

**AN EVALUATION OF THE PILOT PHASE OF THE  
EDF RENEWABLES BURNHEAD MOSS EDUCATION  
AND TRAINING FUND  
2016 -2019**

*“..communities investing in the talent of  
their residents...”*

**For the Burnhead Moss Education & Training Fund Working  
Group and Foundation Scotland**

**April 2019**

*Pauline Radcliffe consultancy services*



# 1. EXECUTIVE SUMMARY

## 1.1 Introduction

The EDF-ER Burnhead Moss Education and Training Fund (the *E&T Fund*) is provided by EDF Renewables (EDF-R), the owners of Burnhead Moss wind farm, located near Falkirk, Scotland. The E&T is a community-led pilot grant scheme, funded through windfarm Community Benefit funding and administered by Foundation Scotland. In the last three years over £121,000 has been awarded in education and vocational training grants to nearly 100 individuals living in the communities served by the Community Benefit fund. The E&T Fund receives 20% of the total Community Benefit funding for Burnhead Moss, which is ringfenced. It has been supplemented by additional funding from each of the three communities' wider Community Benefit funds. The communities eligible to benefit from funding are defined using community council boundaries, usually within a 10-mile radius of the windfarm.

The table below summarises the number and value of awards made in the last 3 years and presents these in relation to the population of the three communities.

	total awards	Value of Awards	% total value	Population of each community	Individual communities as a % of total Area of benefit population	% population of each community reached by awards
<b>AVONBRIDGE &amp; STANDBURN</b>	66	<b>39,318</b>	<b>32</b>	1335	27	4.9
<b>LIMERIGG &amp; SLAMANNAN</b>	21	<b>26,824</b>	<b>22</b>	1612	33	1.3
<b>BLACKRIDGE</b>	40	<b>54,918</b>	<b>45</b>	1926	40	2.1
	<b>127</b>	<b>121,060</b>	<b>100</b>	<b>4873</b>	<b>100</b>	<b>2.6</b>

The E&T Fund, as a pilot community-led programme, represents a new and unique approach to involving communities impacted by windfarms in the design and delivery of a grant scheme which offers improved learning and life chances to residents.

*Pauline Radcliffe Consultancy* was commissioned by Foundation Scotland in January 2019 to undertake a review and evaluation of the E&T Fund over its first three pilot years. The aim of the review was to evaluate the Fund's success and its impact on individual beneficiaries, and where appropriate the wider communities of Avonbridge and Standburn, Limerigg and Slamannan (Falkirk area) and Blackridge (West Lothian).

## 1.2 Context

Critical to the E&T Fund is the active encouragement (through outreach) of those who previously did not consider further training or education an option, changing perceptions that educational opportunities are 'not for me' and increasing confidence. In other words, the ***Fund enables access to and unlocks opportunities for residents that they might not previously have perceived as accessible to them.***

The communities included within the Area of Benefit have all witnessed dramatic change to their local economy in recent decades. For much of the 19th and 20th centuries, the local economy was based on coal mining and heavy industry generally; this has all now disappeared. Socio-economic data<sup>1</sup> indicates that in the Community Benefit area, levels of working age benefit claimants and of child poverty are higher than the Scottish average and the level of home ownership is lower than average.

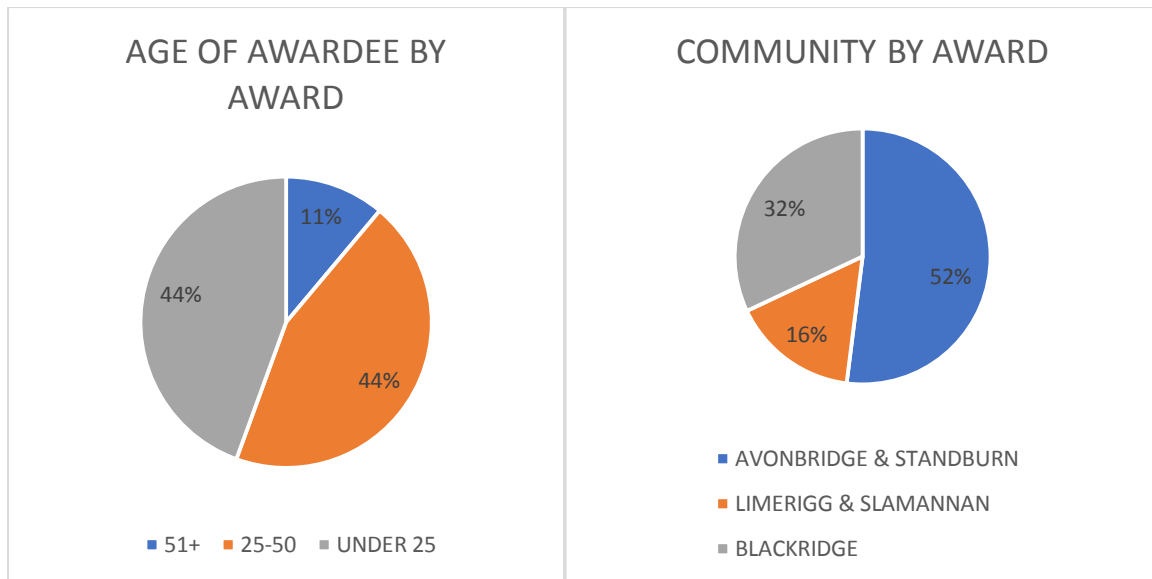
## 1.3 Main Fund outputs

FUND HEADLINES	
Total value of all awards granted	<b>£121,060</b>
Total number of all awards granted	<b>134</b>
Number of successful awards (completed or still in progress)	<b>127</b>
Number of enquiries dealt with by Outreach Worker	<b>109</b>
Number of individuals benefitting from awards	<b>97</b>
Number of individuals who have received two awards	<b>27</b>
Number of individuals who have received 3 or 4 awards	<b>4</b>
Lowest value of grant	<b>£60</b>
Highest value of grants to one awardee	<b>£3,300</b>

Eligibility for funding was based purely on residency in the Area of Benefit, regardless of the course of study or employment status of the applicant. The charts below show the breakdown of awards by age of awardee and community of residence.

---

<sup>1</sup> Drawn from Ward *Insight reports* on West Lothian and Falkirk Council websites



Most of the 69 awardees for whom data is available used the funding to support both travel and subsistence and study resources (including equipment for trades skills) (35 awardees used their funding in this way).

#### 1.4 Fund impacts

##### Onward vocational pathways for awardees

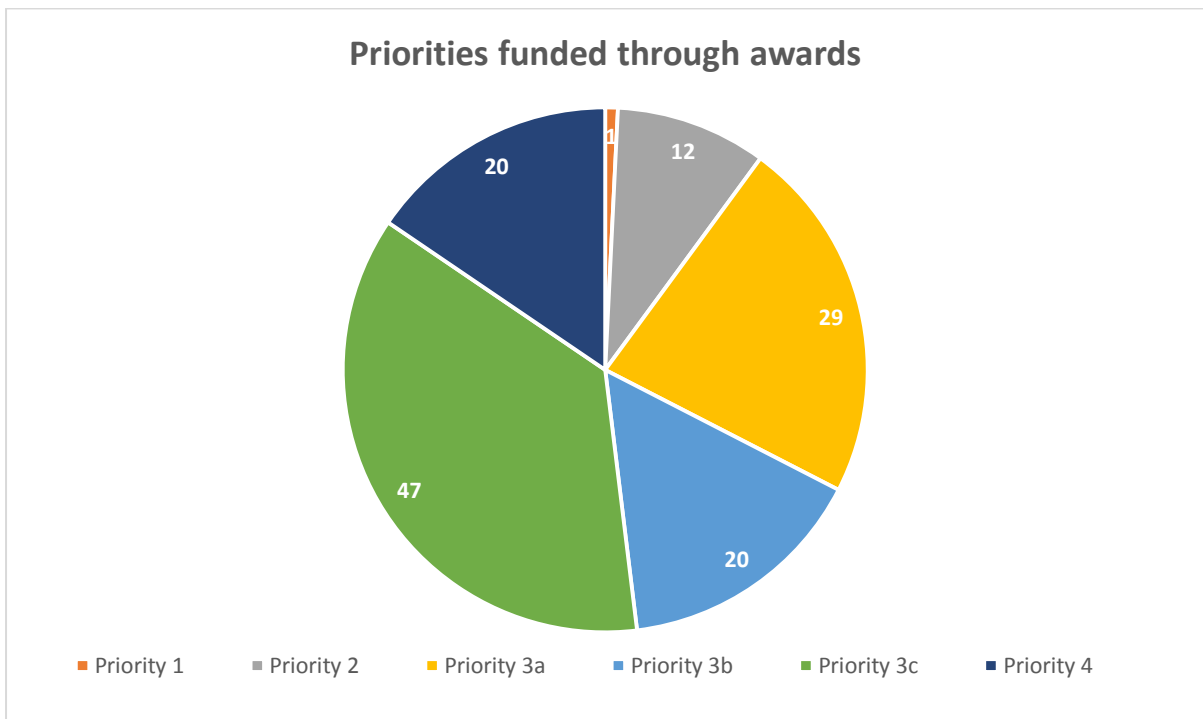
Of the 25 individuals interviewed during this evaluation, 9 (8 supported to do a short course and 1 a long course) stated that they would not have been able to begin their training or education course at this time without the funding. The most commonly cited progression pathway was improved career/ career development prospects. The table below illustrates this.

	Short course	Long course
<b>New/changed/improved employment</b>	2	
<b>Opportunities for further training or education</b>	2	7
<b>Career/career development prospects</b>	7	9
<b>Increased workplace/employment confidence</b>	3	6
<b>Own business</b>	1	

##### Training and education courses accessed as a result of funding.

The E&T Fund has four current priorities, with all eligible applications being funded regardless of where they sit within this priority list. The most common course type funded was courses which enhanced employability, many of which were short courses.

<b>Priority 1:</b>	Renewables & energy related
<b>Priority 2:</b>	Engineering, construction, health and safety, other STEM related
<b>Priority 3a:</b>	Industries benefitting local employment: forestry; plumbing, electrician, other trades, haulage, agriculture. Accountancy; hairdressing
<b>Priority 3b:</b>	Childcare, health and social care
<b>Priority 3c:</b>	Generic courses that enhance employability; e.g. elementary food hygiene, first aid etc.
<b>Priority 4:</b>	Other education courses



### Outreach Service

Word of mouth was found to be the most useful method of engaging residents in the opportunities the E&T Fund represents, with the outreach service an effective source of engagement and development support. Further focus on working with agencies that engage with the hardest to reach individuals (those not in education or employment) was recommended as the success of the Fund makes the prioritisation of applicants a future consideration of the community Working Group directing the Fund’s delivery.

## LOOKING FORWARD: KEY RECOMMENDATIONS

	RECOMMENDATION	PRIORITY & LEAD
<b>TARGETING OF OUTREACH EFFORT</b>	Prioritise efforts to engage Limerigg and Slamannan communities in order to ensure they are benefitting proportionately.	<b>WG</b>
	Decide how to prioritise Outreach Worker's time towards reaching priority groups such as NEET, including engaging with agencies working with these groups.	<b>WG</b>
	Continue to develop engagement with Colleges at senior level in order to establish consistent contacts. Use the impacts identified in this report to emphasise the importance of the E&T Fund to these areas.	<b>OW</b>
	Prioritise engagement with key agencies over a specified timeframe and review progress.	
	In partnership with Falkirk Council's Community Learning & Development and/or Employability teams, secure meetings with key contacts within local authorities (chapter 6).	<b>OW</b>
	Consider the resource implications of prioritising partner engagement as part of Outreach Worker role.	
Contact Falkirk Credit Union to establish a local relationship which could be of benefit to awardees in managing finances.	<b>OW</b>	
<b>REVIEWING FUND PRIORITIES AND ELIGIBILITY</b>	Take decision on E&T Fund to operate on a <i>'first come first served'</i> basis, until funds have been completely committed within each funding round.	<b>WG</b>
	Review the existing prioritisation of applicants and how this should be applied in future should funds be fully committed. Consider the views of stakeholder on alternative approaches to prioritisation.	
	Confirm whether any eligibility restrictions should be implemented in terms of the type of applicant or nature of education/training.	
	Consider formalising an additional fixed percentage amount of funding to be contributed from each of the 3 sub-areas of benefit over the next 3 years.	
	Consider setting maximum number and value of grants per individual awardee over a three- year period in order to reach as many individuals as possible, taking into account 3year course tapered funding commitments in principle.	<b>WG</b>

	Consider raising maximum grant size for equipment but requesting that evidence of total costs of item is provided following award of the grant.	
<b>GOVERNANCE AND REPORTING</b>	Agree and formalise the Working Group's Terms of Reference, publishing as a public document, available to all those that request it.	<b>WG</b>
	Decision should be taken on the all categories on which the Working Group and Foundation Scotland wishes to report and monitor on to improve future impact reporting (including longitudinal surveys).	
	The role of the Working Group member living out with the catchment area, should be clarified in terms of his co-option onto the WG in a volunteer adviser capacity.	<b>WG</b>
	Review current apportionment of time for outreach activity and assess where resource could either be diverted or further time (and payment from general funds) allocated.	
	Consider 'succession planning' and recruit one new member of the group from each community cluster in the next year to work alongside the existing membership.	<b>WG</b>
	Make amendments to application form based on feedback from enquirers	<b>OW</b>
	Encourage young people who have benefitted from the grant scheme to date to participate in the Working Group	
	Review award letter paperwork with support of Outreach Worker, creating separate templates (up to 3) according to the nature of the grant and to whom it will be paid.	<b>FS with OW</b>
	Propose a comprehensive data set that will be collected for all future applications, clarify what the Outreach Worker should be collecting to either integrate this into grant management systems or take a decision to make the role responsible for data collection.	<b>FS, OW and WG</b>
	Form a short-life working party to develop an agreed job description for the Outreach Worker role, reflecting the findings of this evaluation. Formally identify a member of the Working Group as a key point of contact for the post-holder.	<b>FS and WG</b>
Foundation Scotland to formalise the contract for this freelance service, reflecting HMRC guidance on self-employment for regular, ongoing service delivery.	<b>FS</b>	

Ensure that the Outreach Worker is written into Foundation Scotland's Scheme of Delegation for this funding stream.

Set up a local post office instant access savings (or other building society) account in the name of the Foundation Scotland, with Outreach Worker authorised to withdraw cash and deposits made only by Foundation Scotland.

**FS**

### Legend

**Working Group = WG**

**Outreach Worker: OW**

**Foundation Scotland: FS**

**Highest priority 1- 3 months**

**Medium priority 3-6 months**

**Non-urgent/ longer term: 6 -12 months**



## CONTENTS

3.	The Burnhead Moss Education and Training Fund .....	1
3.1	Introduction.....	1
3.2	Education and Training Fund objectives.....	1
3.3	EDF Renewables and the Education and Training Fund .....	2
3.4	Development of the Education and Training Fund model.....	3
4.	The Area of Benefit and Socio/ economic context .....	4
4.1	The local economy.....	4
4.2	Training provision in the area .....	6
5	Impact of the Fund .....	8
5.1	Overview .....	8
5.2	Distribution of awards across communities and by employment status .....	12
5.3	‘Thumbnail’ Findings from individual awardees interviewed.....	14
5.4	Summary of awardee’s experience (from telephone survey) .....	23
5.5	Recommendations.....	29
6.	Effectiveness of processes and project delivery .....	30
6.1	Overview: key strengths .....	30
6.2	The Working Group and Foundation Scotland.....	31
6.3	E&T Fund priorities and eligibility criteria .....	32
6.4	Application process.....	35
6.5	Award values and budget .....	38
6.6	Outreach Service .....	39
6.7	Monitoring project outputs, outcomes and the recording of data.....	43
6.8	Promotion of scheme .....	44
6.9	Training and support agency engagement .....	45
7.	Summary of recommendations .....	47
7.1	Outreach and promotion .....	47
7.2	Programme impact and priorities .....	48
7.3	Programme management and administration .....	48

## 3. The Burnhead Moss Education and Training Fund

### 3.1 Introduction

The EDF-ER Burnhead Moss Education and Training Fund (the *E&T Fund*) is provided by EDF Renewables (EDF-R), the owners of Burnhead Moss wind farm, located near Falkirk, Scotland. A community-led grant scheme, funded through windfarm Community Benefit funding and administered by Foundation Scotland, the E&T Fund has over the last three years made over £121,000 in education and vocational training grants to nearly 100 individuals living in the communities served by the Community Benefit fund.

The E&T Fund, as a pilot community-led programme, represents a new and unique approach to involving communities impacted by windfarms in the design and delivery of a grant scheme which offers improved learning and life chances to residents. In many ways it reflects the Scottish Government's aspirations for empowered communities across Scotland, which are enshrined in legislation<sup>2</sup> enabling communities (with a highlighted role for community councils) to both have more of a role in local decision making and to own and manage their community's assets.

*Pauline Radcliffe Consultancy* was commissioned by Foundation Scotland in January 2019 to undertake a review and evaluation of the E&T Fund over its first three pilot years. The aim of the review was to evaluate the Fund's success and impact on the individual beneficiaries, and where appropriate the wider communities of Avonbridge and Standburn, Limerigg and Slamannan (Falkirk area) and Blackridge (West Lothian).

### 3.2 Education and Training Fund objectives

**“Communities investing in the talent of their residents.”**

*Working Group member*

Given the way in which the E&T Fund evolved, through negotiation with the leadership of the community Working Group (WG) with Foundation Scotland (FS) and EDF-R it is fair to say that its objectives and purpose also evolved as the ambition and the aspirations of the community representatives involved were articulated and grew to fruition.

The aim of the Fund is now described by WG members as a means to:

**“encourage people to undertake (largely vocational) training and improve their life chances, especially for those who have not previously accessed training and further training and improve their life chances, especially for those who have not previously accessed training and further education.”**

*Output from Appreciative Inquiry session with Working Group (see Appendix 3)*

---

<sup>2</sup> Community Empowerment (Scotland) Act 2015

Critical to the E&T Fund is the active encouragement (through outreach) of those who previously did not consider further training or education an option for themselves, changing self-perception that educational opportunities are 'not for me' and increasing confidence. In other words, the ***Fund enables access to and unlocks opportunities for residents that they might not previously have perceived as accessible to them.***

There was a strong feeling that the Fund should be regarded as a driver for building community capacity and confidence (alongside the wider community-specific Community Benefit funds) through strengthening local communities (and services). Instilling a sense of positivity for communities experiencing challenges of isolation and low income and limited life choices is seen as an important goal in itself.

Some WG members also regard the E&T Fund as an opportunity to '*get money circulating within the community*' and to offer opportunities ultimately for new enterprises to open within the area.

### 3.3 EDF Renewables and the Education and Training Fund

The Scottish Government provides national guidance<sup>3</sup> for onshore renewable energy industry developers on the provision of Community Benefit funding, including the promotion of a national rate for onshore wind equivalent to at least £5,000 per MW per year, index linked for the operational lifetime of the development for Community Benefits packages. Most renewable energy providers have adhered to the principles, with a wide range of Community Benefit schemes in operation across Scotland. As larger sites have meant larger funds for communities, some companies have looked for new ways to invest funding in order to ensure that funding reaches a larger proportion and wider range of residents.

*"The Burnhead Moss Education and Training Fund represents a new way to utilise Community Benefit funds, hitting a much wider range of residents in the beneficiary communities."*

*Leanne Watson, Asset Manager Team, EDF Renewables*

The E&T Fund receives 20% of the total Community Benefit funding for Burnhead Moss, which is ringfenced and in fact has been supplemented by additional funding from each of the three communities' wider Community Benefit funds. The communities to benefit from funding are defined using community council boundaries, usually within a 10-mile radius of the windfarm.

The way in which the E&T Fund has been developed and designed by the communities, with the support of Foundation Scotland, represents a new approach for the administering of training funds provided by EDF-R and one which has since been used as a blueprint for three

---

<sup>3</sup> Scottish Government Good practice principles for Community Benefits from Onshore renewable Energy developments, Local Energy Scotland, 2016

other windfarms operated by the company. It has required considerable work on the part of both the Working Group members, who have devised the details of the scheme, and Foundation Scotland, which has been required to flex its existing grant administration processes to meet the needs of what has evolved as a truly community-led scheme.

*“I would like to say thank you for the support EDF Energy has given me and my family in building a future..... I now have a qualification to improve my chances of employment and it's given me greater self-confidence.”*

*Fund beneficiary*

### 3.4 Development of the Education and Training Fund model

EDF-R's initial intention for a separate fund was to encourage and support careers in the renewable industries, for example, through the funding of Modern Apprenticeships and STEM subjects. Whilst this route was explored, feedback from community representatives (appointed through community councils and locally representative groups to a Working Group) soon established that such a fund was perceived as being too narrow in its focus, and unlikely to benefit many of the communities' residents. Through negotiation between EDF-R, Foundation Scotland and the Working Group, a much broader approach was eventually devised and developed by Working Group members, under which any resident could apply for funding to support their access to education and training opportunities.

Whilst Renewable engineering and STEM subjects remain designated as the highest priorities for the Fund, in fact applications from individuals living in the defined area have been awarded funding regardless of the subject of study, resulting in access to a wide range of courses supported: from support with living costs for a medical student to funding for an embalming course with Antonine Funeral Training.

## 4. The Area of Benefit and Socio/ economic context

### 4.1 The local economy

The communities included within the Area of Benefit have all witnessed dramatic change to their local economy in recent decades. For much of the 19th and 20th centuries, the local economy was based on coal mining and heavy industry generally; this has all now disappeared. Socio-economic data<sup>4</sup> indicates that in the Community Benefit area, levels of working age benefit claimants and of child poverty are higher than the Scottish average and the level of home ownership is lower than average.

There are no major employers *within* the area, (although one or two haulage/ distribution businesses exist) with the *local* economy based mainly around agriculture, forestry and related services.

However, major industries do exist *within commuting distance* of all villages, including the petrochemical industry in Grangemouth, construction development and the distribution hubs of the central belt. The community planning exercises recently carried out for the Community Benefit area showed that most employed people living in the area travel to workplaces elsewhere in central Scotland.

With a concentration of the population in the Area of Benefit resident in the main villages/settlements, there is nevertheless a substantial percentage of residents in relatively remote, rural locations (40% of Avonbridge and Standburn's population<sup>5</sup>). **Lack of access to transport** (private car ownership and limited public transport) is a key barrier to accessing education and employment within the area.

*“There is only 1 bus per hour from her to college and if you miss it or it doesn't turn up, you're snookered.”*

*Fund beneficiary*

#### School leaver destinations

Up to 8% of school leavers from the high schools serving the communities are unemployed and seeking work (the national average is 6%) and the most popular destination to progress to is further education.

---

<sup>4</sup> Drawn from Ward *Insight reports* on West Lothian and Falkirk Council websites

<sup>5</sup> Avonbridge and Standburn Community Plan, 2016

Percentage	FE	HE	Emp	Training	Voluntary work	Activity Agreement	UB40 seeking	UB40 not seeking
<b>Falkirk</b>	35	20	31	3	1	2	6	2
<b>West Lothian</b>	39	27	22	2	1	1	5	1

*Training, employment and unemployment destination of school leavers 2016/17 Scottish Government. Note that this is ALL schools within the local authority areas <sup>6</sup>*

### Growth employment sectors

Regional Skills Assessments for Forth Valley and West Lothian<sup>7</sup> indicate a number of predominant sectors of the economy, and target sectors for growth.

Over a quarter of Forth Valley employers reported that not all of their staff are fully proficient in their work roles, with 24% of employers reporting a skills gap, above the average for Scotland of 19% - with skills gaps most cited in care, leisure, sales and customer service occupations<sup>8</sup>.

The specialised economy in Grangemouth has an impact on the Forth Valley region, reflected in the high concentration of production, transport and storage. The expected decline in manufacturing could have severe implications in and around Grangemouth. As a result of this, there is a drive to diversify Grangemouth manufacturing to higher quality petrochemical products and renewable industries<sup>9</sup>. A 17% rise in health and social work employment could result in a need for further skills in this field in the region. In both West Lothian and Falkirk area manufacturing is set to decline significantly as a source of employment.

E&T Fund awards to date show a clear trend in vocational training for skills needed in the health and social care, construction and distribution sectors.

<sup>6</sup> School Leaver Destinations, Scottish Government, 2018.

<sup>7</sup> *West Lothian Regional Skills Assessment*, Skills Development Scotland, 2018.

<sup>8</sup> *Forth Valley Regional Skills Assessment*, Skills Development Scotland, 2016. Note that the Forth Valley region covers several local authority areas.

<sup>9</sup> *An Economic Strategy for Falkirk 2015-2025*, Falkirk Council

	Predominant employment sectors	Growth Sectors	Declining sectors
<b>Falkirk and Forth Valley</b>	Petrochemicals Production Transport Storage Health and social care	IT Health and social care Real estate Electricity and gas Finance & insurance Construction & engineering	Sales and customer service Agriculture (-15%) Other manufacturing (-12%)
<b>West Lothian</b>	Distribution Wholesale & Retail	Construction & engineering Administrative & support services IT and communication Health & social care	Manufacturing Public admin & defence

Many of these sectors are highlighted in the existing priorities of the E&T Fund, as is seen in Chapter 6 of this report which analyses the awards by each of the priorities agreed by the Working Group.

#### 4.2 Training provision in the area

The area is served by two Further Education (FE) Colleges, West Lothian and Forth Valley, as well as several not-for-profit and commercial training providers. Non-public sector training providers used by the awardees of the E&T Fund for practical vocational training include:

- Forth Valley Community Focus CIC
- GNE Consultancy
- Safe Hands
- MacSafe
- Alba Care
- Scania Training Services
- G&E Licensing
- Sibbald Training

Those accessing the E&T Fund have also funded training and further/higher education in other parts of Scotland and in the UK. However, applications are predominantly for local training provision.

#### Public sector training provision and national strategic context

The Colleges are a key partner in delivering the Scottish Government's *Developing the Young Workforce Strategy* (age 3-18) through *Foundation Apprenticeships*, which enable school-aged students to access employment experience and College courses whilst still in high school (there are 5 High Schools serving the Burnhead Moss Community Benefit area).

As well as preparing young people for employment, Colleges work alongside both schools and employers to fill skills gaps and anticipate labour demand in key sectors.

The Scottish Government's *Labour Market Strategy* and *Learning Journey Review for those aged 15-24* focuses on the following:

- *An apprenticeship which continues to evolve and innovate in line with industry needs.*
- *A qualifications framework, in the Scottish Credit & Qualifications Framework, which can support a flexible learner journey.*
- *A national careers service delivered locally, underpinned by a well-established online information service.*
- *A wide range of advice, support and resources available across educational sectors to **support and assist young people, parents/carers to make informed choices.***

Extract from 15-24 Learner Journey Review 2017<sup>10</sup>

Training providers and skills/employability agencies in the Community Benefit area, deliver a number of programmes and projects to support the 'employability pipeline':

- Both Colleges are major providers of MA training in partnership with employers; Forth Valley College is a major provider of MAs in engineering, electrical safety and oil, gas and petrochemical industry skills.
- Skills Development Scotland has advisers based in all secondary schools to support onward learning journeys (national careers service).
- Activity Agreements: supporting 16-19 years who have left school to re-engage with learning. (local authority delivered).
- Central Scotland Regional Equality Council (capacity building function in Forth Valley)
- Jobcentre Plus.

Working with employers, Colleges also deliver the *Flexible Workforce Development Fund*, which supports existing employers to upskill their workforce. In the Forth Valley area, the College has reported that the Fund has seen an unexpected demand for improving basic digital skills of employees, as well as professional development in managerial and team working competencies.

The complex map of skills and training advice and provision unsurprisingly has taken this community-led grant scheme time and patience to navigate, with the Outreach Worker acting in an information and signposting role for many of these agencies and providers and applicants. Chapter 6, section C will explore this in further detail and discuss where links could, with adequate resources, be strengthened.

---

<sup>10</sup> *The Learner Journey Review*, Scottish Government, 2017.



## 5 Impact of the Fund

### 5.1 Overview

This section analyses available data, gained through detailed analysis of monitoring information recorded and telephone interviews with beneficiaries, in order to assess the impact of the Fund on grant awardees to date. Where possible from the data available, it will identify trends where they exist in the type of learner, course and impacts of the E&T Fund. A full summary of all telephone interviews is provided, with case studies interspersed throughout the chapter. Case studies are provided where beneficiaries have agreed to their details being shared.

Since 2016, the fund has disbursed or allocated £121,060<sup>11</sup> through 127 awards ranging in value from £60 to £3,300. The value of awards allocated per community is as follows<sup>12</sup>:

	total awards	Value of Awards	% total value	Population of each community	Individual communities as a % of total Area of benefit population	% population of each community reached by awards
<b>AVONBRIDGE &amp; STANDBURN</b>	66	<b>39,318</b>	<b>32</b>	1335	27	4.9
<b>LIMERIGG &amp; SLAMANNAN</b>	21	<b>26,824</b>	<b>22</b>	1612	33	1.3
<b>BLACKRIDGE</b>	40	<b>54,918</b>	<b>45</b>	1926	40	2.1
	<b>127</b>	<b>121,060</b>	<b>100</b>	<b>4873</b>	<b>100</b>	<b>2.6</b>

Please note that these figures exclude five deferred awards.

Ninety-seven individuals have been allocated or received awards.

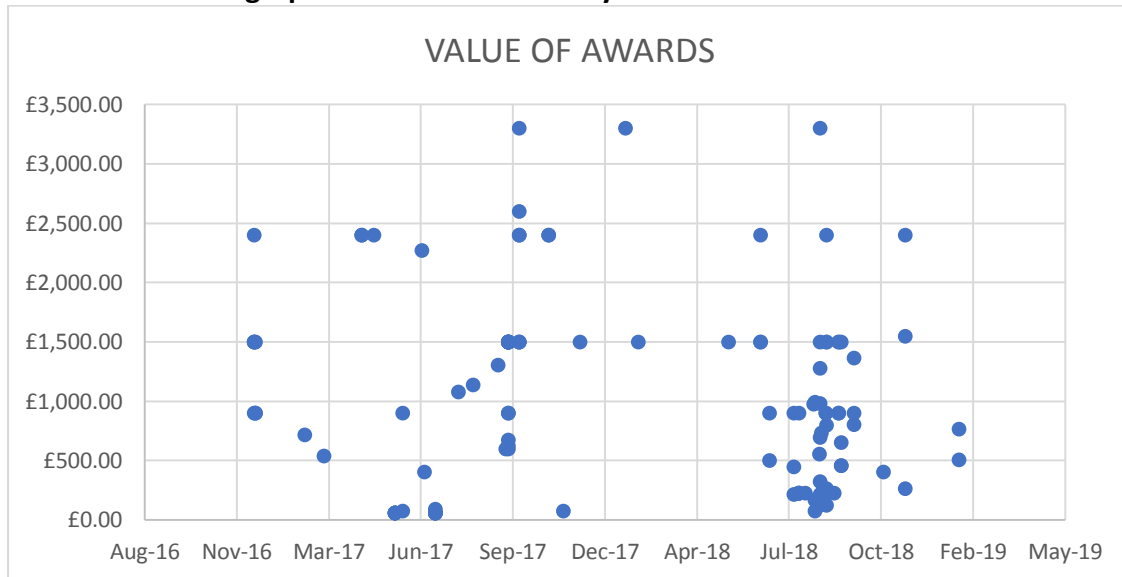
Twenty-one awardees received 2 awards, 3 received three awards and one received 4 awards. The individual recipients of more than one award were all female and in total 70

<sup>11</sup> Foundation's Scotland accounting systems report the total awards expended from the allocated E&T Fund itself as being *only* £94,030. This is due to early awards being funded by the Area of Benefit's individual general community funds, rather than the ringfenced pilot. The awards were allocated from the area funds rather than the central Education & Training pot. £25,000 in education grants were allocated from the Blackridge general fund and another £2,500 from the Avonbridge and Standburn fund.

<sup>12</sup> *Census data not necessarily precisely co-terminous with community council boundaries*  
Avonbridge (1189) and Standburn (146) = 1335 (from Avonbridge and Standburn Community Plan 2017)  
Limerigg (116) and Slamannan (1,383) = 1,499 (from Limerigg Community Plan and Census settlement statistics)  
Blackridge: 1,926 (2011 Ward Census data).

women and 27 men have received or been allocated awards, with 100 awards being allocated to women and 27 to men. The charts below show awardee ages and community of residence for all allocated awards.

**Chart 5.1: Scatter graph of value of awards by value and date**



Nb – this chart excludes 5 deferred awards

**Chart 5.2 and 5.3 distribution of awards by age and community**

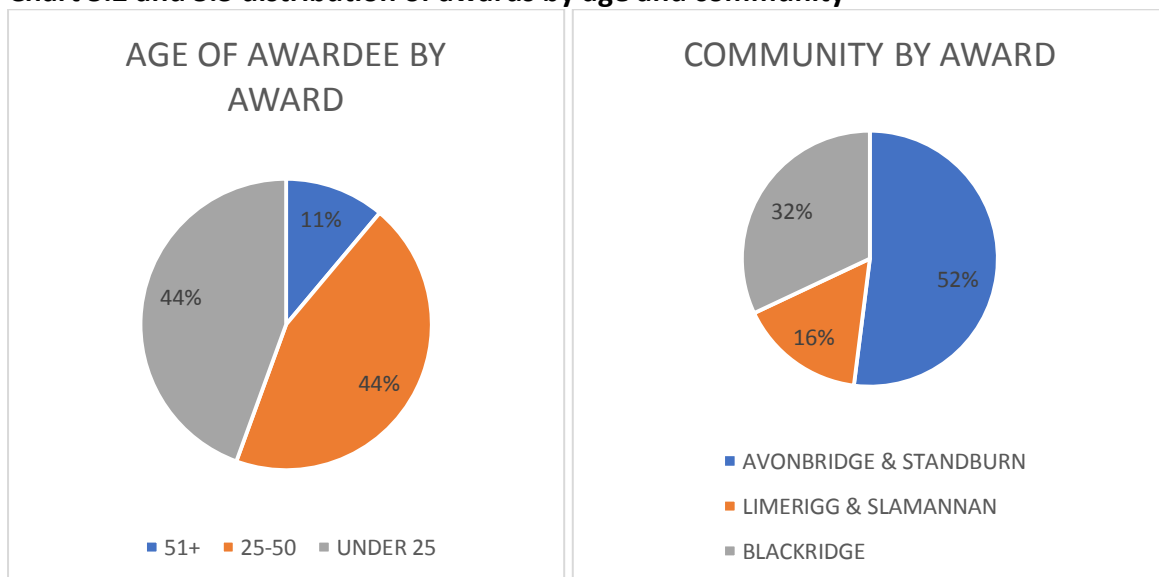
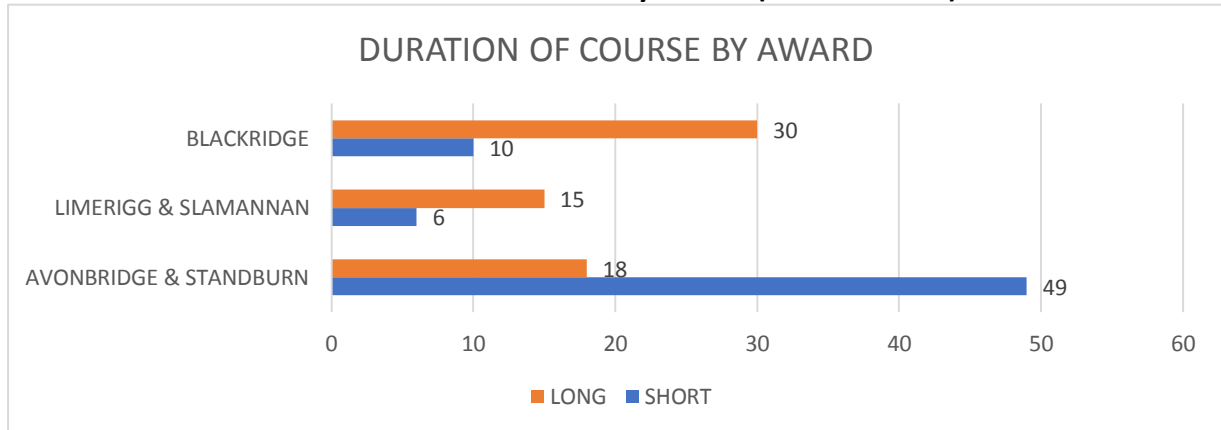


Chart 5.4 below also shows the distribution of allocated awards by length of course<sup>13</sup> across the 3 eligible communities and reflects which type of courses were in greatest demand in each of the communities. In Avonbridge and Standburn, there is a predominance of awards to support people doing short courses (such as food hygiene and first aid training), which contributed towards their employability, whereas in the other two communities more people doing longer courses than short courses have received awards.

**Chart 5.4: Duration of course in each community cluster (where known)**



<sup>13</sup> **Short courses** are defined as being completed within a matter of hours, days, weeks which may lead to certification certification but not HNC/HND or degree level courses.  
**Long courses** are generally for a minimum of one academic year and lead to HNC/HND/ undergraduate or postgraduate degrees. They could include Modern Apprenticeships.

## Calum

### Profile

Aged 19, Calum is from Avonbridge. In September 2018 Calum received an award of £1,500 from the **Education and Training Fund**, in time for him to start his HNC course in Green Technology at the Ayr campus of Scotland's Rural College. The HNC gives him a strong grounding in renewable engineering, with particular focus on its use within agriculture, on which to build further study. He is currently completing his third term of the course and hopes to progress to HND level next academic year.

### Applying for the award

Calum heard about the Fund from a neighbour who had successfully been through process of obtaining a grant. Having met the Outreach Worker at one of the Avonbridge Community Café drop-in sessions, he was given useful pointers on completing the form which he then submitted himself. The scheme was the ideal source of funding for his chosen course, given the priority subject areas that EDF Renewables wanted to encourage with the funding. He is hopeful that this link and achievement in this subject, may assist him in finding a career in the windfarm sector in future.

### How the award is being spent

Calum already received SAAS funding for the course, but the E&T scheme funding reduced the financial pressures on him, enabling Calum to purchase essentials for course work and generally be better prepared for study. It has also given him the opportunity to pay for additional excursions which are optional on the course, such as visiting power plants, which otherwise would have been too costly. During term time, he hasn't needed to find a job alongside his study, enabling him to focus on his studies.

### The impact this has had

The grant has taken the financial pressure off Calum whilst studying at College, meaning he doesn't need to work during term time. The course itself has had a huge impact on his understanding of how energy is consumed in the home and how to be more energy efficient. Taking the course has confirmed Calum's aspiration to progress to study at degree level and work in renewables industry which he regards as the future, especially in Scotland. Either working in renewable engineering or becoming an energy adviser for business are both career options he is considering.

*The funding has given me opportunities to take part in practical experiences which are 'extras' requiring a fee, like going to visit power plants.*

*Electricity bills used to be just a load of numbers to me. Now I understand the bills and how what I am using influences the bill. I've actually just come off the phone with my mum having a conversation about how she could reduce the household bill.*

## 5.2 Distribution of awards across communities and by employment status

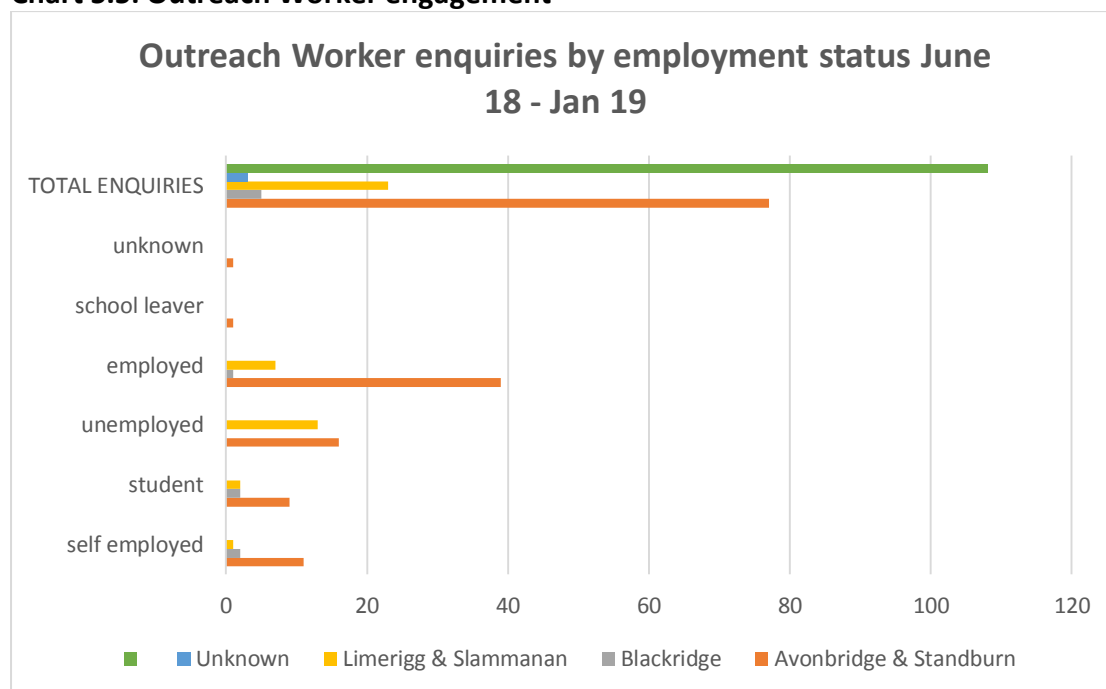
### Which communities benefitted the most?

Whilst Avonbridge & Standburn and Blackridge communities all benefitted proportionately in terms of their population size, Slamannan and Limerigg were slightly under-represented in the number and value of awards, with their population representing 33% of the total Area of Benefit area, but only receiving 22% of total value of grants. This may in part be due to the absence of a functioning Community Council in this area to assist with fund promotion and awareness raising and difficulties in establishing a regular 'drop-in' venue for the Outreach Worker at Limerigg. *Chart 5.5* also shows the relative numbers of enquiries from each community dealt with by the Outreach Worker with 77 of the total 108 enquiries coming from Avonbridge and Standburn. This is due to pilot activity for the outreach service being contained initially in Avonbridge and Standburn only, with outreach activity only being rolled out across the entire Area of Benefit for 3 months at the time of reporting.

### Employment status of awardees

The Outreach Worker recorded the employment status of all enquiries she dealt with in the period of July 2018 to end January 2019. Most enquiries came from people already in employment (including part-time) wishing to progress their careers. Twenty-nine enquiries were from individuals who were currently unemployed.

**Chart 5.5: Outreach Worker engagement**

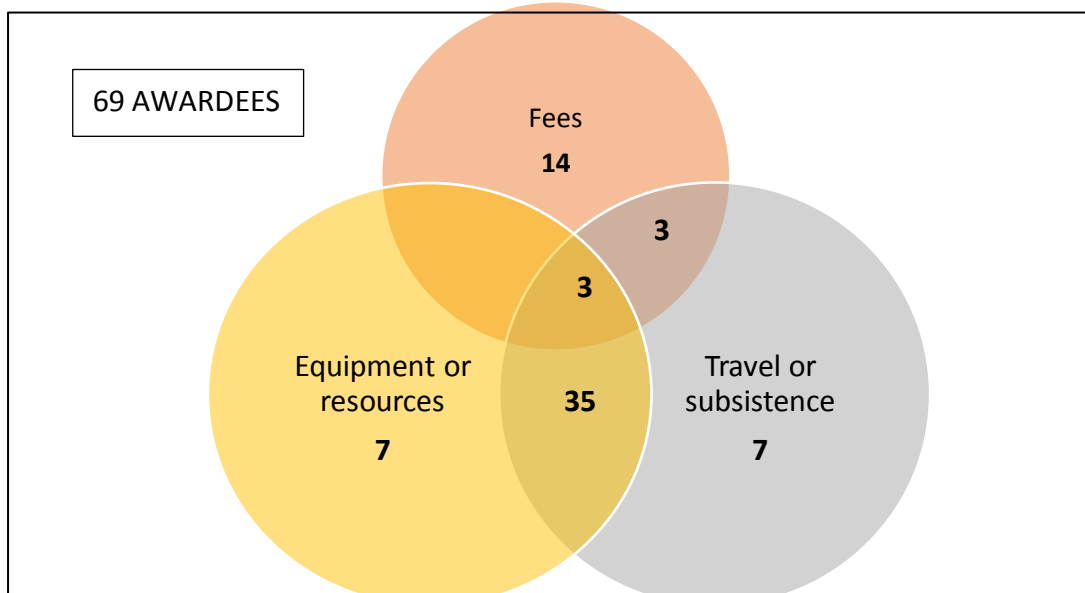


### Use of award

The diagram below shows (where information is available) how awardees used their award. Most commonly, awards supported learners with travel or with the purchase of equipment,

resources for their study or training. In half of the cases where information is available (35 out of 69) the award was used to support both travel/subsistence and equipment or resources. Three beneficiaries used their award towards both fees and travel/subsistence and for a further three the award contributed to all three areas.

**Chart 5.6 Use of awards**



### 5.3 ‘Thumbnail’ Findings from individual awardees interviewed

The ‘thumbnail’ sketches provided in the following table demonstrate the impacts that the Fund has for individual awardees and provide some useful insights into how it operates.

Profile Sex, Age Provider (duration) Amount	How heard about Fund	Help with applicatio n	Reason for application	Impact of funding	What has changed?	Future impacts?
<b>Female, under 25 College (long) over £2,000</b>	Word of mouth	None	Costs associated with College	Already doing the course – but it would have been a struggle to continue getting through each year	<i>I really wasn't looking to further my training as most of the schools are in London and that just wasn't going to be happening because it's so expensive, but I have found a place in Leicester [to do honours course] and I can apply for funding to go and towards the cost of moving. The [EDF] funding has meant that I have been able to apply for this and take my training further</i>	The honours course (which she wouldn't have thought of applying for without the funding that made her HND more affordable), will definitely give her wider and better career options and pathways.

Profile Sex, Age Provider (duration) Amount	How heard about Fund	Help with applicatio n	Reason for application	Impact of funding	What has changed?	Future impacts?
<b>Male, 25+ Training co (short) Up to £1,000</b>	Letterbox flier	None	Improve employment opportunities	Would not have done without funding. Unemployed at time and didn't have the money to self-fund.	<i>It helped to bolster my CV and I use the safety side of it on a daily basis.</i> Now employed by NHS and using safety side of qualification on a daily basis - it was an addition to qualifications and is a ' <i>far superior</i> ' qualification to what he had already. <i>It has given me increased confidence in the workplace and contributed to my personal development - I have a wider scope of knowledge.</i> He now sits on 2 national boards and says this qualification has given him insight to have an input in advance	It will allow him to take further career opportunities as they arise - he is now doing all the health and safety risk assessments for all 11 buildings in Scotland. Volumes of knowledge gained.
<b>Female, under 25 College (short) up to £1000</b>	Poster	None	Costs associated with College	Would still have done course but would have had to hire equipment or use the College equipment - having your own makes it much easier.	Better in her job - wider skill set that lots of people don't have. And she still has the equipment. <i>Buying your own equipment sticks with you for a long time, especially your first nice set.</i> Improved confidence - because she was in a class with a broad variety of younger and older people and you had to be really out there to get your voice heard.	<i>It widens my job prospects. Lots of jobs now ask for this qualification and lots of people in the industry would have to go back and do it.</i>



Profile Sex, Age Provider (duration) Amount	How heard about Fund	Help with applicatio n	Reason for application	Impact of funding	What has changed?	Future impacts?
Male, under 25 Training co (short) £1,000 - £2,000	Not sure	Family member/ carer	Improve employment opportunities	Would still have done course but would have had to borrow from parents and pay back.	It let him sign up with an agency and they did offer him some work. He is now working elsewhere, but he knows he can go back to the agency if he needs to, and it means there is a further qualification he can go on to get. <i>If anything happens or I end up not liking the job, I have a fall back. I could use it to do something else.</i>	Not able to comment.
Female, 25+ College (long) £2,000+	Word of mouth	None	Costs associated with College	Already doing the course, but funding has been a big help.	Job prospects when complete	Career prospects
Female, under 25 College (long) £1,000 - £2,000	Word of mouth	Family member/ carer	Costs associated with College	Already applied and got a place, but really needed the equipment.	Being able to finish assessments at home - the laptop has really helped with that.	Career prospects
Female, under 25 College (long) £1,000 - £2,000	Word of mouth	Family member/ carer	Costs associated with College	Already applied, but this <i>made it easier to make the decision to accept.</i>	<i>Just confidence that I've got the money there and I don't have to worry so much.</i>	Hoping to do an HND next year, then to Uni and then a job
Male, under 25 College (long) £2,000+	email from College	Call to phone number on form	Costs associated with College	Would still have done the course, but funding helped a lot with bus fares (£105 a month) and a laptop so can use the time on the bus to work too. Third round of funding put towards a car.	Confidence and motivation - he wasn't very motivated at school.	He has been accepted to 3rd year university course and wants to go on to do a Masters and then a career in this discipline.

Profile Sex, Age Provider (duration) Amount	How heard about Fund	Help with applicatio n	Reason for application	Impact of funding	What has changed?	Future impacts?
<b>Male, 25+ Training co (short) up to £1000</b>	Word of mouth	None	Improve employment opportunities	Would perhaps have still done the course, but would have been years down the line to save that kind of money.	Anticipates that he will have opportunities for better jobs and more money.	<i>Once I've got it, it opens up a number of different employment I can apply for...where I live in the central belt, there are large companies on the doorstep and they are always looking but you need your qualification to apply. This will give me opportunities for better work and better income.</i>
<b>Female, under 25 College (short) £1,000 - £2,000</b>	Word of mouth	Outreach worker	Improve employment opportunities	Would not have done without funding - unemployed for a year and wouldn't have been able to afford it.	<i>Everything's changed. I have my own Facebook page.... It started with a hobby, but hopefully I can get myself a wee business out of it. It has bumped up my confidence a lot.... before I would get very nervous, but now I jump right in and don't get nervous at all. I can see myself having a career rather than just a hobby.</i>	She sees this as an opportunity to develop her own business

Profile Sex, Age Provider (duration) Amount	How heard about Fund	Help with applicatio n	Reason for application	Impact of funding	What has changed?	Future impacts?
Female, under 25 College (long) £2,000+	email from College	None	Costs associated with College	Had already started College, but this <i>helped massively when I was getting equipment and paying for uniforms and travelling to get to College.</i> Only getting £60 every 2 weeks and had missed the cut off date for a full bursary, so this was a huge help.	Much more confident and has a new career that she thinks she can get further in with the qualification than if she hadn't done it.	Better progression in career.
Male 25+ Training co (short) up to £1000	Word of mouth	None	Improve employment opportunities	Would not have done without funding as has a family, mortgage, etc and prioritises them. Wouldn't have this kind of money kicking about or be able to justify spending it this way.	<i>...for myself it increases my recognition as a qualified professional, rather than just experienced. It shows I have had the effort and will myself as an individual to progress to a more senior level. And even more importantly for me, it allows me to get institute membership, which opens up a whole professional network...and it's expanded my knowledge too.</i>	<i>Once I've completed the course, I will have a recognised qualification at BTEC level 7, which is equivalent to a foundation level degree and would let me, if I wish go into the 3rd year of a bachelors degree</i>
Male, under 25 College (short) up to £1000	Word of mouth	Family member/ carer	Improve employment opportunities	Would maybe have done the course at some future point, but this meant it was possible now.	Still at College and maintaining placement.	Hoping it will mean he can get a job.
Male, 25+ College (short) up to £1000	Word of mouth	Outreach worker	Improve employment opportunities	Would not have done without funding - wouldn't have been able to afford as unemployed	Nothing as failed the course. Now thinking about doing a first aid course that Outreach worker has mentioned to him.	None

Profile Sex, Age Provider (duration) Amount	How heard about Fund	Help with applicatio n	Reason for application	Impact of funding	What has changed?	Future impacts?
Female, under 25 College (long) up to £1000	Word of mouth	None	Costs associated with College	Already doing the course, but this made it more affordable.	Now has a job. Achieved a goal that she had (to get the qualification) and boosted confidence. <i>I am now a fully qualified practitioner.</i>	Now can apply for any job with the qualification and can do further education to get a degree.
Female, 25+ College (long x2) £2,000+	email (can't remember who from)	None	Costs associated with College	Would have done the course, but maybe not finished <i>I don't know if I would've stuck to it. I might have got into financial difficulties and this definitely helped out. I got a computer that I can use to study like this week when we're off. I might have fallen behind in class last year without that and I couldn't do this year without a computer.</i>	Opportunities to do work placements in a school and in the Council - she wouldn't have had that chance to get a foot in the door in these places if she wasn't doing the course.	Because she has a school age child, she would like to work in a school office or as a school helper and then later, maybe get work in a business, the NHS or something like that.

Profile Sex, Age Provider (duration) Amount	How heard about Fund	Help with applicatio n	Reason for application	Impact of funding	What has changed?	Future impacts?
Male, under 25 College (long) £1,000 - £2,000	Word of mouth	Outreach worker	Improve employment opportunities	Funding made it easier to do course, purchase essentials for course work, and allowed him to be better prepared for course work. <i>It's given me opportunities to take part in practical experiences which are 'extras' requiring a fee.</i> Has taken financial pressure off so doesn't need to work during term-time.	1. His understanding of how energy is consumed in the home - electricity bills used to be just a load of numbers. <i>Now I understand the bills and how what I am using influences the bill. I've actually just come off the phone with my mum having a conversation about how she could reduce the household bill.</i> 2. He's been able to work with agricultural machinery that he would have never had access to.	He hopes to go on to study to degree level and work in the industry. Or he would enjoy working as adviser for businesses.
Female, under 25 College (long) £1,000 - £2,000	Word of mouth	None	Costs associated with College	Would have done the course, but would have had to work more and that would've meant less time to focus on studies and wouldn't have done as well. <i>I've been able to buy a lot of text books to help increase my knowledge and I will have those books the rest of my life.</i>	Nothing yet, but when she has the HNC she wants to work in her dream job - which she needs this qualification to get it (it's required)	Still will have the books to use and she will be able to apply for the job she has always wanted to do.
Female, 25+ College (long) £2,000+	Outreach worker	Outreach worker	Improve employment opportunities	Would not have done without funding - Couldn't have afforded and only applied for the course because she knew the funding was available.	Only just started the course	Hoping for a better job - not decided yet whether in finance or HR - but as part of the course she gets help in College to look into what sorts of jobs are available.

Profile Sex, Age Provider (duration) Amount	How heard about Fund	Help with applicatio n	Reason for application	Impact of funding	What has changed?	Future impacts?
<b>Male, under 25 College (long) £1,000 - £2,000</b>	Word of mouth	Family member/ carer	Costs associated with College	Would probably have done anyway, but this made it much easier - some of the money went to getting a weekly bus pass to get to College and the rest towards a pc. <i>I wouldn't have been able to work at home, so I would have had to do all my work in College on their computer and had to work much harder in College.</i>	He has learned a lot about his subject and has skills that he could use in his own life or to earn some money.	He would like to go on to do a specialist course which is starting up soon. Also, he now has the skills to maybe make a bit of money helping family and friends out if they have problems.
<b>Male, under 25 College (short) up to £1000</b>	Word of mouth	Outreach worker	Improve employment opportunities	The course would have been necessary eventually, but he would have struggled to afford to pay for it himself as only earning apprentice wage.	Confidence in himself <i>I'm now able to go on agency work and get onto sites, so its opened up a much bigger spectrum for me to get onto sites and with the first aid as well, that helps a lot towards it.</i>	He's hoping to change career, prompted by doing a funded course.
<b>Female, under 25 College (long) £1,000 - £2,000</b>	Word of mouth	Family member/ carer	Costs associated with College	Would probably have done the course without the funding, but it would have been much harder - there are a lot of books and equipment needed and she wouldn't have been able to go on the trips (which cost extra).	Being able to go on trips and have equipment means fuller participation in the learning.	She wants to stay on at College and do the HND.
<b>Female, under 25 College (long) £2,000+</b>	Outreach worker	None	Costs associated with College	Would have done the course without the funding but made it much more affordable and took a lot of worry away.	Still studying, so nothing has changed yet.	Hard to say at the moment.

Profile Sex, Age Provider (duration) Amount	How heard about Fund	Help with applicatio n	Reason for application	Impact of funding	What has changed?	Future impacts?
<b>Male, under 25 College (long) £2,000+</b>	Word of mouth	Family member/ carer	Costs associated with College	Would have done the course without the funding, but this has helped him get through things much faster and more independently because he doesn't have to rely on other people's equipment and time (e.g. having to go to jobs with another tradesman).	<i>It builds your confidence when you can go and do stuff yourself.</i>	He will keep working and see where it goes - maybe work for himself one day, who knows?
<b>Male, 25+ Training co (short) up to £1000</b>	Can't remember	None	Improve employment opportunities	Would not have done without funding - wouldn't have been able to afford	He has just got a job - not as a result of this qualification (though he thinks getting it had impacts on his confidence and positivity, which might have come across). But once he is in the door, he can now look for opportunities that use his qualification. And now he has work, he can save to do some more courses and improve his employability and opportunities for progression. <i>Even just getting up in the morning and going to do the course for 4 days and networking again made me feel good about myself, so it's the psychological things too.</i>	He can tell his new employer that he has qualifications and strengths in this area and can look for opportunities in a relevant role. And now he has work he will be able to save and do more training. <i>I will use this as a springboard and capitalise on the skills and will now be able to afford to do one or two additional things as well and put together a cv with relevant things to get a job. With the money I will start earning I will look to further improve my lot.</i>

## 5.4 Summary of awardee's experience (from telephone survey)

### Application reasons and process:

- Individuals generally heard about the Fund through word of mouth, though one or two had seen posters or noticed a letterbox flier or community newspaper advert. *Word of mouth* was often from another community or family member who had received funding. One or two had received an email about the Fund from their College on beginning a long course.
- Very few of those interviewed had needed or used any support to complete their application. Some younger people had input from a family member and a few had made use of the support offered by the outreach worker, but in general applicants said they found the application process to be straightforward. It is important to note that the Outreach Worker's own records of contact show that a considerable number of successful awardees did access support at some point during the application process (see *separate section on Outreach Worker*).
- Those studying longer courses tended to cite the associated costs (most often travel or equipment) as the main reason for applying, whilst those completing shorter courses cited reasons related to improving their employability or options for career progression.



## Alex

### Profile

Alex is 23 and lives in Blackridge. She received 2 awards through the Fund: one in September 2017 (£1,500) and one in September 2018 (£900). She will complete her HND Dance Artist at Glasgow Clyde College in June 2019. As well as training and learning at College, Alex is part of a dance school and competition team outside and is expected to take extra classes every week.

### Applying for the award

Alex has always loved dancing and dreamt of a dancing career. She found out about the Education and Training Fund through a local woman who runs an after-school dance club, whilst she was helping her dance teacher to run a class. She looked on the website <https://www.foundationscotland.org.uk/programmes/edf-burnhead-moss-education-and-training-fund/> to find out more and apply.

### How the award was spent

Before receiving the award, Alex was finding it a struggle to get through each year of her 4-year course. She used the award she received to help with the cost of daily travel to College in Glasgow (£40 a week for petrol), stationery and printing costs, scrapbooks and some of the special equipment and clothing that were necessary for her studies, such as uniforms, leotards, dance, pointe and character shoes. It has also contributed to the cost of costumes, compulsory theatre trips, food and drink.

### The impact this has had

The funding made Alex's HND more affordable and as a result, she is now applying to do an Honours degree course and hoping to apply for funding to help her with the move: she will have to go to Leicester to study. This will give her wider career options and pathways to performing with good directors – and she would not have thought of furthering her studies this way without the support that she has had from the Fund.

*I really wasn't looking to further my training as most of the schools are in London and that just wasn't going to be happening because it's so expensive, but I have found a place in Leicester and I can apply for funding to go and towards the cost of moving. The funding has meant that I have been able to apply for this and take my training further.*

*I was motivated to do the course by my love of dancing and dream of creating a dance career. Without the grant support I would not have been able to do the course with the correct uniform, shoes, or travel expenses...the bursary has allowed me to continue my studies...I would not be able to further my studies and plan for the future without this support.*

## Barriers overcome through funding

Of the 25 individuals interviewed during this evaluation, 9 (8 supported to do a short course and 1 a long course) stated that they would not have been able to begin their training or education course at this time without the funding. The remaining 16 -14 of whom were supported to do a long course - were either already doing the supported course or would have done it in any case.

	Short course	Long course
Already doing/would still have done course without funding	2	14
Only able to do course at this time because of funding	8	1

*“This is the first course anyone’s paid for – I’ve always had to save and wait. I am so grateful.”*

*Fund beneficiary*

Those doing longer courses tended to say that they had already begun their course or secured a place before applying and that the funding helped alleviate money worries or supported their ability to engage fully with the course, rather than being instrumental in their decision to study at all.

- Some believed they might not have been able to complete their studies without the funding
- Some were able to make better use of opportunities to engage with their studies through purchase of necessary equipment (such as tools, uniform, specialist clothing) or of a laptop
- Many used some of the funding to help with transport costs from their community to College

For those doing short courses, the funding was more likely to be instrumental to their decision to do the course. Some were unemployed, some on very low wages and some had families to support and most would not have been able to afford to do their chosen course without the support of the Fund.

## Learning journeys and vocational pathways

*“Everything's changed. I have my own Facebook page... It started with a hobby, but hopefully I can get myself a wee business out of it. It has bumped up my confidence a lot... before I would get very nervous, but now I jump right in and don't get nervous at all. I can see myself having a career rather than just a hobby.”*

*Fund beneficiary*

**Pauline Radcliffe consultancy services**

All but two of the 25 individuals interviewed as part of this evaluation were able to identify actual or anticipated outcomes for themselves as a result of their funded training or education. A total of 16 beneficiaries believed that the courses attended had improved their career prospects and over a third had increased their confidence either in their current employment situation or in seeking employment. Those supported to do a long course were most likely to cite opportunities for ongoing education or training and career development prospects as outcomes. Those completing shorter courses cited a range of outcomes either in their current or future employment opportunities and career progression. Please note that several respondents identified more than one outcome.

	Short course	Long course
<b>New/changed/improved employment</b>	2	
<b>Opportunities for further training or education</b>	2	7
<b>Career/career development prospects</b>	7	9
<b>Increased workplace/employment confidence</b>	3	6
<b>Own business</b>	1	

Respondents studying longer courses identified a range of improvements in their learning journey as a result of receiving this support including:

- More time to focus on study rather than work to earn money
- Alleviation of money worries making focus easier and improving chances of completion
- Being able to study at home when College closed and during holidays
- Having necessary equipment rather than having to borrow/rely on others
- Being able to go on College trips or field studies
- Owning equipment or reference books for future use in employment
- Being able to consider a further qualification on completion
- Reduced need to borrow money and therefore lower level of debt on course completion

Respondents receiving funding for shorter courses were able gain qualifications that they would otherwise not have had the opportunity to do - or may not have done for many years.

*“Even just getting up in the morning and going to do the course for 4 days and networking again made me feel good about myself, so it’s the psychological things too.”*

*Fund beneficiary*

They cite impacts on their opportunities at work or careers, including:

- Increased confidence in the workplace or additional life-skills

- New or better promotion/career progression opportunities
- Increased skills and performance at work
- Recognition at work
- Access to professional memberships and networks
- Route from unemployment into employment
- Owning their own equipment or tools
- Opportunities for self-employment
- Access to additional qualifications
- Increased motivation to train

Most respondents foresaw ongoing impacts into the future in terms of employment opportunities or progression, access to additional qualifications or opportunities to develop self-employment.

## Donald

### Profile

Donald is 57 and lives in Blackridge. He received an award of £720 to support him to do his Site Management safety Training Scheme course through *Sibbald Training*, a local commercial training provider in 2017.

### Applying for the award

Donald wanted to increase his knowledge and experience within health and safety and to obtain a recognised qualification. He responded to a flier that came through his door telling him about the Education and Training Fund.

### How the award was spent

The award was used to directly pay for the course fees, which Foundation Scotland arranged to be paid direct to the provider.

### The impact this has had

At the time of applying for the award, Donald was unemployed and could not afford to pay for this training course himself, but he wanted to improve his level of qualification to help himself to get back into work.

Donald's funded training helped him gain a great deal more knowledge and a far superior qualification to the one he had before. He now has employment with the NHS and uses the qualification in his role doing all the health and safety risk assessments for all 11 buildings in Scotland: he sits on 2 national boards and feels he has the confidence and insight to contribute effectively to those. He believes having this training will also allow him to take further career opportunities as they arise. He also has ambitions to gain further qualifications that would not otherwise have been possible for him.

*I not have been able to complete the course without the assistance I received.... As I have completed the SMSTS course the next stage or course within this field is the NEBOSH diploma which would be the pinnacle of professional learning for me.*

*This is the first course anyone's ever paid for - I've always had to save and wait. I am so grateful*

*It helped to bolster my cv and I use the safety side of it on a daily basis. It has given me increased confidence in the workplace and contributed to my personal development - I have a wider scope of knowledge.*

**Pauline Radcliffe consultancy services**

### Additional comments

Respondents were asked whether they had any additional comments, feedback or improvement suggestions. Most simply expressed their appreciation for the help that the funding has given them or re-iterated that the process of applying had been straightforward. The following areas for improvement were identified:

Several respondents thought that the Fund could be better 'advertised' to improve awareness, and that word of mouth is the best way to do this – one thought advertising in the *Falkirk Herald* would be effective and another mentioned Facebook.

*"...especially in this area - it's a deprived area - lots of people don't get the education in school because they are needed at home to look after the kids or whatever. People don't know about this. If more people knew, especially people my age that they could go back to education and get funding to help, more people would do it."*

*Fund beneficiary*

The staggered way the funding is released compared to when the course fees are due can mean people are out of pocket for a while

There was a small number of examples of misunderstanding or miscommunication about how to receive allocated funding or lack of clarity as to whether an award would go direct to a course provider or to the awardee

One respondent had not received his award letter in time to register on the course.

### 5.5 Recommendations

1. Word of mouth is the most effective approach to publicising the Award and additional ways of doing this could be explored. Linked to this, the Outreach Worker's visibility in eligible communities is clearly of benefit.
2. Further efforts to ensure that Limerigg and Slamannan communities can become engaged in the E&T Fund need to be prioritised in order to ensure they are benefitting proportionately.

Chapter 6 looks in further detail at the processes involved in delivering an effective grants scheme and makes recommendations for improving the collation of monitoring information. This would improve the E&T Fund's ability to report on the impact of the Fund on the Area of Benefit.

## 6. Effectiveness of processes and project delivery

### 6.1 Overview: key strengths

*“It’s been amazing.”*

*Fund beneficiary*

Since the first discussions held in 2016 involving EDF-R, Foundation Scotland and community representatives, the E&T pilot Fund has evolved into an easily understood grant scheme with simple eligibility criteria. The enquiry and application processes are jointly managed by Foundation Scotland and the Outreach Worker. The Fund has successfully expended more than its initial £26,000 per year budget (through further supplementing from the three individual community funds). It has reached 2.7% of the total population (4.9% of Avonbridge and Standburn’s population, 1.3% of Limerigg and Slamannan’s and 2.1% of Blackridge’s). Working Group members believe there is real value in trying to spread the benefit/funds as widely as possible in order to touch the lives of as many people as feasible with the funding provided.

Unlike many bursary schemes, the E&T Fund has assured funding for a period of 25 years – the lifetime of the windfarm - enabling promotional and development work within the communities and with external partners to build and consolidate over the lifetime of the project and across generations of families living in the Area of Benefit.

Expenditure of and engagement with onshore renewable energy Community Benefit funds can be extremely variable. Both EDF-R at other sites and Foundation Scotland (through administering over £4 million of these funds nationwide) have experienced a lack of engagement with and access to funds generated for community benefit purposes. This was also evident in the 3 Burnhead Moss ‘local community’ funds, which have been underspent. This is perceived as being due to the relative levels of ‘investment readiness’ of communities, and the need for a longer-term community capacity building approach. A key success of the E&T Fund has been its ability to engage residents directly with the Community Benefit of Burnhead Moss. Some members of the Working Group hope that the outcomes from the E&T Fund will, in themselves, lead to a more engaged and active community as residents engage with learning and acquire new skills.

*“As I am a theatre staff nurse and deal with burns and plastic surgery on a daily basis I wanted to further develop my skills in this area..... My employer helped with the funding of the course also, however the grant from EDF helped with train costs, new printer and software, to name a few. I have bought new evidence-based practice to my current workplace. Also, I have contacted the local youth club and nursery with some burn first aid info cards so they can display them. I enjoy learning and would be keen to learn more in child protection in nursing, as I could use this skill while helping out at the youth club.”*

*Fund beneficiary*

**Pauline Radcliffe consultancy services**

The Working Group has established itself as a consistent, engaged and pragmatic team, responding to feedback and challenges as they have arisen and flexing the scheme to meet local needs. Foundation Scotland have also put in considerable work to adjust their own in-house grant-making processes to meet the needs of this unique community led scheme. Significantly, the Working Group made an early decision that it would not be appropriate for them to be involved decision making on individual applications of local residents, given potential for perceived conflicts of interest, and insisted that Foundation Scotland itself process were mandated to make decisions on the Working Group' behalf, which it was able to do.

This chapter looks at what has worked well in the development, operation and administration of the E&T Fund and reflects on key learning points, making recommendations where improvements could be made. It is accepted that some of the recommendations have resource implications for the Working Group, Outreach Worker and Foundation Scotland, which would need to be assessed in terms of the overall costs of delivering the programme.

## 6.2 The Working Group and Foundation Scotland

The Working Group's membership currently comprises two representatives from each of the three sub-areas of benefit. Limerigg and Slamannan are represented by Action Group representatives since there is no functioning community council for the area. The group is supported and chaired by Foundation Scotland and is attended by the Outreach Worker who has been appointed since Summer 2018. Working Group members acknowledge the importance of Foundation Scotland's role as both a mediator in terms of early negotiations between community stakeholders and EDF R (Foundation Scotland's client) and through providing secretariat to the Group, following through on actions agreed at meetings.

Although the Group experienced some challenges in its early days of development, the current membership all report that it now operates on a positive basis, without 'partisan' community interests dominating discussions and taking a collective responsibility for decisions made.

*"We were a bit naïve and didn't know much about it when we joined; other people seemed to know more. We did a lot of listening at the beginning; we felt like rabbits in the headlights!"*

*Working Group member*

Decisions are restricted to the policy and operational principles of the scheme with the Working Group taking no part in assessing individual applications. Removing this potentially divisive role from the local community is perceived as a key element in successfully building trust in the scheme locally. It is interesting to reflect on how the principles of community empowerment have operated in practice here. Whilst decision



making is firmly rooted in the community and the scheme 'owned' by the Area of Benefit, there is no desire assume the responsibilities for the operational administration and management of the Fund: those involved already work hard in employed, self-employed and voluntary roles.

**Learning point 1: collaborative Working Group**

An example of this developmental and collaborative approach can be seen in the development of the Outreach Worker role. Avonbridge and Standburn's representatives took learning from the Blackridge 'community builder' role (briefly appointed to aid Fund development work in that village) and went on to develop a brief for piloting an outreach service in their community. Impressed at the professionalism and impact of the Worker, all three communities then adopted this approach and contribute to the service's costs through their own local community funds.

One representative expressed concern that, although he is co-opted onto Avonbridge and Standburn Community Council, his own home does not fall within the boundary of the Community Benefit area. Several members also felt that the Working Group needed to be formalised in some way, in order to legitimise and make clear their role, through establishing a Terms of Reference for the Group. An ongoing concern is around the age and demographic profile of the group, which does not reflect the general population of the area (e.g. home ownership, self-employed, employed).

**Recommendations**

3. The Working Group should agree and formalise its Terms of Reference, publishing as a public document, available to all those that request it.
4. The role of the Working Group member living outwith the catchment area, should be clarified in terms of his co-option onto the Working Group in a volunteer adviser capacity.
5. Encouraging young people who have benefitted from the grant scheme to date to participate in the Working Group should be an ongoing stated priority of the Outreach Worker.
6. The Working Group should consider 'succession planning' and recruit one new member of the group from each community cluster in the next year to work alongside the existing membership.

6.3 E&T Fund priorities and eligibility criteria

Whilst EFR-R was initially keen to see two Modern Apprenticeship places working at the Burnhead Moss site funded though the E&T Fund, substantial development work undertaken by all partners engaging with the two local Colleges, demonstrated that this was problematic and restrictive in terms of wider Community Benefit. (2 Modern Apprenticeships were eventually recruited but from the wider Falkirk area). Once EDF-R had accepted that a wider definition of eligibility was necessary, Working Group

members embraced the opportunity to be more ‘creative’ and promote the E&T Fund for ordinary residents, approaching some training providers to deliver courses tailored to local demand. For example, Sibbald Training operating near Blackridge was encouraged to offer training for forklift truck driving certification.

Priorities for funding

Whilst the following priorities are stated on the application material (Fund Factsheet produced in 2018), all eligible applications have been funded to date, regardless of where they sit within this ranking.

<b>Priority 1:</b>	Renewables & energy related.
<b>Priority 2:</b>	Engineering, construction, health and safety, other STEM related.
<b>Priority 3:</b>	Industries which will benefit local employment including childcare, forestry, plumbing, joinery, electrician, other trades related, haulage, agriculture. Also generic courses that enhance employability.
<b>Priority 4:</b>	Other education courses

The following chart shows the number of awards made under each of the priorities with an additional sub-division of Priority 3 (see Table 6.1) , where most awards (96, including those deferred and not yet expended) were made.

**Chart 6.1**

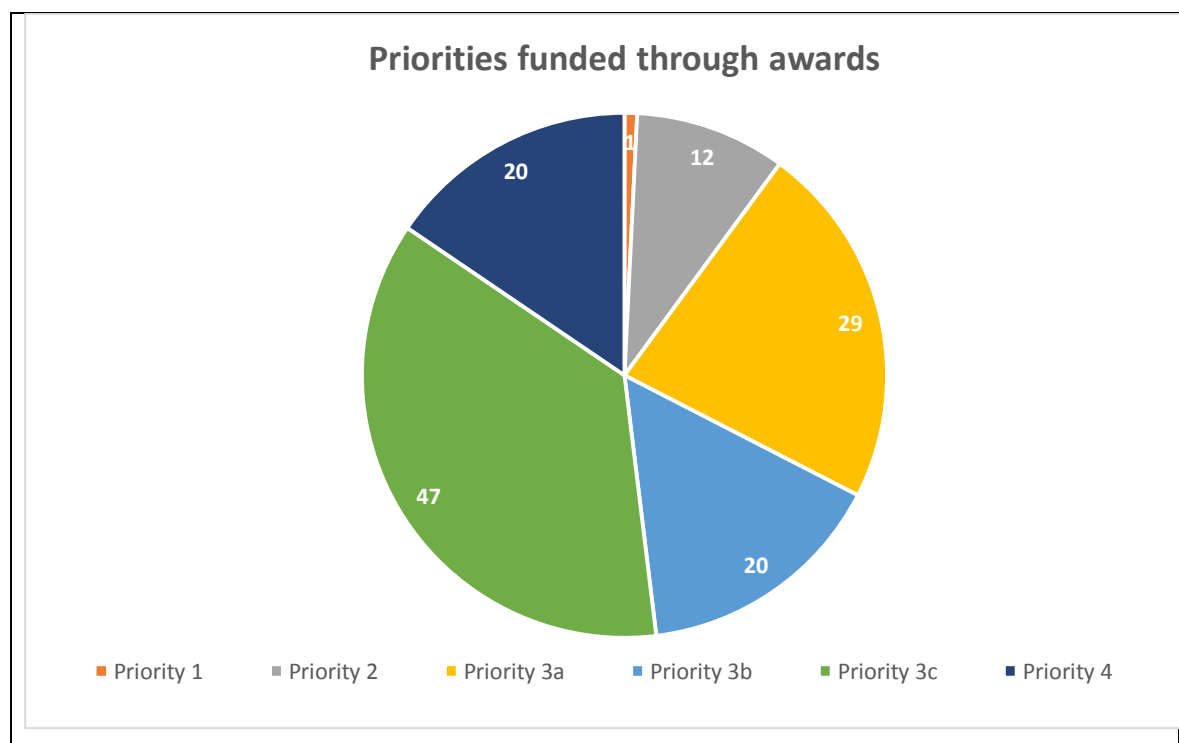


Table 6.1: Priority 3		Table 6.2: value of awards in each priority category		
<b>Priority 3a</b>	Industries benefitting local employment: forestry; plumbing, electrician, other trades, haulage, agriculture. Accountancy; hairdressing	<b>Awards by Fund priorities</b>		
<b>Priority 3 b</b>	Childcare, health and social care	<b>Priority 1</b>	1	£1,500
<b>Priority 3 c</b>	Generic courses that enhance employability; e.g. elementary food hygiene, First aid etc.	<b>Priority 2</b>	12	£15,920
		<b>Priority 3a</b>	29	£37,264
		<b>Priority 3b</b>	20	£26,620
		<b>Priority 3c</b>	47	£12,711
		<b>Priority 4</b>	20	£27,045

Table 6.2 also provides the cumulative totals awarded for each category, demonstrating that the majority of funds have been allocated to training and educational opportunities that were originally afforded a lower priority at the start of the pilot E&T Fund.

#### Eligibility criteria

Eligibility criteria are similarly, and deliberately broad with any individual living within the catchment area able to apply for funding. This includes family members of the Working Group. Recently the Working Group agreed that individuals who moved out of the Area of Benefit but commenced training whilst still resident within the catchment, should no longer be eligible for award, regardless of whether their parents still live in the area.

Eligibility is not means tested, since this would be problematic given the Data Protection regulations relating to data sharing between agencies as well as administratively burdensome; no estimate of parental contribution is required. The application does require the individual applicant to provide a self-declaration of other income received to support studying for the course. Application guidance advises that other income may be a factor in determining the level of award given, although this does not seem to have been applied to date. This may include SAAS grant for tuition fees, bursary towards living costs and loan or Education Maintenance Allowance and bursaries available through application to Colleges. From the completed application forms reviewed as part of this evaluation, it appears that applicants are generally upfront and honest about other financial resources received.

School aged children 16+ (such as those attending College and school for Foundation Apprenticeships) are only eligible to apply for costs that are not covered by the school, the College or the local authority.

Priority is stated as being given to vocational courses at local training facilities but to date the availability of funding has allowed the E&T Fund to grant awards to several undergraduate students studying at universities further afield (including the Open University).

Whilst most Working Group members and other stakeholders interviewed as part of this process were happy with the very broad application priorities and criteria, there were several points made which will become more prescient should the Fund become overspent.

### **Learning Point 2: Targeting of community led E&T Fund**

Future options for prioritisation raised by stakeholders were:

- Prioritisation of applications from those not currently in education or employment (NEET) for vocational courses
- Pro-active encouragement of those already working with support agencies and organisations working with individuals experiencing disadvantage and inequality, including those with additional support needs
- Prioritisation of those who have not yet received a grant
- Only fund top 3 existing priorities
- Lowest priority given to those merely wishing to attend leisure courses for personal interest
- Making ineligible applications from those that previously received an award and did not take up funding
- Seek other external funding sources to 'top up' the E&T Fund.

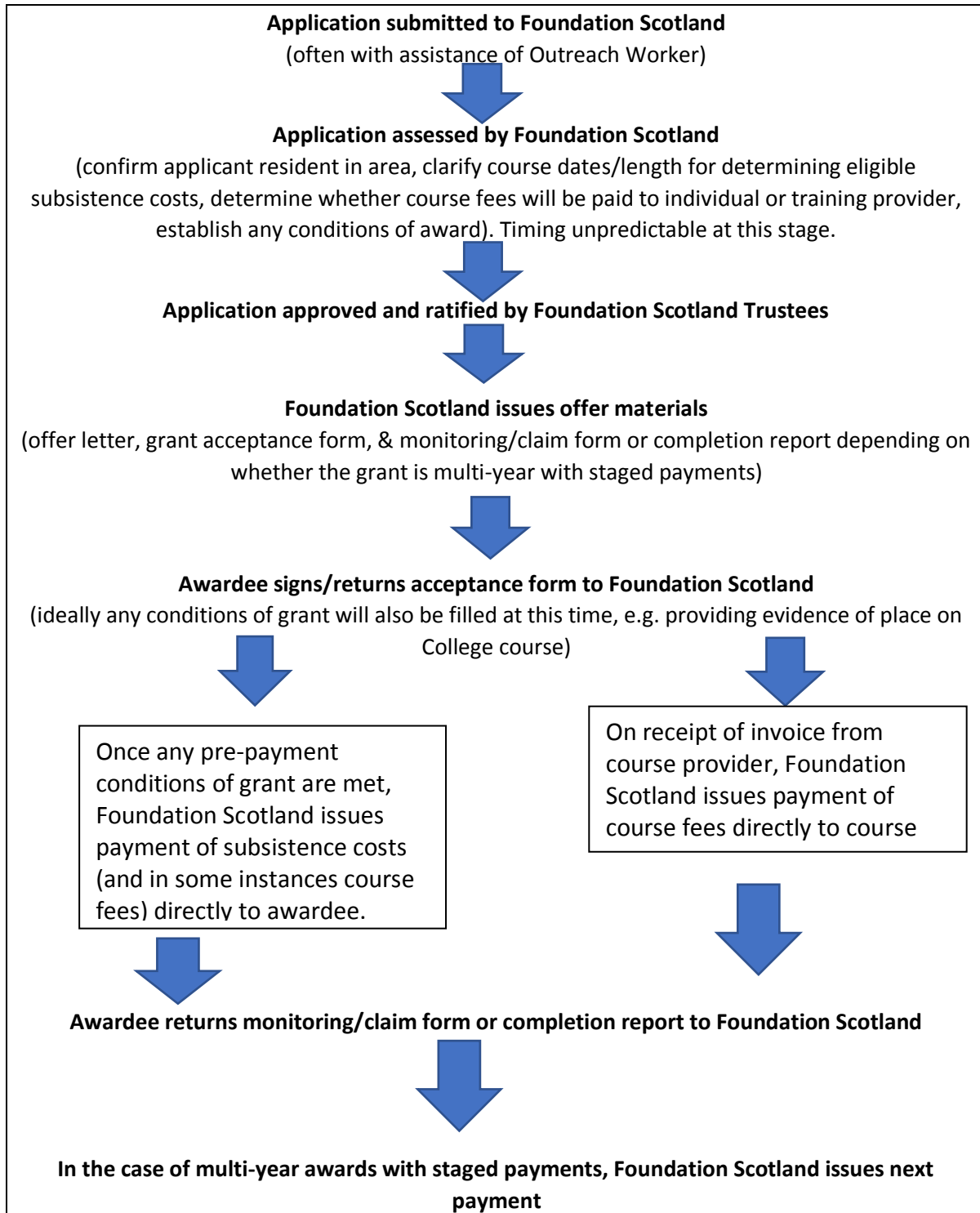
### **Recommendations**

7. The Working Group should decide whether it wishes the E&T Fund to operate on a 'first come first served' basis, until funds have been completely committed within each funding round.
8. Consideration should be given to reviewing the existing prioritisation and the views provided above, to confirm whether any restrictions should be implemented in terms of the type of applicant or nature of education/training.
9. Prioritisation of Outreach Worker time should be considered in terms of effective ways in which to target priority groups such as NEET, including engaging with agencies working with these groups.

#### 6.4 Application process

The process chart below summarises the key steps from submission of the application to disbursing grant payments, prepared by Foundation Scotland.

Overall, there is a positive response to the way in which the application process works and Working Group members believe it as simple as it needs to be. The application form is regarded as straightforward and this was endorsed by the applicants interviewed as part of this evaluation. The Outreach Worker suggests only one or two small amendments to formatting to ensure the application form is more dyslexia-friendly.



One or two of the awardees interviewed had experienced problems with application processing and payments. It has been challenging for Foundation Scotland, working with the Outreach Worker, to find ways to address direct payment of fees for short courses at the 2 local Colleges, where online payment is requested when booking.

One awardee found that with funding released at the same time as course fees are due, she would be 'out-of-pocket' for a while. Another found the wording of his award letter ambiguous and this led to him not being registered on his chosen course locally. Learning point 3 highlights an example of where processes might be improved.

### **Learning point 3: Refining application materials and processes**

The beneficiary applied in August and heard nothing for several weeks. He then got a letter dated 5 weeks before it arrived to say his application had been successful and the money was allocated. The course began in December. The letter implied there was nothing else he needed to do, though on reflection it wasn't clear whether the money was coming to him or going direct to the provider, but the wording led him to - wrongly - assume the latter. A week before the course was due to begin, he discovered through contacting the provider (because he hadn't heard from them about joining) that they had no record of him. Because this was the last course available locally for several months, he eventually attended similar training in Carlisle.

### **Recommendations**

10. Invite Outreach Worker to make recommendations for amendments to application form.
11. Engage with the two Colleges at a more senior level and through their Widening Access teams to resolve these administrative and strategic challenges (the Outreach Worker has recently made contact with the Principal of one College).
12. Review award letter paperwork with support of Outreach Worker, creating separate templates (up to 3) according to the nature of the grant and to whom it will be paid

Working Group members were also concerned about the need to for timely payment of subsistence costs (largely travel) to recipients, particularly from low income households, prior to expenditure being incurred. One member felt that recipients may experience low financial capability (knowledge of and access to banking etc.) although there was no evidence of this in those surveyed.

### **Learning point 4: Practical challenges of community-led grant-making activity**

Practical challenges involved in ensuring that funding reaches beneficiaries in ways that are accessible to residents have been encountered as this bespoke pilot E&T Fund has developed. For example, whilst Foundation Scotland makes timely payments into individual bank accounts prior to costs being incurred, sometimes applicants do not have a personal bank account, or may not wish to be paid in this way, (anecdotally) due to the perception of this threatening benefit entitlement.

**Recommendations** that might address this are four-fold, both practical and developmental.

13. Ensure that the Outreach Worker is written into Foundation Scotland's Scheme of Delegation for this funding stream.
14. Set up a local post office instant access savings (or other building society) account in the name of the Foundation Scotland, with Outreach Worker authorised to withdraw cash and deposits made only by Foundation Scotland.
15. Approach Falkirk Credit Union to encourage them to promote their services in the area, as an accessible way to save and expend money locally.
16. Should the need be evidenced that financial capability is an issue, an approach might be made to banking Foundations (such as the new *Standard Life Foundation* operating from Edinburgh).

### 6.5 Award values and budget

Early in the development of the E&T Fund, one Working Group member undertook research into factors which might determine the maximum value of grant award for each category. Costs such as public transport fares from the Area of Benefit to local training providers, childcare costs, and the costs for new learning aids, such as a laptop, were all considered.

As a result, the following parameters were established:

- **Short courses (under a year):** both fees and travel, childcare and subsistence costs could be considered. The smallest grant made for a short course was £60.00 to an awardee attending an Elementary REHIS Food Hygiene course; the maximum grant made was for £995.00 for a hospitality related course.
- **Courses of one year or more:** up to £5.00 per day subsistence is offered for up to 3 years, with up to a maximum of £600 towards equipment in Year 1. The maximum single award made for this category (which includes NC, HNC and Degree level courses) is for £3,300 for a degree level course.

Most Working Group members reported that they were happy with the current parameters, although one thought that the maximum grant of £600 for equipment could be a little more flexible where the costs of new tools (such as for a professional trade) were required at the start of a course or Modern Apprenticeship.

Through the ongoing work of Foundation Scotland and the Outreach Worker, training providers have been paid directly for fees, eliminating the need for the awardee to handle the funding themselves. This ensures that the funding goes directly for the purposes intended.

For grants that do not cover fees, the monitoring form that is required to be returned to Foundation Scotland asks awardees to specify the costs that their grant covered. However, there is no requirement for awardees to provide evidence that the expenditure was incurred for these activities/ items. Since grants are made 'up-front' rather than retrospectively, to ensure that awardees are not generally out-of-pocket, this is a practical approach. There are a few instances where an awardee has received funding for equipment, such as a laptop, but has reported that they have not yet purchased the item.

### **Recommendations**

17. Given the Working Group's stated aim of ensuring that the funding reaches as many residents as possible, it should consider setting maximum grants per individual awardee over a three- year period.
18. Consideration might be given to raising the maximum grant size for equipment but requesting that evidence of total costs of item is provided following award of the grant.

### The budget for the E&T Fund

Currently 20% of the total funds for the Burnhead Moss Area of Benefit are allocated to the E&T Fund, initially £26,000 per year now rising to £27,000. In the last year this has been supplemented by £8000 from each the 3 local Community Benefit funds, totalling an additional £24,000.

In order to adequately plan and budget for future year's grants, there would be merit in formalising the additional amount of funding over three years that could be expected from each of the sub-funds. This is important not just for grant awards, but to confirm the contracted hours of the Outreach Worker.

As is seen in chapter one of this report, Limerigg and Slamannan has, relative to its population size, not benefited proportionately from the E&T Fund, but has contributed the same funding as the other 2 community clusters. Currently the Working Group members are happy with this approach.

### **Recommendations**

19. Formalise an additional fixed percentage amount of funding to be contributed from each of the 3 sub-areas of benefit.
20. Target development efforts in the Limerigg and Slamannan communities (this is already planned).

## 6.6 Outreach Service

An Outreach Worker now works for all 3 community clusters in the Area of Benefit for 15 hours each week. The role evolved, initially through a short-lived development role



appointed in Blackridge during early 2017 and thereafter following further research by the Avonbridge members of the Working Group who appointed a local resident to the role. This was funded, from June 2018, through their community’s sub-funds. Having witnessed the impact of the role in the communities of Avonbridge and Standburn over three months, the two other community clusters have also agreed to contribute to funding the role, with the Outreach Worker splitting her hours between the 3 sub-areas.

**Learning point 5: Harnessing local talent**

One of the perceived reasons for the success of the Outreach Worker’s role has been their visibility within the community not only as a worker but a longstanding resident, who understands the area’s challenges and already has a good knowledge of local authority services through her work as a library assistant. Through seizing an opportunity to utilise the skills and local knowledge of a young adult who had already expressed a commitment to community engagement through the earlier Community Planning consultation carried out by the Community Council, the Working Group has been able to engage with young adults of working age who might otherwise have found the E&T Fund inaccessible. On a personal level, the post-holder also has experience of supporting people with additional support needs (ASN) and utilises this in supporting adults to understand the application process.

Although the role has only been in place for 7-8 months, a high level of engagement has been achieved, evidencing impact on the delivery of the E&T Fund’s aims. Of 109 enquiries dealt with by the Outreach Worker, 70% were successful in accessing funding and proceeded with education and training. Over half of applicants (55) requested support to complete their application. 40 of those who used the drop-in service to enquire about funding, went on to receive support for accessing courses.

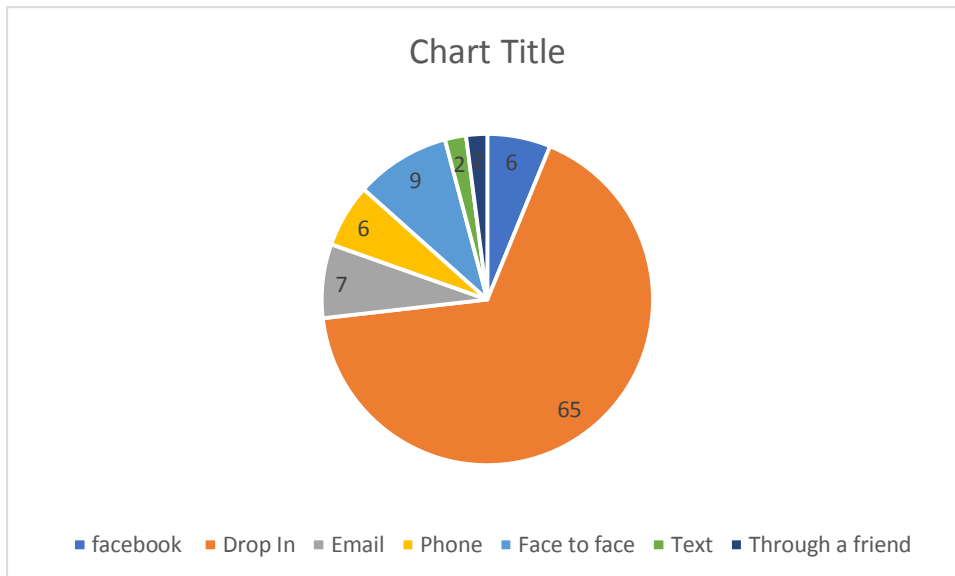
**Table 6.1: Outreach Worker: enquiries dealt with and conversion to successful applications**

Support requested/ provided	No support necessary	No funding received	not known	Funding accessed	Applied for course	didn't proceed with application
55	54	28	3	77	70	35

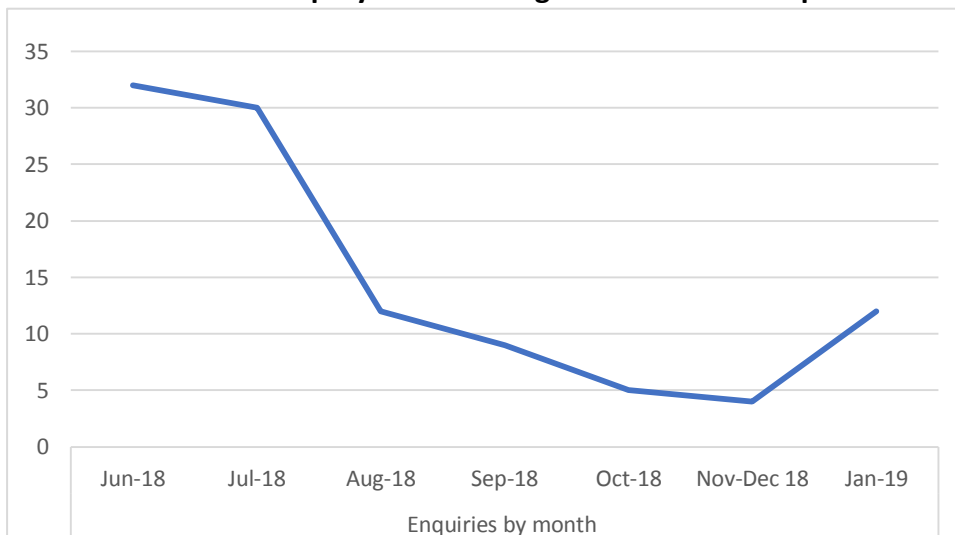
Comparing these figures with the total number of applications to the Fund since the first award was approved in December 2016, it appears that the same number of awards have been granted in the last 7- month period as had been for the initial 19 months. Although it is not possible to attribute this solely to the Outreach Worker’s role (since data is held on separate databases), it seems likely that this is a factor in the increase in applications over the timeframe.

The following charts demonstrate the impact of the role in reaching large numbers of the community. Of a total 97 enquiries, 61% of those using the drop-in service went on to request support with considering and applying for training or education.

**Chart 6.2: Numbers engaging with Outreach Worker in 7-month period, by method of engagement** (total 97 enquiries where communication method known)



**Chart 6.4: trends in enquiry levels throughout the 7- month period.**



**Operational Delivery of outreach role**

The outreach role has clearly been instrumental in growing the capacity of the community to respond to the opportunities that the E&T Fund affords residents and is highly valued by the Working Group. In common with all aspects of this bespoke scheme, the administrative and management arrangements for the Outreach Worker have been developed as a practical response to community need, taking into account communities’

needs and the postholder’s welfare. It may now be timely to review the administrative, professional development and support arrangements for the role, taking into account Working Group members’ expressed concern about maintaining business continuity should the current post-holder wish to progress her career elsewhere, with a suggestion that ‘shadowing’ of the role should take place by a community volunteer.

### Development of the role

The job purpose was originally described as providing support to:

“develop (people’s) understanding of their training needs and work potential (in order) to assist and navigate the application process.”

*Job purpose described in draft Job Description prepared by Avonbridge and Standburn Working Group members.*

The table below provides a breakdown of the key duties, based on an estimate provided by the Outreach Worker of how her time is apportioned each week (on average; there are obviously peaks and troughs in enquiries according to the time of year) and additional tasks that have emerged as the role has evolved. The table denotes in green those new tasks with potential to have significant impact on the future operation of the E&T Fund.

**Table 6.4: Duties and tasks of Outreach Worker**

Original stated duties	% time	Additional tasks
Establishing a presence in the Community via Drop-in sessions in Blackridge, Avonbridge and Slamannan	70% On average each session 2-2.5 hours per week	Arranging group/ block courses
Meeting prospective candidates to discuss opportunities available Assisting individuals to research training options		Identifying other funding options in addition to E&T Fund
Assisting with applications for courses and funding		Working with candidates with ASN Assisting awardee’s with travel expenses and any other paperwork requested by FS
Creating and maintaining a catalogue of training opportunities	20%	Sending applications to FS Liaising with training providers on behalf of applicant to arrange course and agreements for payment, bookings
Connecting and mobilizing people: using social media		Managing FB page and following up on all enquiries

		Monitoring applicants' progress
		Maintaining a client database
Building relationships with local schools, Colleges & training providers	5-10%	Approaching other agencies delivering vocational support in the area e.g. SDS, JobCentre+

#### **Outreach Worker tasks carried out working 15 hours per week**

Building relationships as part of promotional activity is relatively under-resourced at present. Given the stated importance of reaching as many residents as possible within the Area of Benefit, it would be worth reviewing the time allocation to this activity as part of an overall review of the contracted hours.

#### **Recommendations**

21. Form a short-life working party to develop an agreed job description for the Outreach Worker role, reflecting the findings of this evaluation. This working party should also consider identifying a member of the Working Group as a key point of contact for the post-holder.
22. Review current apportionment of time and assess where resource should either be diverted or further time allocated.
23. Foundation Scotland to formalise the contract for this freelance service, reflecting HMRC guidance on self-employment for regular, ongoing service delivery.

#### **6.7 Monitoring project outputs, outcomes and the recording of data**

As has already been identified, Foundation Scotland have invested time and resources in designing the key features of the pilot scheme and adapting their existing systems to accommodate. Through allowing the pilot programme to evolve at its own pace, Foundation Scotland has integrated developments, as they arise, into a workable system. After 3 years of operating the pilot, it is timely to review some of the areas where data capture could be improved in order to enhance the monitoring of the E&T Fund's future impact.

The Outreach Worker has, purely on their own initiative, also collated relevant information on each enquirer and applicants. However, there much more could be made of both data recording methods were they co-ordinated in some way, potentially avoiding duplication of effort.

### **Learning point 6: co-ordinating data recording and monitoring reports**

In terms of monitoring future impact of the E&T Fund, it will be important to develop and maintain co-ordinated information recording between the Outreach Worker and Foundation Scotland's own systems. Currently both keep records, but information is not shared or consistent in level of detail about applicants (e.g. current employment status is recorded by the Outreach Worker but not by Foundation Scotland). It would be helpful to review what data needs to be recorded and by whom. This will need to be accommodated within the constraints of Foundation Scotland's bespoke grant management system which is used for all their programmes.

### **Recommendations**

24. The Outreach Worker and Foundation Scotland should work together to propose a data set that will be collected for all future applications, clarify what the Outreach Worker should be collecting to either integrate this into grant management systems or take a decision to make the role responsible for data collection.
25. Decision should be taken on the all categories on which the Working Group and Foundation Scotland wishes to report on to improve future impact reporting (including longitudinal surveys). Specifically, application form and data recording should include:
  - How the applicant heard about the E& Fund
  - Whether they have been in contact with Outreach Worker as part of the process
  - Duration of course
  - Employment status of applicant
  - What the grant was spent on (equipment, fees or subsistence should be data fields in themselves)
  - Outcomes/ future vocational pathways of applicant

### 6.8 Promotion of scheme

Three key approaches have been taken to promotion of the E&T Fund and the opportunities it affords for residents within the Area of Benefit:

- Direct to residents: through word of mouth, social media, leafleting and newsletters/ news articles
- Through intermediary partner organisations: training providers and agencies working on employability initiatives which might support residents.
- Through businesses that may benefit from bespoke training to develop their workforce.

Much has been achieved to date in addressing direct communication with residents, although more could be done. As chapter five indicates, word of mouth was consistently identified as the most common way that respondents had heard about and engaged with the E&T Fund. Many of those interviewed reported that they had only heard about the scheme through a relative or friend by chance. Although leafleting was less often cited -

several respondents stating that they did not generally read publicity posted through their door - it clearly has a role, particularly in reaching the more remote homes/farm steadings in outlying areas.

The Working Group as individuals have already contributed considerably to word of mouth communications through promotion at events and to community organisations, particularly where they can mention the Fund as an additional benefit to the main Community Benefit fund operated for their community cluster. This is more challenging where community infrastructure is weaker and there are few operational community organisations.

### 6.9 Training and support agency engagement

Progression in engaging with training providers has been incremental, not least since consistency and engagement of College contacts has been variable. The Outreach Worker is now addressing this and directing attention to senior level staff at the two Colleges, together with the Widening Access teams (which may be able to offer locally based training where there is a demand). Initially contact with one College was made through the Commercial Development section of the institution, which does not have a remit for engaging with not-for-profit community groups. Clear signposting from the College at senior level is essential in order to establish consistent contacts for:

- Admissions enquiries (finance and course application progress)
- Course leaders
- Widening accessing teams.

That said, both Colleges now do alert students in the catchment area to the E&T Fund and one features a link to the Fund's webpage on its own website.

The Outreach Worker is developing positive relationships with key training providers for popular vocational courses, including liaison on transportation to their site for block bookings.

#### Employability/ skills development organisations

The Outreach Worker is aware that it is important to engage with these agencies and has been attempting to make contact, although has had little response to date. A number of organisations have an established remit to support some of the activities already undertaken by the Outreach Worker, particularly in identification of skills needs and career development. The following list is not exhaustive but demonstrates the range of agencies engaged:

- **JobcentrePlus**: data on skills gaps, employer needs
- **Skills Development Scotland**: Falkirk and West Lothian offices: data on skills gaps, identification of individuals who could benefit from the funding;

- **Employability & Training teams of each local authority:** identification of individuals who could benefit from the funding and existing training schemes;
- **Business Gateway:** alerting new and developing businesses to availability of training funding for self-employed, business start-ups, and internal training for teams (a local authority run service).
- **High schools and Developing Young Workforce teams,** including Community Learning and Development schools-based workers; and
- **Activity Agreement** workers (local authority).

Community Learning and Development in one of the areas has already agreed to provide contact details for relevant service leads based in local authorities.

#### Engaging with businesses who may benefit

The current E&T Fund Factsheet offers businesses operating within the Area of Benefit the opportunity to access training on behalf of their staff teams, but this has not been taken up to date. One Working Group member reports that an initial approach to a local business was declined, due the owner's reluctance to be seen to be benefitting from community funding. There may, however, still be opportunities through Business Gateway and associated economic development services (who will hold a business database), for promotion of this offer to businesses identified in the area.

#### **Recommendations**

26. Working Group to continue to promote the Fund through word of mouth, at community events and local community organisations (e.g. childcare facilities).
27. Develop engagement with Colleges at senior level in order to establish consistent contacts (Outreach Worker has now established this with one College). The impacts identified in this report should be used to emphasise the importance of the E&T Fund to these areas.
28. Prioritise engagement with key agencies over a specified timeframe and review progress.
29. Enlist support of Community Learning and Development and/or Employability team to organise meeting with key contacts within local authorities
30. Consider the resource implications of prioritising partner engagement as part of Outreach Worker role.

## 7. Summary of recommendations

The following points summarise the recommendations of this evaluation and review for Foundation Scotland, EDF-Renewables and the Working Group's future consideration. Other external skills development and employability stakeholders may also wish to take actions based on the recommendations made in order to enhance their own service delivery to the local population.

The recommendations are divided into 3 sections:

- Outreach and promotion
- Programme impact and priorities
- Management and administration of the Fund

### 7.1 Outreach and promotion

- a) Word of mouth is the most effective approach to publicising the E&T Fund and additional ways of doing this could be explored. This includes the Working Group continuing to promote the Fund through word of mouth, at community events and local community organisations (e.g. childcare facilities).
- b) Linked to this, the Outreach Worker's visibility in eligible communities is clearly of benefit.

#### Prioritisation of outreach activities

- c) Further efforts to ensure that Limerigg and Slamannan communities can become engaged in the E&T Fund need to be prioritised in order to ensure they are benefitting proportionately.
- d) Prioritisation of Outreach Worker time should be considered in terms of effective ways in which to target priority groups such as NEET, including engaging with agencies working with these groups.

#### External stakeholder engagement

- e) Develop engagement with Colleges at senior level in order to establish consistent contacts (Outreach Worker has now established this with one College). The impacts identified in this report should be used to emphasise the importance of the E&T Fund to these areas.
- f) Prioritise engagement with key agencies over a specified timeframe and review progress.
- g) Enlist support Falkirk Council's Community Learning and Development and/or Employability team to organise meeting with key contacts within local authorities, as detailed in chapter 6 of this report.
- h) Consider the resource implications of prioritising partner engagement as part of Outreach Worker role.



- i) Contact Falkirk Credit Union to establish a local relationship which could be of benefit to awardees in managing finances. Should the need be evidenced in future that financial capability is an issue, an approach might be made to banking Foundations (such as the new *Standard Life Foundation* operating from Edinburgh).

## 7.2 Programme impact and priorities

- a) The Working Group should decide whether it wishes the E&T Fund to operate on a '*first come first served*' basis, until funds have been completely committed within each funding round.
- b) Consideration should be given to reviewing the existing prioritisation and the views of stakeholder on alternative approaches to prioritisation.
- c) The Working Group should confirm whether any eligibility restrictions should be implemented in terms of the type of applicant or nature of education/training.
- d) Given the Working Group's stated aim of ensuring that the funding reaches as many residents as possible, it should consider setting maximum grants per individual awardee over a three- year period.
- e) The Working Group should also consider raising maximum grant size for equipment but requesting that evidence of total costs of item is provided following award of the grant.
- f) Consideration should be given to formalising an additional fixed percentage amount of funding to be contributed from each of the 3 sub-areas of benefit.

## 7.3 Programme management and administration

### The Working Group

- a) The Working Group should agree and formalise its Terms of Reference, publishing as a public document, available to all those that request it.
- b) The role of the Working Group member living out with the catchment area, should be clarified in terms of his co-option onto the Working Group in a volunteer adviser capacity.
- c) Encouraging young people who have benefitted from the grant scheme to date to participate in the Working Group should be an ongoing stated priority of the Outreach Worker.
- d) The Working Group should consider 'succession planning' and recruit one new member of the group from each community cluster in the next year to work alongside the existing membership.

### Administrative and grant management processes

- e) The Outreach Worker should be invited to make recommendations for amendments to application form

- f) Foundation Scotland should review award letter paperwork with support of Outreach Worker, creating separate templates (up to 3) according to the nature of the grant and to whom it will be paid.
- g) Ensure that the Outreach Worker is written into Foundation Scotland's Scheme of Delegation for this funding stream.
- h) Set up a local post office instant access savings (or other building society) account in the name of the Foundation Scotland, with Outreach Worker authorised to withdraw cash and deposits made only by Foundation Scotland.
- i) Form a short-life working party to develop an agreed job description for the Outreach Worker role, reflecting the findings of this evaluation. This working party should also consider identifying a member of the Working Group as a key point of contact for the post-holder.
- j) Review current apportionment of time for outreach activity and assess where resource could either be diverted or further time (and payment from general funds) allocated.
- k) Foundation Scotland to formalise the contract for this freelance service, reflecting HMRC guidance on self-employment for regular, ongoing service delivery.

#### Monitoring impact

- l) The Outreach Worker and Foundation Scotland should work together to propose a data set that will be collected for all future applications, clarify what the Outreach Worker should be collecting to either integrate this into grant management systems or take a decision to make the role responsible for data collection.
- m) Decision should be taken on the all categories on which the Working Group and Foundation Scotland wishes to report on to improve future impact reporting (including longitudinal surveys). Specifically, application form and data recording should include:
  - How the applicant heard about the E& Fund
  - Whether they have been in contact with Outreach Worker as part of the process
  - Duration of course
  - Employment status of applicant
  - What the grant was spent on (equipment, fees or subsistence should be data fields in themselves)
  - Outcomes/ future vocational pathways of applicant

## APPENDICES

## Appendix 1

### Foundation Scotland

#### Evaluation of the EDF Renewables Burnhead Moss Education & Training Fund

#### Questions for telephone interviews with awardees

##### Introduction

- Introduce researcher, purpose of evaluation
- Assurances re confidentiality
- Permission for recording

##### Background

- 1 Firstly, if you can remember, can you tell me how you heard about the Fund?
- 2 What was the main reason you applied?  
*Probe re whether had any help/support with application, who from and extent to which this was instrumental in decision to apply...*
- 3 According to the information we have, you received £.... towards..... Is that right?  
  
*Note any variations....*
- 4 And when did you/will you have completed the course?
- 5 Do you think you would have done the course if you hadn't received the funding?  
*Why/why not?*  
*Probe re whether funding enabled them to do the course at all, or made doing it easier/more affordable*
- 6 And what has changed for you, if anything, as a result of doing this course?  
*Probe re:*
  - *impacts on personal development (confidence, self-esteem, life skills, etc.)*
  - *destination/job/role that they have been able to achieve as result of qualification*

## APPENDIX 2

***EDF Renewables Burnhead Moss Education and Training Fund: a review  
and evaluation of the first 3 years***

***Internal Stakeholder topic guide***

**1. Introduction**

- Introduce researcher, explain purpose of evaluation and interview
- Reassurances about confidentiality
- Permission to record (as appropriate)
  
- Any questions?

**2. Background**

- Role/nature of involvement, length of involvement
  
- Reasons for getting involved (*as a community member or a administrator/  
employed worker*). When they first got involved, what were their personal  
expectations/ aspirations for the Fund?
  
- Perceptions of key challenges faced by the communities in relation to  
training/education/skills development\*

***Prompt for variations in perceptions of each distinct community, lifestage or other  
individual characteristics.***

**3. Set up of fund**

- Views on process of setting up and negotiating with EDF

***N.B. already aware of negotiation over value and focus of Fund, so focus will be on any  
other areas identified.***

- What worked well? What took more effort than expected?
  
- What have they learned personally and as communities/ administrators?
  
- If they could go back and redefine, what (if anything) would they change about  
the way it was set up (policy priorities, reporting etc)?

#### **4. Operation of fund**

- What, if anything, would they change about the way it *operates*? (application procedure, assessment, prioritisation)?
  - Why?
- What works well? Main strengths of approach? > Outreach Worker.

***In particular, probe the perceived impact of Outreach Worker in communities. How could this be developed further?***

- What could be improved? Any weaknesses of approach?
- What do they think of the eligibility criteria? Are they fair?
  - Why/ why not?
- What do they think of the levels of individual award available? Are they sufficient to make a difference? Would they alter any?
- 
- Is each community fairly represented and treated?

#### **5. Operation of Working Group**

- How effectively does the working group operate?
- Any problems or difficulties they would like to see addressed going forwards?
- Are roles and remits (of individuals, the group as a whole and FS) clear enough?
  - IF NOT, what needs clarifying or formalising?

#### **6. Impact of Fund**

- Is the Fund reaching the right people? How do they know?
- Who, if anyone, is not being reached?
  - Are there any types of people or groups they feel are over or under represented amongst recipients?
  - What needs to change to target any groups/people not sufficiently included?
- Do applicants have access to sufficient support and encouragement? (Outreach Worker, time spent in each community).
- IF NOT, what are the barriers? what is needed that isn't currently accessible/ available?

#### **\*PLAY BACK KEY CHALLENGES THEY IDENTIFIED EARLIER**

- Which is the fund addressing?

- How effectively?
- Which does it not effectively tackle and why?
- What are the perceived main impacts to date?
  - For individual awardees
  - For the community more widely?
- Any knock-on impacts?
- Any unexpected impacts?

**PROMPT FOR POSITIVE AND NEGATIVE IMPACTS**

**Finally....**

- If they were the big boss of everything, what would they change about this fund?
- What would be their first priority for development of the fund over the next 3 years?

Anything else to add or cover?

**For Working Group Stakeholders only**

- Views on the support and input of Foundation Scotland
- What are FS doing well?
- What could they do better?

*Probe communication, level of support/ advice, degree of autonomy etc.*

7 Do you anticipate any other impacts for you in future?

*Probe for full details and attribution*

**INTERNAL STAKEHOLDERS INTERVIEWED**

<b>Name</b>	<b>Role</b>
<b>Rachel Searl-Mubulu and Rosalind Beecroft</b>	Foundation Scotland
<b>Heather Baird</b>	Freelance BMET Outreach Worker
<b>Kate Strachan and Marion Stewart</b>	Blackridge Community Council representatives on Working Group
<b>David Cameron</b>	Working Group member
<b>Jo Hirst</b>	Avonbridge and Standburn Community Council representative on Working Group

***EDF Renewables Burnhead Moss Education and Training Fund: a review  
and evaluation of the first 3 years***

***External Stakeholder topic guide***

**7. Introduction**

- Introduce researcher, explain purpose of evaluation and interview
- Reassurances about confidentiality
- Permission to record (as appropriate)
  
- Any questions?

**8. Background**

- Role – organisation’s purpose in relation to Fund
- Involvement and contact with the Fund (if any), Foundation Scotland and the Working Group (and its Outreach Worker)
  
- Understanding of Community benefit funds and specifically, the Burnhead Moss education and training fund.
  
- Perceptions/ knowledge of key challenges faced by the communities in relation to training/education/skills development\*

***Prompt for variations in perceptions.***

**9. Set up of fund (where relevant to interviewee: only Council contact)**

- Views on process of setting up and EDF Renewables negotiation
  
- What worked well? What was more challenging than expected?
  
- As an external party with an interest in training and employment opportunities in the area, what (if anything) would they change about the way it was set up (policy priorities, reporting etc)?

**10. Operation of fund**

- What, if anything, would they change about the way it *operates*? (application procedure, assessment, prioritisation)?
- Why?



- What works well? Main strengths of approach? > knowledge of Outreach Worker.
- What could be improved? Any weaknesses of approach?
  
- What do they think of the eligibility criteria? Are they fair/ too broad/ take account of need?
  - Why/ why not?
  
- What do they think of the levels of individual award available? Are they sufficient to make a difference?
  - Would they alter any?
  - What other sources of funding are they aware of that serve the same purpose?

## **11. Impact of Fund**

### **On individuals and communities:**

- Is the Fund reaching the right people? How do they know?
  
- Who, if anyone, is not being reached?
  - Are there any types of people or groups they feel, based on their knowledge, are over or under represented amongst recipients?
  - What needs to change to target any groups/people not sufficiently included?
  
- Do applicants have access to sufficient support and encouragement?
  
- IF NOT, what are the barriers? what is needed that isn't currently accessible/ available?

### **On the local economy:**

- What is their perception/understanding of skills needs shortfalls in the local economy currently?
  
- Which is the Fund addressing?
  - How effectively?
  - Which does it not effectively tackle and why?
  
- What more could the Fund do to help fill these gaps?

### **Probe training provider knowledge of local employment and training opportunities and support available**

- Is there anything more that the Working Group could do to promote the Fund and link to other sources of information and advice?

### **Finally....**

- If they were the big boss of everything, what would they change about this fund?

- What would be their first priority for development of the fund over the next 3 years?

Anything else to add or cover?

**EXTERNAL STAKEHOLDER INTERVIEWED**

<b>NAME</b>	<b>ROLE</b>
Leanne Watson	EDF Renewables
Frank McCourt	Falkirk Council Community Development
Miles Laggan	Forth Valley College
	Sibbald Training

**Jackie Galbraith, Principal of West Lothian College, was also contacted.**

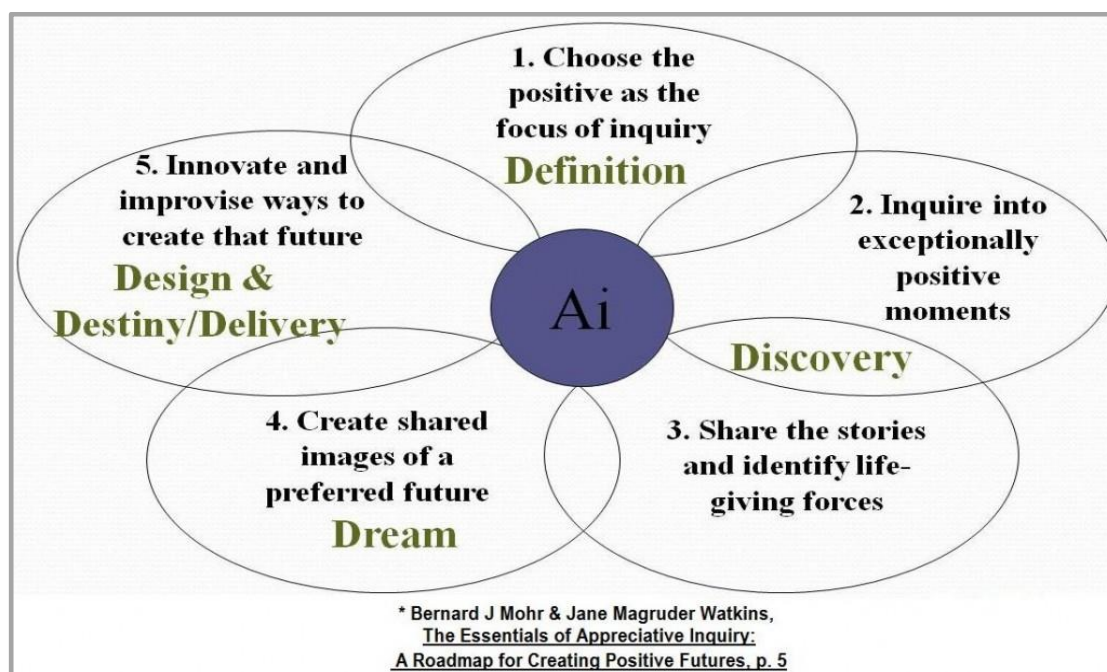
## APPENDIX 3

### EDF Renewables Burnhead Moss Education and Training Fund: review of the first 3 years

Working Group meeting  
Monday 28 January 2019, Slamannan Community Education Centre

#### Appreciative inquiry

In order to capture the Working group's experiences and views on the Fund and its success, we undertook a simple process of 'Appreciative Inquiry' at the meeting on 28 January 2019.



**Definition:** *What did Working Group members perceive to be the ultimate aim of Education and Training Fund?*

**“communities investing in the talent of their residents”.**

The financial support for those undertaking training provided by the Fund is seen as an important part of the wider community benefit funding delivered through Burnhead Moss wind farm. The aim of the Fund is described by WG members as a way of encouraging people to undertake (largely vocational) training and improve their life chances, especially for those who have not previously accessed training and further education. Critical to the Fund is the active encouragement (through outreach) for those who previously did not consider further training or education an option for themselves, changing self-perception that educational opportunities are ‘not for me’ and increasing confidence. In other words, the Fund enables access to and unlocks opportunities for residents that they might not previously have perceived as accessible to them, for a number of reasons.

**Pauline Radcliffe consultancy services**

***What are Working Group members' aspirations for their communities?***

There was a strong feeling that the Fund should be seen as a driver for building community capacity and confidence, strengthening local communities (and services). Instilling a sense of positivity for communities experiencing challenges of isolation and low income and limited life choices is seen as an important goal in itself; demonstrating that individuals 'matter'.

**Discovery: *What works well and why does it work?***

The Fund's ***long-term*** nature (unlike many other grant sources) is seen as critical; for example, being able to confirm that the Fund will still be available for children currently in primary school when they are school-leavers. Its permanence was also seen as having potential to generate an incremental impact on the community over time and as a positive way of demonstrating 'where the windfarm community benefit goes', making a connection that might otherwise not be visible.

The Fund takes a strength-based, 'can-do' approach to ***assessing applications***, rejecting few applicants, largely only on grounds of ineligibility due to residence outwith the geographical boundaries of the scheme.

The rolling nature of the application and award process means that residents are able to take their own time in selecting the right course and completing an application form, with support offered by the Outreach Worker at various locations in the three community areas.

***Flexibility*** is a key strength, with the Working Group free to respond to training needs and local demand as these become apparent, and not restricted to renewable industry and STEM training. This is seen as particularly important in responding to the personal circumstances of residents, including a heavy reliance on public transport links (which are perceived to be poor), low income, caring responsibilities and low levels of confidence in form-filling.

The ***successful and collaborative operation of the Working Group***, supported by Foundation Scotland is seen as an important success factor, with no 'in-fighting', 'honest sharing' of ideas and nothing dismissed. This in itself has built confidence both within the group and for its members as individual members of their respective communities, working across the traditional local authority boundaries of Falkirk and West Lothian.



### Impact

WG members again emphasised the Fund has enabled *'individuals to do something they probably wouldn't have before'* due to lack of confidence, lack of knowledge of options available locally or worries about affordability. The Fund is perceived to have *'opened up opportunities that some people didn't know existed'*, particularly as a result of the Outreach Worker's proactive engagement (in terms of both support and promotion of the Fund) with individual communities and local organisations. The additional financial support offered, from subsistence to support for transport costs, to major grants towards longer vocational or academic courses was perceived to have removed financial barriers to training and education facing many of residents, due to low income, childcare costs and unemployment.

### **Examples of the impact on individuals' lives included:**

- New local business: local hairdresser has improved his skills and now opened a local salon in the village
- Local business expansion: license training for bar staff in a local pub
- Empowering a young carer to 'pursue her dreams' of furthering her career
- Supporting students to continue to further and higher education, including supporting a young woman through her medical degree
- Volunteers in the community café trained in food hygiene, first aid and Health & Safety, strengthening an important community resource
- Enabling people with childcare responsibilities to return to work and to re-train

### Dream

The Working Group was asked to consider what else could be achieved with the Fund in future and there was no lack of ambition! Discussion centred around the themes of growing impact, more responsive delivery and wider influencing/advocacy work.

### **Growing the Fund's impact over time**

There is an aspiration to see the Fund operating so successfully that it reaches capacity and begins to attract match funding from other sources to continue growing.

Enabling additional businesses and local services to set up and locate in the villages is seen as an important aspiration, which includes people moving into the area. The aspiration of setting up small business incubator units within the communities served, through provision of seed funding, was also raised.

### **Building programme delivery**

There was some discussion of the need to support better access to training, where there was an identified need. This was seen as being possible through either funding community transport to a training provider for a specific course or running a course locally through commissioning a training provider to deliver on a community premises.

Some wanted to see more young people involved in the Working Group and in managing the delivery of the Fund, particularly those who have benefitted from funding.

### **Influencing the agenda**

Working Group participants saw the success story of the Fund and its local, community-led development as a role model for other communities negotiating community benefit with windfarms. The results of the review process could be used to influence policy at Scottish level, both with Government and other funders, to demonstrate 'what works' in local communities.

### **Design and delivery: *What can we practically do to make this a reality?***

The need to provide community transport was a primary focus for discussions, with a suggestion that, where there was demand for particular commercial training courses with local provider Sibbald (such as Construction Safety Certificate), transport could be hired for those attending. Following the success of several volunteers all attending food hygiene training together (which improved uptake) at Forth Valley College, it was suggested that there was a role for bringing 'clusters' of people together to attend the same courses.

The need to approach other funders with evidence of the success of the Fund was also seen as a priority.

Hope was expressed that Slammanan might be able to form its own Community Council in order to promote the scheme more successfully, which would enable a community representative to be formally appointed (by a constituted body) to the Working Group.

Finally, the Working Group expressed the hope that the evaluation report would be presented to EDF-R and other windfarm providers and communities as an example of best practice in community engagement with sector media targeted to ensure adequate coverage.

