



Unlock our Future Fund

Fund Strategy

February 2022

1 Introduction

The purpose of the Fund Strategy is to set out how the Fund will operate and the criteria the Fund Panel will use when making decisions on awards. The Fund Strategy also provides guidance to organisations applying to the Unlock our Future Fund.

The Panel recognises the need for flexibility in considering how best to structure a Fund that will be fit for purpose in 20 years' time. The Fund Strategy will therefore be reviewed by the Panel annually so as to ensure it continues to meet the evolving needs and aspirations of the communities in the Fund area of benefit.

2 Background

The European Offshore Wind Deployment Centre is owned and operated by Aberdeen Offshore Wind Farm Limited, a subsidiary of Vattenfall, which has committed to a community benefit scheme to improve communities across Aberdeenshire and the City of Aberdeen.

The Unlock our Future Fund provides £150,000 per annum (as at Year 1 – 2019), tracking the Retail Price Index, for the life of the wind farm, which is expected to be at least 20 years.

The Fund is administered by Foundation Scotland, an independent grant-making charity.

3 Fund priorities

The ambition of the Unlock our Future Fund is to support a clean energy future for local communities ensuring a legacy.

The Fund will support charitable activity that addresses the following priorities:

- **Contribute to a climate smarter world with sustainability at its core.**
- **Invest in community facilities and activities that are fit for the future and are environmentally sustainable, especially community spaces and transport.**
- **Support creative solutions.**
- **Ensure a legacy (lasting impact) which brings clear benefit to the local community.**

All applications **must meet three of the four priorities** in order to be eligible for consideration. The strongest applications will meet all four priorities.

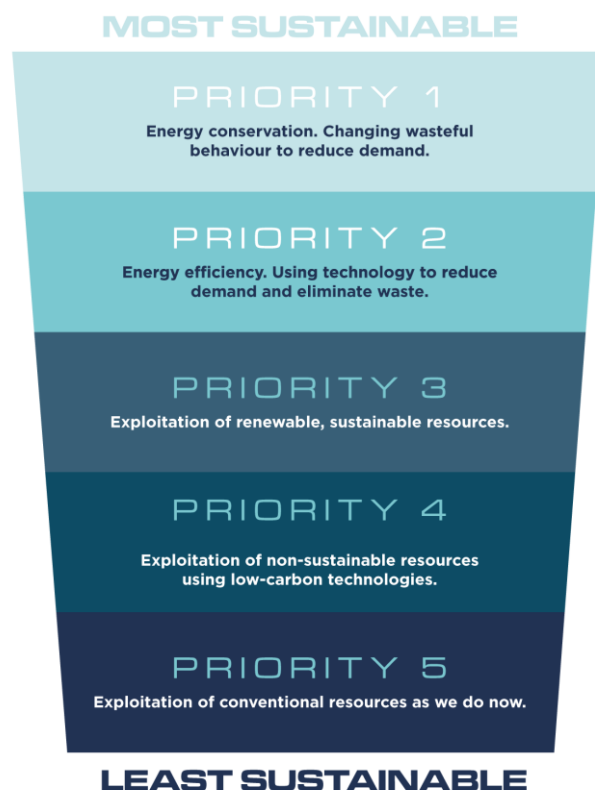
4 Blackdog

The substation host community in Blackdog has access to an annual ring-fenced amount. £15,000 (index-linked) annually, 10% of the overall scheme, is available to Blackdog for projects or activities that meet the criteria of the Fund. Such applications must be for activity benefiting Blackdog, although organisations based outside Blackdog are eligible to apply.

5 Fund cross-cutting themes

The Panel will take into account the following additional factors when making decisions. It is recognised that they may not all be relevant in every case, but if some of them can be achieved, then the application will be stronger.

- Taking a holistic approach which takes into consideration the **'energy hierarchy'**. This emphasises the importance of reducing energy demand as well as investment in renewables in moving towards a low carbon future.



- **Local procurement:** local suppliers of goods and services should be

used, where appropriate and feasible.

- **Strengthening community partnerships:** partnership working will be encouraged.
- **Capacity building locally:** projects should build the skills and knowledge of group members or other local people connected with the project.
- **Leverage or match funding:** while match funding for an application to the Fund is strongly encouraged, it is not essential. However, if funds are available from other sources (such as grants and 'cash back' schemes available for the installation of renewables, previously administered by Zero Waste Scotland), applicants will be expected to have applied for this funding.
- **Enhancing quality of life for all:** Applications should demonstrate how the benefits of the project will assist in improving the quality of life directly for the beneficiaries of the project, and indirectly for other residents in the area of benefit. Projects should be designed to ensure that no undue barriers to participation are placed in the way of those less advantaged in the area of benefit.

6 What level of grant can be awarded?

There will be two levels of awards:

- Small grants of up to £2,000.
- Large grants of between £2,001 and £15,000 in any one year, with a maximum award of £30,000 over three years (with £15,000, £10,000 and £5,000 as the maximum sums in years one, two and three respectively).

Organisations which have previously received awards from the Fund may make repeat applications. However, where the repeat application is for a previously funded project, the Panel may take previous awards into account when deciding on a maximum award. For example, if an applicant has previously been awarded £15,000 for phase one of a building improvement, and then applies for £30,000 over three years for phase two and three of the works, the Panel may decide to limit the second award to £15,000, bringing the total awarded for the project to £30,000.

If an applicant has received a small grant to fund feasibility work on a project, an application for the full maximum award of £15,000 in any one year or £30,000 over three years may subsequently be made.

Application forms for small grants require less information and decisions will be made more quickly (see section 9).

7 Eligibility

To be eligible to apply for a grant, applicants are expected to:

- Have a constitution (governing document or set of rules) and be set up on a not-for-profit basis. However, applicants do not need to be registered charities to apply.
- Provide their latest set of accounts signed by an independent / third party or, if the group has been operating for less than twelve months, they should provide a budget projection for the first year of operation.
- Provide a safeguarding policy, if the project involves working with children or vulnerable adults.

The following are not eligible to apply:

- Commercial businesses;
- Individuals;
- Informal groups that do not have a constitution.

Although groups may make more than one application each year, only one award (which may be a multi-year award) will be made in any Fund year. This is to try and ensure that there is a wide spread of grants to a diverse range of eligible organisations and local communities.

8 What kinds of things can and cannot be funded?

Applicants are encouraged to contact the Fund Adviser at Foundation Scotland for an informal discussion about their project before submitting an application.

Provided that the other Fund criteria are met, awards can support a wide range of costs and activities. The preference is for new activity to be funded i.e. applicants should demonstrate what additional activity will take place beyond

that already happening. If an organisation is requesting grant support for an established activity or project, the applicant needs to clearly explain what has changed to mean that grant support is now required from the Unlock our Future Fund.

Where applications relate to improvements to the energy efficiency of buildings, it is strongly recommended that applicants seek advice from the Business Energy Scotland service run by the Energy Saving Trust, which is replacing Zero Waste Scotland's business support service in April 2022. This provides free, independent advice which can help to identify the best options to be followed and the likely costs and benefits of each option.

Grants cannot support the following types of activity:

- Projects that do not take account of their environmental impact or do not have a positive environmental impact;
- The advancement of religion or politics (see below for further details);
- Activities which are deemed to be the responsibility of statutory authorities (see below for further details);
- Grants to individuals;
- Projects benefiting primarily those residents outwith the area of benefit.
- Activities contrary to the interests of Aberdeen Offshore Wind Farm Limited, Vattenfall or its subsidiaries;
- Activities likely to bring Foundation Scotland, Vattenfall, Aberdeen Offshore Wind Farm Limited or its subsidiaries into disrepute;
- Anti-renewable energy / wind farm activities;
- The repayment of loans or payment of debts;
- Costs already incurred or activities that will take place before the Panel has made a decision on an application (retrospective funding).

Supporting activity that might be deemed a statutory responsibility:

Public agencies such as schools, health or police services are generally ineligible.

Activities that take place on the school estate, during school hours and with only school pupils are not eligible for an award. Activities run on, and equipment for use in, the school estate outside of school hours may be eligible. Projects designed specifically to improve the condition of the school estate are unlikely to be funded e.g. solar panels on a school roof.

The key is that the applicant can demonstrate that the proposed project is additional to mainstream statutory provision and budgets and the work would

not be undertaken without funding from another source. However, determining whether applications are additional to statutory provision can be complex. As part of the assessment process, Foundation Scotland will consider on a case-by-case basis whether a particular project is additional to statutory provision and will report on their findings in the assessment report that is provided to the Panel.

Supporting religious bodies or groups connected with such bodies:

Although it is a charitable purpose, this Fund does not fund projects that promote religious belief ('the advancement of religion'). This means projects relating to the core activities of religious organisations will not be funded, even if they are charities.

However, the Fund can make grants to such organisations for projects that benefit the wider community without excluding anyone on religious grounds. For example, the Fund can assist with sustainable improvements to a hall owned by a religious body and accessed by various groups where religious affiliation or practice does not present a barrier to groups wishing to use the facilities. Ideally, the service or facility in question will be widely promoted to other groups (non-religious or of other religious affiliation) and/ or already accessed by these.

The Fund will not normally make grants towards the construction, alteration or restoration of buildings or associated features whose primary purpose is worship, e.g. replacement of stained-glass windows in churches, unless there is sustainable environmental improvement in doing so, or if the improvement is carried out in a particularly creative way in line with the focus of this Fund.

Supporting activity that takes place outwith the area of benefit but which benefits or involves those living within it:

This will not be funded. All activity must take place within the boundaries of Aberdeen City Council or Aberdeenshire Council.

The Panel has decided that there will be a presumption against funding staff salaries, especially existing staff for which funding elsewhere has been lost. However, the costs will be allowed of sessional workers i.e. someone who is not employed by the applicant but is paid for carrying out work on an hourly or similar basis e.g. a tutor conducting computer coding classes one evening per week.

One-off events or trips are unlikely to be funded unless there is shown to be a clear lasting legacy as a result.

As Foundation Scotland is a charity registered in Scotland, all grants made through it must be charitable, so the Fund cannot support activities that are not charitable in nature. This does not mean that the applicant must be a registered charity with the Office of the Scottish Charity Regulator (OSCR), and many organisations in Scotland carrying out charitable activity are not registered. Sections 7 and 8 of the Charities and Trustee Investment (Scotland) Act 2005 sets out the definition of charitable activity: <https://www.legislation.gov.uk/asp/2005/10/part/1/chapter/2/crossheading/the-charity-test>

Details of awards in Year 1 to 3 of the Fund are given in Appendix 1 in order to show the type and range of initiatives the Panel have funded to date.

The Panel commonly receives more applications than it has funds available to distribute and therefore is only able to fund a limited number of applications.

9 Method and frequency of grant-making

The Panel has chosen to adopt an open grant-making process i.e. applications for grants are open to all eligible groups in the Fund area of benefit to deliver projects meeting the priorities of the Fund.

One grant-making round will be operated in each year.

Applications for small grants will be decided on within six weeks of the application deadline. Applicants may be contacted by Foundation Scotland to clarify aspects of the application.

Applications for large grants will go through a two-stage process. The application will initially be assessed by the Panel against strategic priorities. If shortlisted, the application will then undergo a full assessment for consideration by the Panel approximately 12 weeks after the application deadline.

Shortlisted applicants should expect to be contacted by Foundation Scotland for an assessment interview. This will be carried out over the telephone or by video conference.

10 Measuring the difference the Fund is making

As a minimum, completion reports are required from awardees at the end of the grant period, though multi-year awards will require a report at the end of each funding year, prior to the next year's grant being released. Where practicable, projects will be asked to provide monitoring information on the environmental benefits of their award, such as energy savings, waste reduction or changes to modes of travel. As many impacts are likely to be long-term, information may be requested from funded projects beyond the submission of the completion report.

The Panel, with support from Foundation Scotland, will review the performance of the Fund annually including the extent to which it has contributed to the Fund priorities and any potential changes that might increase the success of the Fund. A more fundamental review of the Fund, its success in meeting its purposes and priorities, and its impact on the area of benefit will be carried out at a frequency to be agreed with the Panel but at least every three years.

Appendix 1

Funding Awards in Year 1

In 2019, the Fund received 33 applications totalling £415. 11 awards were made:

Applicant Name	Amount Awarded	Grant Summary
Westhill and District Men's Shed	£1,000	To purchase an electric arc welder, hydraulic mobile lift table and steel storage cupboard, to help in their work in recycling lawnmowers.
Strachan Village Hall	£10,000	To contribute to the cost of installing three wall-mounted air source heaters.
Meldrum Amenities Improvement Group	£15,000	To replace the group's old diesel tractor with a suitable electric utility vehicle.
Aboyne and District Men's Shed	£8,967	To contribute to the building of the Aboyne and Mid Deeside Community Shed through the provision of solar panels.
Aberdeenshire Sailing Trust	£15,000	To contribute to the purchase of an electric vehicle to tow the group's boats and move equipment and staff between venues.
Community Energy Scotland Limited	£15,000	To fund community engagement sessional staff who will work to build the capacity of six local community organisations across Aberdeen and Aberdeenshire to develop innovative community energy projects and build the sustainability of local community facilities.
Fittie Community Development Trust	£8,536	To contribute to the purchase and installation of an environmentally sustainable heating system in the community hall.
Tarland Development Group	£15,000	To contribute to the development of an education facility in a walled garden just outside Tarland which will benefit several local groups which lack sufficient facilities at present.
PrototAU	£5,000	To contribute to costs associated with the group's participation in the Shell Eco Marathon 2020 and improving the hydrogen-fueled vehicle's performance.
Tigh a'Chomainn Camphill Limited	£10,000	To contribute to the purchase of an electric vehicle.
Huntly and District Development Trust	£10,000	To fund a feasibility study into the development of a network of community owned electric car charging points.
	£113,503	Total Awarded

Funding Awards in Year 2

In 2020, the Fund received 24 applications totalling £314k. 12 awards were made:

Applicant Name	Amount Awarded	Grant Summary
Aberdeen Association of Social Service (VSA)	£10,000	To part-fund solar panels for a new residential mental health care facility in Aberdeen.
Alford and District Men's Shed	£15,000	To optimise the renewable energy system for Alford Men's Shed by installation of a solar thermal and battery storage, enhancing a community facility used by older men and the wider community.
Buchan Community Farm LTD	£5,500	To fund a switch to renewable energy through installation of Solar PV, supporting the Community Farm's work with vulnerable young people.
Buchan Dial-A-Community Bus	£15,000	To fund the purchase of a new seven seater electric vehicle which will be used to provide free-of-charge, accessible and suitably timed transport to those who cannot afford public transport or who find it difficult to access public transport for a variety of reasons.
Camphill Rudolf Steiner Schools Ltd	£5,500	To fund the purchase of one cargo e-bike to create a new and environmentally sustainable transportation method for the students to deliver food and household products to the School's residential houses.
Community Food Initiatives North East	£5,500	To fund the purchase of a new electric cargo bicycle as part of CFINE's 'Vegaroonitoun' service providing access to fresh food for people in Aberdeen who experience food poverty, are isolated, and/or experience health, mobility or other barriers.
Newburgh Public Hall	£13,860	To upgrade the hall heating system through installing an air source heat pump, supporting a community facility.
Peterhead Sailing Club	£13,822	To fund installation of solar panels, a battery and an electric car charging point, to support the work of the sailing club with a range of groups including young people and those with disabilities.
ProtoTAU	£1,690	To contribute to the development and build of the prototype hydrogen car taking part in the 2021 Shell Eco-Marathon and the travel costs of the ProtoTAU team of students from Aberdeen University.
Tarland Development Group	£8,404	To contribute to the costs of constructing an education facility, in particular funding the added cost of a living roof.
Tarves Parish Church	£15,000	To fund an air source heating system as part of the redevelopment of Tarves Youth Hall.
The Barn (Woodend Arts Ltd)	£15,000	To replace and upgrade Stage Lighting and House Lights from halogen to LED in a community arts space.
	£124,276	Total Awarded

Funding Awards in Year 3

In 2021, the Fund received 42 applications totalling £555k. 17 awards were made:

Applicant Name	Amount Awarded	Grant Summary
Aberdeenshire Sailing Trust	£9,316	To fund an electric outboard motor, battery and charger for the Trust's small rescue boat based at Peterhead, replacing an 8hp conventionally fuelled outboard.
Blackdog Residents Association	£4,440	To fund the first phase in site investigations, including a topographical survey and utility scan, required for the design and construction of a pedestrian bridge to access Blackdog beach.
Bonnymuir Green Community Trust	£10,000	To fund the repair of the clubhouse roof, including the installation of a sedum matting living roof to the main flat roof section to reduce energy losses and increase biodiversity.
Camphill Wellbeing Trust	£4,200	To fund energy efficient lighting in the sports hall of the Compass development.
Camphill Rudolf Steiner Schools	£5,074	To introduce a hot composting system which would eliminate the need to purchase compost from external sources, significantly increasing the sustainability of the Murtle Estate organic food and herb production.
Culter & District Men's Shed	£1,341	To fund purchase of materials to insulate the gable ends of the men's shed and so improve energy efficiency of the building.
Earth & Worms	£5,000	To provide greener facilities and improve access for volunteers by installing a compost toilet in the community garden for the benefit of the local community.
Fittie Community Development Trust	£15,000	To fully insulate the community hall and replace the windows in order to reduce energy consumption, maximise the effectiveness of the air source heat pump and raise climate awareness in the community.
Girlguiding Kincardine & Deeside	£2,000	To part fund a feasibility study relating to the new Sheiling#2 Girlguiding residential centre in Braemar. The objective is to further the development of an exemplar zero carbon building providing facilities for Girlguiding groups and the wider community.
Meldrum Amenities Improvement Group	£5,349	To fund a solar PV system to provide the power for the electric utility vehicle and its water pump for maintaining floral displays.
Newburgh Public Hall	£15,000	To fund purchase and installation of an 8kW photovoltaic array, linked to a Tesla Powerwall 2 battery unit to improve energy efficiency and demonstrate the technologies to the wider community.

Panthers Basketball Club	£2,000	To fund solar lighting on the outdoor basketball and netball courts at Mineralwell Park in Stonehaven to allow for greater access and usage, by Club members and the wider community.
Port Erroll Public Hall	£7,262	To part fund the installation of solar PV and battery storage and at Port Erroll Public Hall, and hence reduce the running costs of the hall.
Stella's Voice	£15,000	To fund the purchase of an electric Nissan E-NV200 delivery van for use in Aberdeenshire and surrounding area for the collection and delivery of larger items of furniture and household goods and the collection and distribution of food provision to those in need.
University of Aberdeen	£1,872	Feasibility study exploring the potential of scaling up microgeneration from Vertical Axis Wind Turbines (VAWT) retrofitted into existing public and private infrastructure.
Woodside Sports Complex	£5,853	To fund upgrades to the internal clubhouse lighting and floodlighting, replacing all current lighting with LED and replacing mobile floodlights with fixed LED floodlights, in order to improve energy efficiency and effectiveness of the lighting.
Zero Carbon Daviot	£2,000	To fund a feasibility study into retrofitting three property archetypes found in the Daviot area, as a precursor to development of a community-led retrofit programme.
	£110,707	Total Awarded