for defibrillator) | £25,510 |
| Old Luce Development Trust | 24 | £744,075.50 |
| Glen of Luce Community Association | 2 | £9,000 |
| Glenluce Angling Club | 1 | £1,728 |
| Luce Valley Church of Scotland | 2 | £5,794 |
| Glenluce Mothers & Toddlers | 1 | £1,008 |
| Glenluce Parent Council | 2 | £1,960 |
| Glenluce Bowling Club | 1 | £1,500 |
| Glenluce Social Welfare | 2 | £12,426 |
| Furniture Project (Stranraer) | 1 | £5,713 |
| Wigtownshire County Golf Club | 2 | £35,000 |
| Headway Dumfries & Galloway | 1 | £700 |
| The Arthur Trail Association | 1 | £1,400 |
| Rhins Men's Shed | 1 | £2,774 |
| Newton Stewart Walking Festival | 1 | £500 |

The **Old Luce Development Trust** has received **24 of the 50 grants awarded** (48%) but 88% of all funding awarded. This is perhaps not surprising since the Trust was established as a critical action following completion of the Community Action Plan and is tasked with leading on implementing a diverse range of projects identified through that original consultation and planning process. This significant





and central role the Trust has to the use of the funds provided forms the subject of a separate paper.

Not all applications to OLCF are successful. In the last six years **58 applications have been made** (not including the 3 microgrants awards to OLCC); **8 have been rejected and 3 withdrawn**; reasons for refusals including projects being insufficiently planned or costed; limited evidence of need or limited benefit to the Old Luce community.

Following the Community Action Planning process the Fund was aligned to the four themes of **Connecting People, Enhancing our Natural Environment, Improving our Built Environment and Jobs and Volunteering**. Assessments of applications considered how the proposed project met with one or more of these themes. Appendix 2 shows the full list of awards made against each theme.

A **summary analysis of the Fund**, viewed through this perspective of Community Action Plan themes is presented below in Table 5.

Table 5: Distribution of awards across the Community Action Plan themes

| Theme | Number of awards | Percentage of awards | Value of awards | Percentage of spend |
|-----------------------------------|------------------|----------------------|-----------------|---------------------|
| Connecting People | 10 | 20% | £42,657.00 | 5% |
| Enhancing our Natural Environment | 8 | 16% | £100,495.70 | 12% |
| Improving our Built Environment | 16 | 32% | £480,445.00 | 57% |
| Jobs and Volunteering | 3 | 6% | £90,586.00 | 11% |
| Cross theme | 13 | 26% | £134,904.80 | 16% |

This analysis shows that the **greatest number of awards (16) are supporting activity to Improve the Built Environment** and with a corresponding high percentage (57%) of the funds so far available awarded under this theme. The two largest awards to date (the development of the DaPratos and Brambles sites) total £413,526 and which represents 86% of the sum awarded to the theme of Improving our Built Environment.





Eight projects funded to Enhance the Natural Environment received 12% of the funds available. This is perhaps explained by the larger size and scale of projects to improve both the Natural and Built Environments in an effort to deliver some strategic and legacy projects in this initial phase of the Fund.

The small number of projects aligned to the Jobs and Volunteering theme (3) nevertheless account for 11% of fund distribution. This is because this category includes the salary costs of OLD T staff which, under the guidance and direction of the OLD T Board, is responsible for implementing the many OLD T projects in progress.

5 Looking Forward

To maximise the value of the Fund and its role and effectiveness within Old Luce it may be helpful for the Community Council, the Panel, Foundation Scotland and the wider community to consider some or all of the following suggestions:

Identify and capture impact and learning to date

Old Luce Community Council and Foundation Scotland have pioneered a new structure and arrangement through which to administer multiple community benefit funds. Some aspects of this arrangement have worked well; some aspects have come to work less well, as demand on the Fund has evolved.

It could be helpful to take stock and reflect on achievements and challenges as part of reviewing of the Fund's purpose and priorities and how funding is made available in future years (see next two points). Part of this work could also involve better measuring the impact of funding awarded to date and the difference it is making to people's lives in Old Luce.

Review the Fund's purpose and priorities

Five years on from the Community Action Plan there would be value in worthwhile reviewing the extent to which the Plan is still current (and the extent to which it is being delivered) and following this, the role of the Fund in supporting the delivery of the Plan. This could potentially be delivered as a partnership piece of work between OLD T and the Fund. This could result in updating or reconfirming the Fund priorities and communicating this to the wider community.

Review how funding is made available

To date funds are distributed through an open, competitive process with four closing dates for applications. The Community Council operates a micro grant scheme through the year for smaller awards of under £500. Beyond these two





arrangements, there may be other means of distributing funding to further achieve community priorities and ensure greatest use of the Fund. A key change in approach for Old Luce may be the use of strategic, or targeted, grant-making and this forms the subject of a separate paper on fund distribution and OLDT.

Other examples of distributing differently operating in other communities include Education & Training Schemes or Apprenticeship Programmes. Others budget for particular priorities and commissioned organisations to deliver against these. Others run annual 'participatory grant-making' events where funding decisions are made by community members attending a celebratory community event.

Ensuring the Fund is accessible to all groups

Old Luce has an array of community groups of varying capacity, responsibility and ambition. It is important that the Fund is perceived as accessible to all groups who can benefit from it and that Fund information and material is kept vibrant, up to date and relevant to all. Foundation Scotland can be more active in fund promotion, using advertising, outreach events (digital if restrictions are still in place) and targeted promotion.

Ongoing Panel succession

There was an ambition in 2016 to have all acting Panel members replaced for 2019, the fifth year of the Fund and in keeping with the guidance in the Terms of Reference that Panel members serve for a minimum of two and a maximum of five years. This has been a challenge to achieve to date but all are keen to retain freshness and diversity on the Panel.



For further information about this Report or the Old Luce Community Fund please contact:

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Appendix 1: Overview of all income to 30th September 2020

| | | | | | |
|-----------------------|------------|--------------------|--------------------|------------|--------------------|
| Barlockhart | 30/10/2014 | £24,600.00 | North Rhins | 15/04/2015 | £5,085.89 |
| | 26/11/2015 | £24,790.99 | | 25/01/2016 | £3,431.41 |
| | 15/11/2016 | £25,297.13 | | 12/07/2017 | £4,521.00 |
| | 17/11/2017 | £26,271.20 | | 19/02/2018 | £3,296.00 |
| | 08/11/2018 | £27,130.67 | | Interest | £9.10 |
| | Interest* | £54.44 | | 11/03/2019 | £3,385.00 |
| | 11/11/2019 | £27,789.60 | | 03/04/2020 | £3,459.00 |
| | | £155,934.03 | | | £23,187.40 |
| Carscreugh | 31/10/2014 | £26,775.00 | Kilgallioch | 02/09/2016 | £76,000.00 |
| | 02/12/2015 | £26,913.03 | | 24/08/2017 | £19,321.43 |
| | 30/12/2016 | £27,346.67 | | 26/02/2018 | £71,250.00 |
| | 31/01/2018 | £28,302.92 | | Interest | £111.56 |
| | 31/12/2018 | £29,259.17 | | 05/03/2019 | £184,980.00 |
| | Interest | £46.45 | | 19/12/2019 | £189,472.39 |
| | 31/10/2019 | £30,060.00 | | | £541,135.38 |
| | 31/07/2020 | £30,399.92 | | | |
| | | £199,103.16 | | | |
| Artfield Fell | 24/02/2015 | £8,160.20 | Glenchamber | 28/10/2016 | £18,333.33 |
| | 26/10/2016 | £11,936.73 | | 28/10/2016 | £11,833.33 |
| | 26/10/2016 | £11,936.73 | | 30/10/2017 | £18,333.33 |
| | 31/07/2017 | £12,795.71 | | 04/12/2017 | £10,505.72 |
| | 12/10/2018 | £13,226.02 | | 24/01/2018 | £526.92 |
| | Interest | £20.38 | | 29/10/2018 | £19,350.84 |
| | 16/10/2019 | £13,644.21 | | Interest | £38.72 |
| | | £71,719.98 | | 08/03/2019 | £11,006.26 |
| | | | | 17/12/2019 | £19,696.07 |
| | | | | | £109,624.52 |
| Balmurrie Fell | 24/02/2015 | £7,500.00 | Airies | 20/02/2019 | £31,500.00 |
| | 26/10/2016 | £7,500.00 | | 29/07/2019 | £32,083.00 |
| | 26/10/2016 | £7,500.00 | | 20/08/2020 | £32,666.66 |
| | 31/07/2017 | £7,583.33 | | | £96,249.66 |
| | 12/10/2018 | £9,340.78 | | | |
| | Interest | £5.98 | | | |
| | 16/10/2019 | £8,462.06 | | | |
| | | £47,892.15 | | | |

*The addition of interest will cease from 2020 due to the disproportionate size and complexity of the work involved relative to the cost to Foundation Scotland and overall financial benefit to the Fund.



Appendix 2: Overview of all grants from the Old Luce Community Fund made to 30th September 2020 aligned to Community Plan themes

Key to themes:

| | |
|---|---|
| CP - Connecting People | NE - Enhancing our Natural Environment, |
| BE - Improving our Built Environment | JV - Jobs and Volunteering |
| X - Other or addressing more than one theme | |

| Grant Application: Grant Application Name | Project Description - Summary | Amount Awarded | Theme |
|---|---|-------------------|-------|
| Glen of Luce Community Association | To contribute to the cost of increasing/improving storage, increasing kitchen work surfaces, and fitting fire-retardant curtains in the hall. | £2,000.00 | BE |
| Glen of Luce Community Association | To contribute to the cost of upgrading Auchenmalg hall insulation, heating and kitchen, plus external groundworks to accommodate an outside boiler and storage area. | £7,000.00 | BE |
| Glenluce Bowling Club | To contribute to the cost of replacing three of the Clubhouse's doors, making wall repairs, and tarring the path surrounding the bowling green. | £1,500.00 | BE |
| Glenluce Parent Council | To add an outside awning to our outside space to allow the children to access outside activities during wet weather. | £1,000.00 | BE |
| Old Luce Community Council | To install roller blinds in Glenluce Public Hall. | £715.00 | BE |
| Old Luce Community Council | To fence around the new play park area to keep children in and dogs out. | £6,000.00 | BE |
| Old Luce Community Council | To purchase chairs and tables for Glenluce Hall and chairs for Glen of Luce Hall. | £3,000.00 | BE |
| Old Luce Development Trust | To pay for feasibility and planning work in respect of potential purchase and subsequent re-development of a derelict site in Glenluce, known as the Daprato's corner site. | £10,000.00 | BE |
| Old Luce Development Trust | To purchase and redevelop the property known as Brambles Café, Glenluce. | £231,135.00 | BE |
| Old Luce Development Trust | To commission a site valuation and title search on the old Dunragit shop site with the intention of building a community hub. | £1,630.00 | BE |



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|-----------------------------------|---|-------------|----|
| Old Luce Development Trust | To develop 21 Main Street, Glenluce (DaPratos corner) to create a village square. | £182,391.00 | BE |
| Old Luce Development Trust | To purchase the derelict site of 21 Main Street to create a community area. | £15,000.00 | BE |
| Old Luce Development Trust | To carry out condition surveys of the banking and retaining walls of the Lorry Park and structure of the Industrial Estate buildings. | £4,130.00 | BE |
| Old Luce Development Trust | To carry out a Topographical Survey and survey to identify underground services/utilities within the Lorry Park site. | £2,100.00 | BE |
| Old Luce Development Trust | To put out a tender for a specialist organisation to carry out a full options appraisal and compile a Business Plan for Lorry Park. | £10,000.00 | BE |
| Old Luce Development Trust | To pay for the hire of a private contractor to clean the public conveniences at Glenluce Public Hall for one year, at the end of which the cleaning and maintenance will become part of the overall hall operating costs. | £2,844.00 | BE |
| Glenluce Mother and Toddlers | To cover costs of hall fees for twice weekly meetings of mother and toddler group. | £1,008.00 | CP |
| Glenluce Social Welfare | To provide activities for senior citizens in the Old Luce area for the next 3 years, including a summer outing, a Christmas party and an additional outing each year. | £5,001.00 | CP |
| Glenluce Social Welfare Committee | To contribute to the costs of community outings over the next 3 years, including, summer outings, Christmas parties and theatre trips or other activities. | £7,425.00 | CP |
| Luce Valley Church of Scotland | To produce quarterly editions of the Luce Valley News over three years. | £2,580.00 | CP |
| Newton Stewart Walking Festival | To contribute towards the transport costs for participants taking part in the Walking Festival in May 2016. | £500.00 | CP |
| Old Luce Church of Scotland | To purchase and install audiovisual equipment. | £3,214.00 | CP |
| Old Luce Community Council | To purchase a barbecue for use by the people and community groups of OLCC area. | £1,395.00 | CP |
| Old Luce Development Trust | To cover initial running costs for the Trust and to pay for a Communication Platform. | £10,000.00 | CP |



| | | | |
|---------------------------------------|--|------------|----|
| Old Luce Development Trust | To purchase equipment for community cinema nights. | £8,760.00 | CP |
| Rhins Men's Shed | To purchase computers and hardware, and to pay for 1 years office running costs. | £2,774.00 | CP |
| Furniture Project (Stranraer) Limited | To fund delivery and collection of furniture and electrical items for members of the public in the Old Luce area. | £5,713.00 | JV |
| Old Luce Development Trust | To employ a Development Officer for three years. | £74,882.00 | JV |
| Old Luce Development Trust | To contribute to the costs of employing part-time administrator for 20 hours per week from July 2019-September 2021. | £9,991.00 | JV |
| Glenluce Angling Club | To erect a nature look-out shed and make a new path to the shed. | £1,728.00 | NE |
| Old Luce Development Trust | To enable the transfer of land, currently owned by the Wemyss Estates, to the Old Luce Development Trust. | £2,622.00 | NE |
| Old Luce Development Trust | To improve the area around the Back Burn in Glenluce, including replacing the old bridge. | £22,674.00 | NE |
| Old Luce Development Trust | To develop a Woodland Management Plan for Balkail Wood. | £4,303.70 | NE |
| Old Luce Development Trust | To create a footpath connecting the two communities of Glenluce and Dunragit. | £32,768.00 | NE |
| The Arthur Trail Association | To fund an information board at Dunragit that ties this area into the Arthur Trail. | £1,400.00 | NE |
| Wigtownshire County Golf Club | To replace four mowers. | £25,000.00 | NE |
| Wigtownshire County Golf Club | To contribute to the cost of replacing the Club's current tractor. | £10,000.00 | NE |
| Glenluce Parent Council | To purchase two bookcases and 101 books for Glenluce Primary School. | £960.00 | X |
| Headway Dumfries and Galloway | To assist people in understanding their acquired brain injury, increase confidence and build self-esteem. | £700.00 | X |



| | | | |
|----------------------------|--|------------|---|
| Old Luce Community Council | To purchase and install a defibrillator for the village of Glenluce. | £2,400.00 | X |
| Old Luce Community Council | To provide a micro-grant scheme for the local community. | £2,000.00 | X |
| Old Luce Community Council | To provide a micro-grant scheme for the local community. | £5,000.00 | X |
| Old Luce Community Council | To provide a micro-grant scheme for the local community. | £5,000.00 | X |
| Old Luce Development Trust | To operate and maintain Glenluce Public Hall for a further two years to improve this community facility and increase access to leisure activities and services provided on site. | £30,967.00 | X |
| Old Luce Development Trust | To provide high quality Christmas lights in Glenluce and Dunragit, including purchase of lights and associated electrical works. | £38,537.65 | X |
| Old Luce Development Trust | To support the operating costs of Glenluce village hall for two years. | £17,512.00 | X |
| Old Luce Development Trust | To pay for one year's operational costs for the Old Luce Development Trust. | £10,000.00 | X |
| Old Luce Development Trust | To undertake repairs to Christmas Lights. | £1,104.00 | X |
| Old Luce Development Trust | To carry out public consultation, identify design options and develop a business plan for upgrading the GP Surgery in Glenluce. | £17,250.00 | X |
| Old Luce Development Trust | To purchase equipment and services in order to upgrade one room within Glenluce Public Hall into a well-equipped meeting room facility that will be available to groups and organisations for use. | £3,474.15 | X |