



# **Unlock our Future Fund**

## **Fund Strategy**

**January 2023**

## 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 fund benefiting the communities of Aberdeenshire and the City of Aberdeen.

The Unlock our Future Fund provides £150,000 per annum (as at Year 1 – 2019), increasing with inflation (as measured by 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 fund will support charitable<sup>1</sup> activity that addresses the following priorities:

- **Contribute to a climate smarter<sup>2</sup> 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.**

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<sup>1</sup> The applying organisation doesn't have to be a registered charity, but the aim of funded activities must be charitable, as defined by OSCR [here](#).

<sup>2</sup> There is no widely agreed definition of 'climate smart'. The use of the term reflects the donor's overarching strategic priority to 'power climate smarter living' by ending the use of fossil fuels within one generation. For an application to be 'climate smart' the panel would expect to see activities which reduce greenhouse gas emissions, particularly CO<sub>2</sub> either through saving energy and/ or renewable generation.

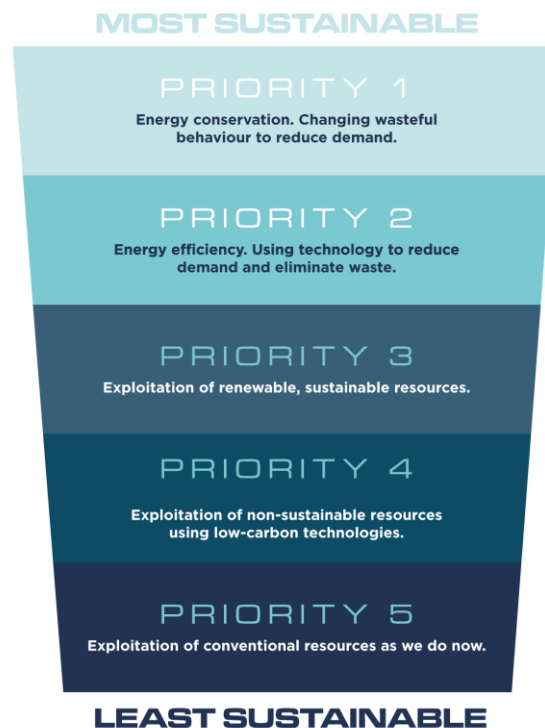
- **Support creative solutions<sup>3</sup>.**
- **Ensure a legacy (lasting impact) which brings clear benefit to the local community.**

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 Additional criteria

The fund has been heavily oversubscribed since its launch. The panel will give priority to applications that show some or all of the following:

- 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. The most sustainable projects (priority 1 in the diagram below) are those which conserve energy and reduce energy demand. The energy hierarchy is explored further in this [video](#). In practice, this means that the panel are unlikely to support a project which is installing renewable energy generation in a building which has inadequate insulation where no actions are being taken to improve insulation.



<sup>3</sup> The fund panel is keen to support activities which are new to the organisation or new to a community, in order to demonstrate and encourage the take up of 'climate smart' solutions. The solutions in question don't have to be technological solutions, it could be developing a different way of delivering a service or a new way of engaging with a community.

- **Making good use of other funding sources:** While funding from other sources is encouraged, it is not essential. The panel is unlikely to support projects which could be fully funded through other sources, such as [Local Energy Scotland's 'Let's do Net Zero'](#) or [Business Energy Scotland's cashback scheme](#). However, the panel are happy to consider applications for the balance of funding required when other funders do not meet 100% of the costs or specific expenditure items which are not eligible for consideration in other funders' programmes.
- **Sharing knowledge and experience:** the panel are keen to support applications which demonstrate a commitment to sharing knowledge and experience gained through the project with other community organisations and the wider public, in order to encourage wider adoption of climate smart approaches.
- **Community impacts:** applicants should explain the range of expected direct and indirect impacts achieved by a project, beyond direct carbon savings. This could include, but is not limited to, addressing disadvantage, increasing health / wellbeing, increased resilience (particularly in isolated communities), addressing poverty and cost of living challenges.
- **Organisational impacts:** applications should show how the project applied for will help the organisation sustain their activities and / or grow, for example, by reducing energy bills, developing partnerships, or demonstrating the feasibility of a planned future project.

## 5 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 are consistent with the priorities of the fund. Such applications must be for activity benefiting Blackdog, although organisations based outside Blackdog are eligible to apply.

## 6 What level of grant can be awarded?

There are 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.

Organisations who 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 building 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.

If a repeat applicant applies for an entirely new project, they may apply for the maximum grant. However, the panel is likely to prioritise applications from organisations who have not previously received funding.

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

## 7 Eligibility

Please see [Foundation Scotland's standard eligibility criteria](#).

## 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.**

A full list of all awards during the first four years of the fund is given in Appendix 1. In addition, case studies of successful projects are available on the [Foundation Scotland website](#).

Under the terms of the funding agreement with Vattenfall, the panel is not permitted 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 which 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.

In addition to the above strict exclusions, the panel are unlikely to fund:

- Projects which are unlikely to be able to start within 12 months of an award.
- Contributions towards general build or refurbishment costs. The panel wish to see applications which relate specifically to the 'climate smart' elements of the build / refurbishment, not the overall costs. This also applies to feasibility studies and applications relating to professional fees.
- Environmental improvement projects which have little, no or negative impacts on carbon emissions. For example, building new recreational paths or outdoor leisure facilities which would need to be accessed by car; litter picks and beach cleans; improvements to parks and open spaces unrelated to carbon saving or sequestration opportunities, such as playgrounds, skateparks and multi use games areas.
- Salaries of core staff. However, staff costs or costs of freelance staff specifically related to project delivery can be considered.
- Improvements to the energy efficiency of buildings or installation of renewables where the applicant has not made use of professional advice on the most appropriate options, such as [Business Energy Scotland's free building energy assessments](#). However, the panel is aware that delays are currently being experienced by groups wishing to obtain energy assessments, and will accept the submission of applications where an energy assessment has been requested but is yet to take place. If plans are amended in the light of receiving the energy assessment, these can be reflected in the application assessment carried out by Foundation Scotland (see below).

## **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 are made online via Foundation Scotland.

Applicants are normally expected to provide evidence of value for money, such as quotations, for costs over £300. See the [Foundation Scotland website](#) for further details. The panel recognise that it can be challenging to obtain quotations from suppliers and are prepared to consider applications unsupported by quotations as long as the applicant is in the process of securing quotations or has a clear procurement plan in place. If quotations are not available, it is likely that any award will be conditional on supplying further evidence to verify value for money.

Applications for small grants (£2,000 and under) 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 (over £2,000) 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. The assessment is an opportunity to provide further information, so that the panel have a thorough understanding of the project. If there have been changes to costs, or the applicant has received additional quotations or professional advice since submitting the application, the application can be updated at the assessment stage.

## **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.

## **11 Sources of advice and support**

Foundation Scotland will provide seminars and one-to-one advice for potential applicants. Details will be available on the [fund page of the website](#).

[Foundation Scotland's webpage on designing projects for people and planet](#) includes links to resources and case studies from across Scotland.

Other support organisations:

[NESCO – The North East's Community Climate Action Support Hub](#)

[Aberdeenshire Voluntary Action](#)

[ACVO – Aberdeen's Third Sector Interface](#)

[Funding Scotland](#)

[Local Energy Scotland](#)

[Business Energy Scotland](#)

## Appendix 1

### Funding Awards in Year 1

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

<b>Applicant Name</b>	<b>Amount Awarded</b>	<b>Grant Summary</b>
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.
	<b>£113,503</b>	<b>Total Awarded</b>

## Funding Awards in Year 2

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

<b>Applicant Name</b>	<b>Amount Awarded</b>	<b>Grant Summary</b>
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.
	<b>£124,276</b>	<b>Total Awarded</b>

### Funding Awards in Year 3

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

<b>Applicant Name</b>	<b>Amount Awarded</b>	<b>Grant Summary</b>
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.
	<b>£110,707</b>	Total Awarded

### Funding Awards in Year 4

In 2022, the Fund received 27 applications totalling £406k. 12 awards were made:

<b>Applicant Name</b>	<b>Amount Awarded</b>	<b>Grant Summary</b>
Aberchirder Village Hall	£15,000	To part fund insulation, air source heat pumps, PV and battery to improve the energy efficiency of the village hall.
Aberdeenshire Sailing Trust (SCIO)	£3,028	To fund an electric outboard motor and spare battery for the Trust's rescue boat at Loch of Skene, replacing a 6hp petrol outboard, to support the delivery of sailing activities and reduce carbon emissions.
Aberdeenshire Voluntary Action	£2,324	To fund the upgrade of lighting in the Magpie shop to improve energy efficiency and the customer experience.
Alford Valley Community Railway	£15,000	To part fund energy efficiency improvements, in particular double glazing, of the Alford Valley Community Railway station building, as part of the

		initiative to bring the railway back into use and establish the station building as a community facility.
Camphill Rudolf Steiner Schools Ltd	£12,500	To contribute to the cost of the installation of PV Panels including a battery storage system on a new residential home for young people with complex additional support needs.
Charlie House	£30,000 (over 2 years)	To part fund insulation and solar PV on a new specialist support centre for children with life-limiting and life-threatening conditions.
Inverurie Loco Works Football Club	£15,000	To part fund the replacement of floodlights with LED to improve energy efficiency and illumination levels on the football pitch, in order to reduce costs and help to increase usage during the winter periods.
Logie Coldstone Trust	£15,000	To part fund solar PV and batteries to reduce energy costs and increase resilience of the village hall.
Newton Dee Store	£15,000	To part fund the purchase of a Citroen e-Dispatch with a drawer storage system to undertake deliveries from the Newton Dee Store.
Seed Box Ltd	£13,606	To fund solar PV panels and battery storage at the relocated and expanded horticulture and outdoor therapy centre.
Bon Accord Heritage	£1,995	To fund a retrofit energy appraisal of Bon Accord Baths, to inform the development of an energy efficient refurbishment, and ultimately, to bring the baths back into public use.
Newtonhill Community Hall Association	£1,922	To fund thermostat controls, lighting sensors and upgrades to LED lighting in the Bettridge Centre, to reduce energy usage.
	<b>£140,375</b>	<b>Total awarded</b>