

Lochelbank Wind Farm Community Fund Fund Report



Years 4-6

This report covers operation of the Fund from 1st January 2015 to 31st December 2017.



Introduction

Lochelbank Wind Farm Community Fund is provided by Innogy Renewables UK Ltd, owner and operator of Lochelbank Wind Farm, located in Perthshire. It benefits the communities served by the community councils of Earn and Glenfarg.

The Fund normally makes grants of between £250 and £2,500. Applications above £2,500 will be considered where significant and wider community benefit can be demonstrated.

The Fund provides grants to support charitable activities that:

- Enhance quality of life for local residents.
- Contribute to vibrant, healthy, successful and sustainable communities.
- Promote community spirit and encourage community activity.

Requests to support a wide range of costs and activities can be considered, for such things as: equipment costs; running costs for local groups and events; staff or sessional workers costs; consultations and feasibility studies; refurbishment of community facilities, and a wide range of other costs.

Lochelbank Wind Farm Community Fund Panel makes decisions on grant awards from the Fund and on Fund strategy, and promotes the Fund locally. The Panel comprises up to six volunteer representatives, made up of one community councillor from each of the two community council areas and two representatives from the wider community in each area.

Annual donations are £20,000 (index linked) from the date the wind farm was commissioned, and will be made over the 25 years the windfarm is likely to be operational. Foundation Scotland's costs in administering the Fund are paid separately by Innogy Renewables UK Ltd.

Fund income is received in advance of the grant-making year. By Year 6 of the Fund, the annual donation for distribution had risen to £21,594.73, while Year 7 income (received in Year 6) was £22,497.92.

Total income available for distribution since the inception of the Fund up until 31 December 2017 was £150,086.85, with £129,879.56 (87%) of this awarded to local projects through a total of 73 grants. A balance of £19,952.42 remained at that date.

Financial Statement

01 January 2015 to 31 December 2017

Opening Balance		£19,163.13
Income		
Year 5 - Innogy Renewables UK Ltd	26/05/2015	£23,626.57
Year 5 - Interest Receipt	31/12/2015	£28.87
Other Income	28/04/2016	£2,390.25
Year 6 - Innogy Renewables UK Ltd	20/05/2016	£23,994.15
Year 6 - Interest Receipt	31/12/2016	£31.62
Year 7 - Innogy Renewables UK Ltd	04/08/2017	£24,747.71
Year 7 - Interest Receipt	31/12/2017	£29.63
	Sub Total	£74,848.80
Expenditure		
Grants released in period		£53,193.89
Grants to be released		£13,853.67
Year 5 - Foundation Scotland	26/05/2015	£2,147.87
Year 6 - Foundation Scotland CI	20/05/2016	£2,399.42
Year 7 - Foundation Scotland CI	04/08/2017	£2,249.79
	Sub Total	£73,844.64
Fund Expenses		
hall hire	14/10/2015	£12.00
hall hire	06/11/2015	£8.00
Catering - induction of new Panel Members	18/11/2015	£13.92
hall hire	18/11/2015	£40.00
hall hire	12/04/2016	£12.00
hall hire	09/08/2016	£32.00
Venue hire for Panel meeting April 2017	14/04/2017	£40.00
Hall hire for Panel meeting 16th August 2017	16/08/2017	£15.00
Catering etc. for induction of new Panel Members	16/08/2017	£41.95
	Sub Total	£214.87
Total funds available as at 31/12/2017		£19,952.42

Years 4-6 Overview

29 applications for funding to the main Fund (i.e. excluding micro-grants, see below) were received in the reporting period. One was rejected due to ineligibility and two were withdrawn by the applicant. 26 awards were made over 9 rounds of grant-making to 19 organisations to deliver 25 projects.

Setting aside ineligible and withdrawn applications, therefore, the conversion rate from application to award of was 100%.

The table below shows the number of awards made (and applications received) in each year.

Year	Applications/ awards
2015	10
2016	9
2017	7

A total of £67,047.56, equivalent to 98% of income received in the report period, was awarded to charitable causes. This figure includes £4,000 awarded to Community Councils for micro-grant schemes. £214.87 was used for Panel expenses, namely meeting room hire and catering.

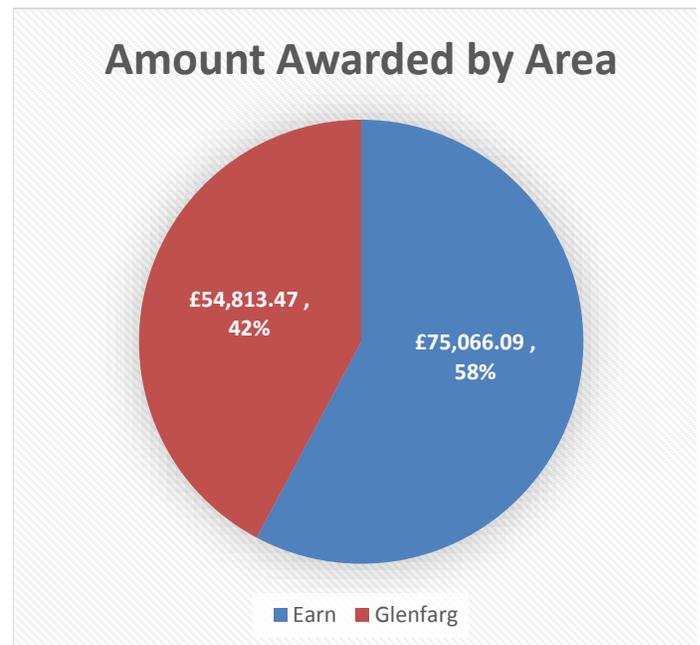
The average award made during the reporting period was £2,234.92, while over the life of the Fund to 31 December 2017 it was £1,527.99. It is possible that the size of grants sought has increased as the upper limit of awards was raised from £2,000 to £2,500 at the start of the reporting period.

The total value of projects funded in the reporting period was £250,639.63, giving a

leverage of 73% (the percentage of funding brought in from other sources to deliver those projects).

Alongside applications to the main Fund, funds are available to the two Community Councils to run their own micro-grant schemes, enabling them to offer small grants of up to £250 to individuals and un-constituted groups in their area for charitable activity. The aim is to bring about wider impact from the Fund by supporting less formal community activity. Each community council may receive up to £1,000 annually for this purpose, increased from £500 in Year 3 following discussions between Foundation Scotland and Innogy Renewables UK Ltd.

The graph below shows all funding awarded by geographical area since the Fund began.



The Fund balance at end of Year 6 was £19,952.42, and included Year 7 income. This compares with £19,163.13 at end of Year 3.

What Difference is the Fund Making?

The 30 awards made over the reporting period (including the four payments to Community Councils for onward distribution as micro-grants) were used to support a variety of activities as shown in Appendix A. These range, for example, from improvements to the local path network and outdoor sports facilities such as tennis courts and slalom canoeing to the trial of a community café in Glenfarg and a classical music engagement in Earn.

Foundation Scotland has aligned grants from the Lochelbank Wind Farm Community Fund to themes covering different aspects of community life, with associated outcomes, in an attempt to better capture and describe the impact of the community benefit monies. The predominant themes addressed by Lochelbank Wind Farm Community Fund over the three years were:

- Maximise ability to strengthen community cohesion and build social capacity;
- Transform access to, and engagement with, the environment and public spaces;
- Advance people's physical and mental health, wellbeing and safety;
- Improve life skills, education, employability and enterprise.

The percentage of funding aligned to these themes is shown in Figure 1. Little or no funding was awarded to themes such as 'reduction of isolation and disadvantage and increased access to services' or 'promotion of access to arts, culture and heritage'.

The corresponding primary outcomes (Figure 2) attributed to each grant show the Fund is achieving change in five key areas: improving community facilities (48% of funds distributed, by far the most prominent outcome); improving the quality of the local environment and public space (23%); increasing access to sport, exercise and leisure activities (12%); improving community cohesion i.e. understanding and working together (8%), increasing enterprise (4%), and promoting safer communities (3%).

Figure 1: Scotland wide impact themes aligned to Lochelbank grants made in the period 1 January 2015 – 31 December 2017

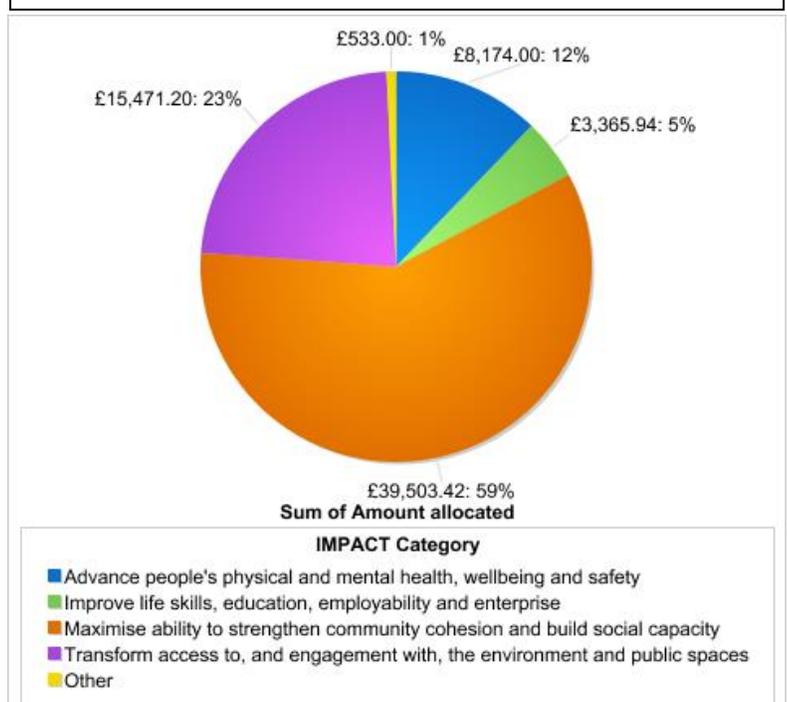
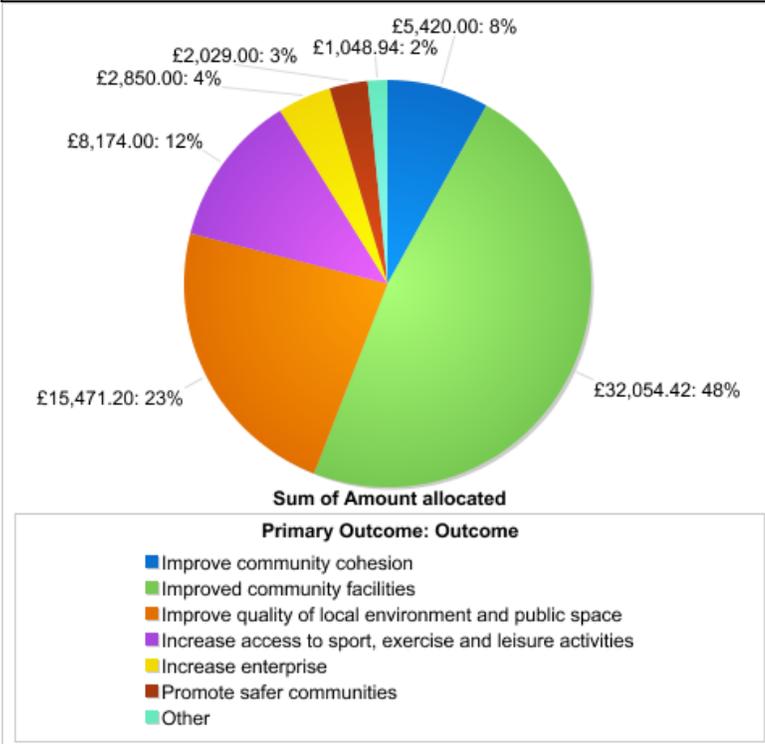


Figure 2: Outcomes attributed to Lochelbank grants made in the period 1 January 2015 – 31 December period



The following case studies provide more detailed examples of how the Fund is making a difference.

Case Study: TRACKS (The Rural Access Committee of Kinross-shire)

Background

Arngask Primary School is situated at the north end of the village of Glenfarg (population 670). As a result, many pupils historically had to walk along the busy Greenbank Road to get to school.

TRACKS (The Rural Access Committee of Kinross-shire), is a registered charity that promotes greater public enjoyment of the natural, built and cultural heritage of the Glenfarg and Kinross area. This is largely through development of access arrangements and the improvement and maintenance of a local network of paths, cycleways and bridleways. The group has



successfully upgraded or created a number of local paths, such as the Loch Leven Heritage Trail and a path from Wallace Park in Glenfarg to Duncreivie.

Project Aims and Objectives

The aim of the project was to provide a safe, traffic-free route to school for Glenfarg children, taking them off the busy road. In addition, to provide a safe route for residents in the north of the village to get to the shop in the centre of the village.

TRACKS undertook consultation with a number of local stakeholders to establish the need and design of the path. This included Arngask Primary School, the Parent Council, Glenfarg Community Council and the local authority, Perth & Kinross Council.

The route followed an existing earth path on private land, not designated as a Core Path¹ by the local authority. Prior to improvement, the site of the path had poor drainage, meaning conditions were often not suitable for walking and contributing to potential flooding risks for adjacent properties.

The project aimed to upgrade the path to create a hard, well-drained two metre wide surface with Type 1 substrate and whin dust finish. This would enable full access by foot, bicycle and horse. The path was designed to comply with Countryside Code access criteria, making it fully accessible to wheelchair users and pushchairs.

A grant of £2,029 was awarded from Lochelbank Wind Farm Community Fund in April 2016. This was conditional on TRACKS receiving written agreement from the landowner for the works, ongoing path maintenance and ongoing public access. The Fund Panel also decided that the contingency costs contained in the project budget, of £1,079, could also be paid if required.



The path before the upgrade

¹ Core Paths are routes designated under the Land Reform (Scotland) Act 2003. Local authorities have rights to maintain the Core Path network, but not a duty. Where a path is designated as a Core Path, this provides a degree of reassurance that access rights will be respected by the land owner and enforced by the access authority.

Achievements and Outcomes



The project successfully upgraded the path along the avenue running from Greenbank Road to the top of Greenbank Crescent in Glenfarg, and created a new tarmac path linking that directly into the grounds of the Arngask Primary School.

The total cost of the project was £27,560, with partnership funding coming from Sustrans and the SITA (SUEZ) Trust. The path was completed within budget; contingency funds were not required.

The project has directly benefited the 85 children at Arnask Primary School, providing an easily accessible and traffic-free route to school. In addition, it has helped the school in meeting its target of pupils taking a daily walk, contributing to improvements to health, safety and wellbeing of the pupils. Perth and Kinross Council have installed a new bike shelter and stand at the school, further encouraging active travel.

Residents to the north of the village have also benefited through a traffic free route to the local shop.

Lessons Learned

The project upgraded a path which met a clear need for a safe route to school for pupils. Consultation was carried out on the route and design to ensure that the project effectively met the needs of both the school and residents.

The project shows the value of safe, accessible paths in encouraging active travel and daily activity, hence promoting health and well-being. It also shows the added value that partnership working can bring, in particular through the bicycle shelter and stand provided by the local authority and matched funds for the tarmac link path to the school.

The route has been developed on a path which was not designated a Core Path. As a result, it was important to get written agreement for the works and for ongoing public access from the landowner. In planning the project, TRACKS also addressed the long term sustainability of the path by gaining the commitment of Glenfarg Path Group to carry out maintenance.

Many funders refuse to consider funding contingency costs. In agreeing to consider contingency costs, if required, the Fund Panel showed a flexibility which recognises the uncertainties that can arise in carrying out capital works.

Forgandenny Village Hall

Background

The village of Forgandenny lies in the Earn area, four miles south of Perth, and has a population of approximately 630. The village hall is the only meeting place in the village and is used for a wide range of activities including weekly pilates, badminton, self-defence, keep-fit, dance and amateur dramatics. A total of 70 people regularly attend these classes. The local primary school, which has 50 pupils, uses the hall regularly for services, plays and fundraising activities.



Monthly film nights attract an average of 50 people, and regular annual events, such as the Burns supper, Christmas Fayre, Halloween and New Year parties, have averaged 100 attendees. Coffee mornings, ceilidhs, quiz nights, jazz nights, Forgandenny in Flower, music recitals and a pop-up restaurant have also been well attended. It is also let for private use, such as for birthday parties or funeral teas. The hall is therefore a very important facility for the local community.

The 19th Century building is predominantly of red sandstone, and was experiencing major problems with damp. This was thought to be a result of the type mortar used when repointing the building in the past. This cement mortar had formed an impermeable layer and not allowed damp to escape. Gutters, downpipes, fascias and a stone chimney were in a poor state of repair.

Project Aims and Objectives

The aim of the hall repairs was to make the building safe and eliminate the damp problem, and hence safeguard a well-used community asset for the future.

The project was undertaken in two phases. Initially £1,000 was awarded from Lochelbank Wind Farm Community Fund for a professional survey and remedial repairs to the porch area of the building. The porch repair was used to test the effectiveness of repointing with lime mortar in resolving the damp issue.

The repairs to the porch proved successful. As a result, the hall's management committee applied for further funding to remove the old cement mortar and replace with lime mortar on the remainder of the building. This second phase also included other repairs to the fabric of the building identified as urgent in the earlier survey. These included: stabilisation of the stone chimney; repairs to guttering, fascias, downpipes and soakaways, and; installation of 'tell-tales' to monitor any movement in the walls.

Achievements and Outcomes

Repairs to the hall took longer than expected due to bad weather and the need to keep the disruption to users to a minimum. However, the fabric of the hall has now been repaired, resolving the damp issue, and making safe the potentially dangerous chimney.

A local stonemason was used to carry out the majority of the works, increasing the economic benefit of the grant funding to the local area.



With the building now in a good state of repair, the hall can continue to provide a safe and comfortable space for use by the wide range of groups and clubs as described above, into the foreseeable future. Moreover, the hall management committee can build on existing usage to make the hall more financially viable in the long-term.

Lessons Learned

Village halls can be of major importance to rural communities. They are a hub of community activity, contributing to the health, social cohesion and quality of life of the local population. However, many village halls are older buildings – bringing challenges for voluntary committees when major repairs and maintenance are required.

The Forgandenny Village Hall committee has had to deal with delays caused by weather and the practical difficulties of carrying out works while the building is in regular use. However, the project has been successfully completed, and the future of an important community asset secured.

For further information about Forgandenny Village Hall visit their Facebook page at <https://www.facebook.com/pages/category/Community/Forgandenny-Village-Hall-242591729439283/>

Marketing and Communications

Foundation Scotland, alongside Innogy Renewables UK Ltd and the Community Panel, sought raise the profile of the Fund through a variety of channels during the report period, as shown in the table below.

Activity	Date / Frequency	Coverage/ impact
Press release on awards made following each round of award making	5 th May 2015	"Sports Clubs to Benefit from the Profits of Renewable Energy" (Bridge of Earn Tennis Club – Victory Park pavilion) in Perthshire Advertiser
Press release on awards made following each round of award making	10 th May 2017	"Money Blows in with Boost to Village Hall" (Forgandenny Village Hall) in Perthshire Advertiser
Press release on Panel vacancy	Two press releases: August 2015 and June 2017	Coverage in the Perthshire Advertiser in August 2015; Coverage in the Courier in June 2017
Posters promoting the Fund deadlines	Annually	Panel members distribute in communities and in local newsletters or websites.
Summary of awards made after each Panel meeting	After each award-making Panel meeting	Sent to Community Council representatives to share via local noticeboards, newsletter and websites.
Fund webpage - https://www.foundationscotland.org.uk/programmes/lochelbank/	After each award-making Panel meeting	Up-to-date information about the Fund, including most recent grants awarded. Over the report period there were 1489 page views to the fund page of which 1025 were unique. In addition there were 164 views of case studies for Lochebank and 137 views relating to the Panel.
Social media activity – tweets, Facebook posts	After each award-making Panel meeting	Facebook posts for Fund promotions reach an average of 200 out of a possible 959 people and twitter has a reach of 3,127 followers.

Community Panel Overview

A Community Panel meets three times each year to make recommendations on awards from the Fund and advise on overall Fund strategy. The Panel is governed by a Terms of Reference that has been agreed between community representatives and Foundation Scotland, and is reviewed from time to time.

The Panel is made up of people who live in the area that the Fund benefits, and comprises a mixture of community councillors and other members of the community. One community council representative is appointed directly by each of the two community councils. Two further community representatives may be appointed from each area through an open and transparent process agreed by Foundation Scotland.

Each Panel member serves a minimum of one and a maximum of three years, with members retiring on a phased basis to ensure knowledge and expertise are retained. However, retiring Members may re-stand. Opportunities to become a Panel member are advertised through local channels and on the fund webpage (see below).

The Panel has seen a healthy level of change in membership since its inception in 2012, with turnover averaging around one member per year.

Lochelbank Wind Farm Community Fund Panel from 1 January 2015 to 31 December 2017 were as follows:

Name	Area representing
Janice Sloan	Earn (Community Council)
Stuart Donaldson	Earn (stood down March 2017)
James Thomson	Earn
Sandra Williams	Earn (appointed April 2017)
David Aird	Glenfarg (stood down May 2015)
Colin Campbell	Glenfarg (stood down Aug 2015)
Margaret Ponton	Glenfarg (Community Council) (stood down Aug 2017)
Rosemary Johnstone	Glenfarg (appointed Oct 2015)
Hazell Allan	Glenfarg (appointed Oct 2015)
Ian Pilmer	Glenfarg (Community Council) (appointed Aug 2017)

Approved minutes of Panel meetings are published on the Fund webpage at <https://www.foundationscotland.org.uk/programmes/lochelbank/>

Conclusion

With 26 eligible grant applications received over the report period and all of these awarded a grant, Innogy Renewables UK Ltd's Lochelbank Wind Farm Community Fund continues to be a valuable resource for community groups and registered charities seeking to provide and improve local facilities, services and events.

While not enshrined in any of written agreement relating to the Fund, it was agreed in discussions during the set-up of the Fund that, over the lifetime of the Fund, a broadly equal distribution of funds between the two communities would be aimed for. At the end of 2017, there was a slight skew of funding distribution towards the Earn area over Glenfarg.

Only one ineligible grant application was received during the report period. In 2017, Foundation Scotland revised the grant application form to incorporate the applicant guidance into that, with notes given alongside each question on the form. This seeks to ensure greater clarity around the information we are looking for and that the number of ineligible applications received remains low - thus avoiding disappointment for applicants.

While the number of applications received has reduced slightly over the three year reporting period, from ten in 2015 to seven in 2017, it is too early to discern whether this is a trend to be concerned about. Going into Year 7, the Fund had a balance of £19,952.42, just over one year's worth of grant making funds. This included the Year 7 payment from Innogy Renewables UK Ltd, and therefore the level of funds distributed over the reporting period was broadly in line with the amount of funds received annually. Nonetheless, the Foundation will continue work with the Community Panel going forward to monitor levels of applications and Fund expenditure and to identify any remedial action should these drop off.

Foundation Scotland

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Appendix A: Summary of Awards from 1st January 2015 to 31st December 2017

Earn (15 awards for project funding, 2 awards for micro grant scheme)

Ref.	Applicant Name	Amount Awarded	Project Cost	Leverage	Grant Summary
A358639	Bridge of Earn in Bloom	£3,100.00	£6,117.00	49%	To purchase four 6-tier self-watering planters.
A359888	Bridge of Earn Tennis Club	£5,000.00	£6,500.00	23%	To contribute to the cost of refurbishing the clubhouse toilets and storeroom.
A371202	Strathallan Canoe Club	£904.00	£3,073.82	71%	To contribute to the purchase of two slalom boats for use by beginners in the club.
A379173	Dunbarney and Forgandenny Primary School Parent Council	£515.94	£1,902.39	73%	To purchase equipment to use in a cross-curricular outdoor education programme for the students.
A394610	Earn Community Council	£1,000.00	£1,000.00	0%	To provide a fund for distribution to groups and individuals in Earn in the form of micro grants up to a maximum of £250 for general charitable purposes.
A396227	Dunbarney and Forgandenny Parish Church	£1,300.00	£1,500.00	13%	To replace the seating in the church hall.
A397177	Bridge of Earn Bowling Club	£969.95	£969.95	0%	To purchase and install 5 radiators in the clubhouse, replacing the existing storage heaters.
A397213	TRACKS (The Rural Access Committee of Kinross-shire)	£2,029.00	£27,560.00	93%	To upgrade the path along the avenue in Glenfarg running from Greenbank Road to the top of Greenbank Crescent, providing a safe traffic-free route to Arngask Primary School and the village shop.

A410997	Forgandenny Village Hall	£1,000.00	£1,000.00	0%	To fund an external survey of the building and carry out initial stonework repairs to one facade in order to establish the scale and cost of repairs needed over the whole building.
A411961	Perth Chamber Music Society	£533.00	£1,690.00	68%	To contribute to the cost of holding a community music event on 7 October 2016, including a performance of Prokofiev's "Peter and the Wolf," demonstrations of instruments and the opportunity for audience and musicians to interact.
A423888	Earn Community Council	£1,000.00	£1,000.00	0%	To provide a fund for distribution to groups and individuals in Earn in the form of micro grants up to a maximum of £250 for general charitable purposes.
A457044	Forgandenny in Flower	£2,487.00	£2,500.00	1%	To purchase gardening equipment, including shed, hand tools, hanging baskets, compost and plants and to distribute hanging baskets across the village.
A437159	Forgandenny Village Hall	£8,973.00	£12,973.00	31%	To contribute to the cost of carrying out exterior and interior repairs to the village hall.
A437342	Bridge of Earn Tennis Club	£3,364.00	£3,864.00	13%	To assist with the cost of installing concrete flooring in the changing areas of the clubhouse.
A437356	Bridge of Earn Institute	£2,360.00	£2,460.00	4%	To contribute to the cost of replacing the roof.
A437577	Brig in Bloom	£7,384.20	£51,402.00	86%	To fund drystone walling and paths for the group's 'Bridging the Past: Balmanno and Brickhall Community Garden' project.
A440256	Strathallan Canoe Club	£3,500.00	£30,220.00	88%	To contribute to the development of a canoe slalom site in Bridge of Earn.

Total awarded to Earn: **£45,420.09** (68% of funds awarded in Years 4-6).

Glenfarg (11 awards for project funding, 2 awards for micro-grant scheme)

Ref.	Applicant Name	Amount Awarded	Project Cost	Leverage	Grant Summary
A355482	Glenfarg Tennis Club	£775.00	£14,220.00	95%	To fund the costs of drainage improvements to the courts, comprising a channel and soak away with drain on Court 1 and removal of the middle section of the wall at Courts 2/3.
A359033	Glenfarg Community Council	£1,011.00	£1,011.00	0%	To replace the Glenfarg Community Council noticeboard with a larger, weatherproof and more accessible noticeboard and to relocate this to a more prominent and visible position.
A367789	Glenfarg Renewable Energy Association	£2,850.00	£59,040.00	95%	To contribute to the cost of various consultations and studies necessary to obtain planning consent to construct a community-owned wind turbine.
A371207	Glenfarg Bowling Club	£2,500.00	£2,910.00	14%	To purchase equipment to maintain and improve the quality of the bowling green.
A377541	Glenfarg Community Council	£1,000.00	£1,000.00	0%	To provide a fund for distribution in Glenfarg in the form of micro grants for individuals and groups, up to a maximum of £250 for general charitable purposes.
A378324	Abernethy and Dron and Arngask Parish Church	£1,475.00	£3,845.00	62%	To contribute to the cost of replacing two windows in the church which have become rotten.
A386374	Glenfarg and Duncreevie in Bloom	£2,500.00	£2,500.00	0%	To purchase two 3-tier planters for the area at the telephone box and larger window boxes for the school railings.

A412072	Glenfarg Tennis Club	£1,270.00	£1,970.00	36%	To purchase new nets, a yardstick for measuring net height and floodlight shades. To hire coaches in other sports to expand the group's tuition courses for schoolchildren.
A412468	Glenfarg Community Company	£409.00	£409.00	0%	To provide for sundry expenses over the next six months, including meeting room hire, travel expenses, stationery, etc.
A420669	Glenfarg Village Hall	£2,835.00	£3,000.00	5%	To carry out repairs and light refurbishment to the main hall and stage, meeting room, entrance hall, and toilets.
A449163	Glenfarg Village Hall	£2,969.47	£2,969.47	0%	To establish a "Glenfarg Lounge" in the village hall's existing meeting room by installing appropriate furniture, lighting, coffee machine, and tableware.
A458120	Glenfarg Community Council	£1,000.00	£1,000.00	0%	To provide a fund for distribution in Glenfarg in the form of micro grants for individuals and groups, up to a maximum of £250 for general charitable purposes.
A354852	Glenfarg Village Hall	£1,033.00	£1,033.00	0%	To purchase additional tables and a display board for hall use.

Total awarded to Glenfarg: **£21,627.47** (32% of funds awarded in Year 5).

Grand Totals

Amount Awarded	Total Project Costs	Leverage (% of other funds)
£67,047.56	£250,639.63	73%