

fair share



Lottery money where it's needed most



Fair Enough... learning from the Fair Share Trust in Scotland

devlinbeattie partnership

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The Headlines

£6.19 million from Fair Share Trust allocated in Scotland

Over 100 awards to 13 Scottish neighbourhoods

£4.6 million additional funding levered from other sources

Almost three quarters of funded projects are continuing beyond the life of the Fair Share Trust

60 new services, facilities or initiatives established, 30 of which have continued beyond the end of the funding

Local programmes engaged young people, raised environmental awareness, grew the voluntary sector and volunteering, increased community cohesion, established local facilities and improved wellbeing

Social capital grown through local panels and projects

35% of former local panel members are now more involved in representative structures or community groups

Life-changing impacts delivered through projects

Introduction

This report celebrates the achievements of the Fair Share Trust programme in Scotland. It is intended as a legacy report that will influence thinking about community capacity and how it can best be supported.

The Fair Share Trust (FST) programme was unique among Lottery funded programmes. It provided financial and other support for up to seven years in thirteen neighbourhoods in Scotland that had previously not had their fair share of Lottery funding.

The Fair Share Trust programme in Scotland ran from 2003 -2010 and invested £6.19 million in projects and programmes designed to build community resources and skills, and improve the environment in disadvantaged areas. Funded by The Big Lottery and managed by the Scottish Community Foundation, this flexible programme supported a wide range of projects and activities.

FST went beyond grant giving. In each neighbourhood a panel made up of people living or working in the area determined the local priorities and advised on funding. This local knowledge and involvement ensured communities maintained ownership of the FST programme in their area and produced the added benefit of building social capital, the dynamic mix of skills, knowledge and resources in a community that will sustain the impact of the programme long after the funding has been spent.

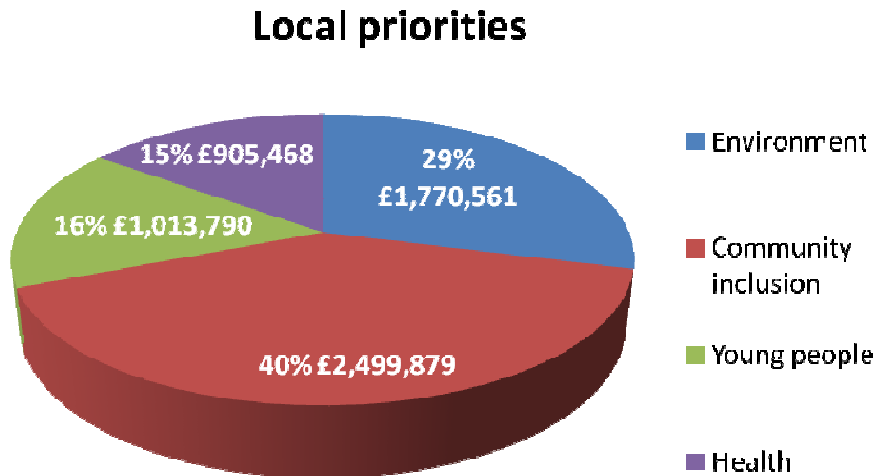
The designated Fairs Share Trust neighbourhoods in Scotland are:

Dundee	Charleston
Glasgow	Drumchapel Dumbarton Road Corridor Greater Pollok Penilee Toryglen
North Lanarkshire	Cumbernauld Brannock (inc. Holytown, New Stevenston, Newarthill & Carfin) Motherwell Abronhill
Renfrewshire	Linwood Thrushcraigs
South Ayrshire	Maybole & surrounding area
South Lanarkshire	Larkhall & surrounding area South Lanarkshire Rural Area (inc. Forth, Carstairs, Carstairs Junction & Carnwath)

The priorities in Scotland

Local priorities decided by panels in each of the 13 FST neighbourhoods reflected four themes. Figure 1 shows the priority given to each theme with the amount awarded detailed.

Figure 1



Examples of local FST projects are scattered throughout the report.

The Fair Share Trust was different

The Fair Share Trust transformed the usual approaches to grant - making and was unique for The Big Lottery which generally allocates grants on the basis of competitive programmes.

Beyond the Big Lottery, grant funders generally determine what funded programmes should achieve and expect applicants to have plans that contribute to the delivery of these achievements. Funding programmes are usually organised on a country-wide or regional level. This means that national or regional priorities are being addressed, which may not reflect all local needs or be relevant in all local areas.

This arrangement also allows those with experience of grant funding to build expertise as applicants, resulting in a cohort of individuals and groups who are skilled in what is increasingly viewed as 'the funding game'.

The Fair Share Trust turned that on its head. It was designed to overcome some of the problems associated with the usual approach to funding. Firstly, it allocated funding for an initial five year period which was followed up with a two year extension, and encouraged communities to use their own knowledge and experience of the places they lived and worked in to set their own local priorities. It then made sure that local people who might previously have had no, or very little experience of funding, were given management and development support to build the confidence and skills needed to make decisions about funding priorities. Crucially, the programme focussed on supporting local groups that might not be skilled in 'the funding game'.

The Fair Share Trust showed that Lottery funding was being targeted to disadvantaged areas at the same time as giving those communities time and support to work out how best to use the funding to make their priorities a reality.

To support this new approach to funding, The Big Lottery established the UK-wide Fair Share Trust programme through a Trust, managed and delivered by the Community Foundation Network (CFN). In Scotland the Scottish Community Foundation (SCF) became the local agent for the programme. This meant that legal responsibility for the funds lay with the Trust rather than The Big Lottery. An independent Protector was appointed to oversee the Community Foundations Network's management of the programme and, in Scotland an independent panel was established to make the final decisions on funding and oversee the management of the programme.

Case Study: Pure, Dead Brill Mentoring Project



Pure, Dead Brill Mentoring Project in Larkhall was awarded a grant of £118,842 from Fair Share Trust to train, recruit and match volunteer mentors with vulnerable young people in Larkhall who need additional support to get into work, training or learning. The project focuses on establishing what interests each young person... everything from food to motor racing. Volunteer mentors who share this interest are matched with young people and the resulting relationship is the vehicle through which confidence is built, job taster sessions are arranged and options for training and employment pursued.

The 62 young people who have been involved in the project firmly believe that their engagement with volunteer mentors is different to their involvement with other services. They respond positively to mentors whose own life experience has motivated them to take up the challenge of supporting a young person with difficult and complex lives.

Referrals from partner agencies have led to stronger connections and increased trust between organisations, with employment and college course take-up tangible measures of the project's success.

As a result of further funding from a SCF donor, the project is now being rolled out to other parts of South Lanarkshire and represents a great sustainable legacy for young people.

The Model

The Fair Share Trust model, though flexible to local circumstances, was shared across Scotland. It included:

- Development and management by the **Scottish Community Foundation**, referred to as the programme's **local agent**
- An **outcomes approach** – focusing on the intended changes within communities using a highly flexible approach about how and who delivered them
- Explicit aims of **sustaining capacity building, social capital and liveability** through a devolved model with power in the hands of a local panel, made up of people living or working in the area, to identify gaps and needs and determine what would best address them
- A focus on **strategic funding** and an emphasis on avoiding solely capital projects or small grants, aimed at projects and activities that would collectively make a sustained difference to the neighbourhood
- A strong focus on **sustainability** in every sense
- **The Scotland Panel**, which was set up to have detailed oversight of the Fair Share Trust. It was chaired by a trustee of the Scottish Community Foundation with other external volunteers appointed to it. Final funding decisions were taken by the Scotland Panel
- Negotiation with **local authorities** to identify the 13 Fair Share Trust neighbourhoods, those which had received the least from Lottery funding and would benefit the greatest from the Fair Share Trust programme
- **Local panels**, made up of people living or working in each of the 13 Fair Share Trust neighbourhoods, who came together over the length of the programme to identify their neighbourhood priorities and advise on which projects and activities should be funded

- A focus on **community capacity building** in each neighbourhood which included:
 - Growing local involvement
 - Growing volunteers
 - Growing local facilities
 - Growing local organisations
 - Growing individuals
 - Growing health equality
 - Growing young people
 - Growing community cohesion
 - Growing the local voluntary sector
 - Growing environmental awareness

- **Allocation of Fair Share Trust funding**, an expendable endowment, to each neighbourhood, with a known dedicated allocation to each, for the length of the programme

- SCF and CFN's **commitment to learning** from the programme; about what works in community empowerment and capacity building and what models of grant giving best support communities

The Strategic Fit

The Fair Share Trust programme has reflected a number of policy and strategic drivers that recognise the contribution of civil society to achieving a more successful Scotland. These include:

- **Scottish Government National Performance Framework**, detailing fifteen outcomes that the Government wants to achieve in Scotland, including '**strong, resilient and supportive communities**'
- Joint **Scottish Government and COSLA Community Empowerment Action Plan**, outlining the government's commitment to community empowerment including expectations of community planning partnerships and a commitment to extending community ownership of assets
- Scottish Government commitment to establishing **Third Sector Interfaces** as essential partners in community planning partnerships
- Establishment of, and 2010 Scottish Budget announcement of the extension of, the **Scottish Investment Fund**, established to build the capacity of third sector organisations to contribute to the fifteen national outcomes
- **Scotland Rural Development Programme 2007 – 2013**, including the LEADER funding stream of £38 million aimed at building sustainable rural communities, including funding community led rural development
- **The Big Lottery** policy commitment to public involvement and community empowerment, reinforced in its 2009 public consultation exercise, *Big Thinking*, including a continued commitment to supporting communities to take ownership of local assets
- Scotland's **National Standards for Community Engagement** provide a framework against which to measure practice designed to better engage communities in the issues and decisions that affect their community of place or people

- **Single Outcome Agreements** (SOA), detailing the local outcomes and priorities of each council and their community planning partners, their fit with the national outcomes and the planned financial allocation to priorities
- The (then Scottish Executive's) **Working and Learning Together to Build Stronger Communities** (WALT) guidance. This identifies 'achievement through building community capacity' as one of the three national priorities for the community learning and development sector. It describes the process as 'building community capacity and influence by enabling individuals, groups and communities to develop the confidence, understanding and skills required to influence decision making and service delivery'
- The role of the community learning and development sector in promoting community capacity is highlighted in the **HMIE inspection framework** HGIOCLD?2 (How Good is our Community Learning and Development?2), particularly relating to the impact of community learning and development on local communities

At UK level, the **Coalition Government's Big Society** was its first major policy announcement. A programme that covers a wide range of issues, key features include:

- Giving communities more powers
- Encouraging people to take an active role in their communities
- Transferring power from central to local government
- Supporting co-ops, mutuals, charities and social enterprises

Whilst The Big Society is not Scottish Government policy, connections are being made between the Scottish Government's policy commitment to community empowerment and third sector investment with the Big Society agenda.

With its focus on outcomes, devolved decision - making to local communities through local panels, flexibility about how grants were allocated including commissioning organisations to deliver local priorities detailed in Local Priorities Documents, promoting community ownership of assets and supporting sustainable change through funding, the Fair Share Trust mirrored the principles and practice standards contained within these key policy drivers.

The Fair Share Trust acted as an effective microcosm of the Scottish Government's concordat with local authorities, which gave greater flexibility to local authorities about how they allocated central government funding to support local priorities within the National Performance Framework. The programme anticipated the shift towards outcome focussed planning, worked with local authorities to identify priority areas, established local panels and a devolved mechanism to set local priorities based on what they knew about needs and gaps, allocated a fixed amount of flexible funding to each local area, supported local panels to identify how best to achieve their outcomes and negotiated the development and delivery of outcome focussed projects with local organisations.

The flexibility of the support and funding offered by the programme extended to developing projects 'from scratch' through to independence and allocating multiple grants to organisations which needed additional financial support to become sustainable.

The Highlights

Independent evaluations and case studies compiled by the Scottish Community Foundation on the Fair Share Trust programme in Scotland have identified positive outcomes for individuals, groups and communities.

Highlights for Individuals

Positive outcomes for individuals include:

- Increased confidence and self-esteem, demonstrated in local panel participation and performance
- Increased levels of participation in community organisations, including participation in community planning structures and processes

Additional outcomes for project beneficiaries include:

- Improved awareness of technology
- Improved health and well being
- Increased participation in lifelong learning opportunities
- Increased skills, transferable to learning, employment and entrepreneurship
- Increased awareness of bio-diversity and environmental issues

Bill's story

Bill was particularly interested in the history of his village so when the Fair Share Trust panel was being established to cover a neighbourhood that included his village, he was keen to make sure his own village's interests were represented. Having had little previous experience of grant-making, Bill was unsure of the value of his contribution to the panel but by the end of the programme was so convinced of the positive impact it had on his, and other local villages, he made the choice to become actively involved in broader planning and decision-making structures and processes established under the umbrella of the community planning partnership. Bill has taken the lessons learned from the Fair Share Trust programme into the community planning process and continues to support community development activity in his village. His focus is now firmly on the future of his village as well as its past.

Highlights for community organisations and groups

Positive outcomes for community organisations and groups include:

- Improved information and advice about funding, drawing on the knowledge within SCF and local partners of local and national funding sources
- Increased organisational skills, developed through the panel process and project delivery
- Improved management structures, delivered through effective capacity building work
- Improved governance, including increased financial transparency developed through the life of the programme
- Increased knowledge and awareness of service planning and delivery, evidenced in the delivery of projects and planning for organisational sustainability
- Improved joint working, including across and between organisations and communities previously in competition with each other
- Movement towards greater sustainability, evidenced by structural change including mergers

The local panels performed as **investors in their communities**. Using the funding available to their local area flexibly, they provided development or feasibility funding ahead of full project funding and called on additional support from SCF staff or other services when specialist input was needed at the start-up and critical times of projects' development. The panels recognised that local groups needed flexibility in how grants were used and agreed to fund activities later in a project's life to ensure the delivery of outcomes or help build sustainability. Dialogue between local panels and projects contributed to the delivery of positive outcomes and helped build the social capital so critical to the performance of panels.

Highlights for communities

Positive outcomes for communities include:

- Increased social capital, the dynamic mix of knowledge, skills and resources that build community resilience
- Community cohesion, built through the work of local panels and projects that brought people with shared priorities together
- Increased service provision, 60 new services established, 30 of which continue

- Increased volunteering opportunities, offered through projects, panels and wider local structures and processes
- Increased employment opportunities, within local projects, through sustainable developments and through increased employability skills
- Increased choice of leisure, learning and development opportunities, delivered directly through projects, panels' partner networks

'We've learnt so much about how the Planning system works –and we've made use of all of it!' - *The Signage Project, South Lanarkshire Rural Areas*

At the programme outset, ALVO, the lead local agency for programme delivery in the **South Lanarkshire Rural Areas** neighbourhood set what seemed a very ambitious target of bringing in £1 million of new funding to the area. It exceeded this target bringing in a total of £1,484,574 from 41 different funders for investment in the four villages making up the Fair Share Trust neighbourhood.

This investment represents more than just money into the villages. The four villages have a long history of parochialism and competition for limited resources available for community activity. With a local panel made up of representatives from all four villages recommending how funding should be allocated, long established barriers began to come down and a tangible sense of community cohesion prevailed.

This new cohesion is symbolised by the work of the Signage Project resulting in a large colourful sign erected at the gateway to the area designed to highlight local attractions to both visitors and locals alike. All four villages including children and young people were involved in planning and designing the sign...a tangible legacy of Fair Share and of the new cohesion enjoyed by villagers.

Case Study: ASCEND

ASCEND's aim initially was to develop the community transport service across the **Greater Pollok** area of Glasgow, generate income to help sustain the service and deliver Mini Bus Driver Awareness Scheme (MIDAS) and Passenger Assistance



Training Scheme (PATs) training to volunteer drivers. In addition, the project provided a brokerage service for local community groups' minibuses throughout the Greater Pollok area.

With **3 Fair Share Trust grants totalling £99,893** the project provided a full service approach to the people resident within the South West of Glasgow with a door-to-door service to meet individual travel needs and group travel services. The emphasis was to develop an affordable and sustainable Community Transport Service for local organisations and the community of Greater Pollok and South West Glasgow. It enabled people to get to and from their destination at unsocial times and hours. It also aimed to tackle social exclusion more generally by improving access to learning, healthcare, hospitals, shops and social, cultural and sporting activities for its members.

The project aimed to continue delivering a community transport service in the area beyond the original funding period and as such the project has now become an organisation in its own right called South West Community Transport (SWCT). SWCT have been successful in generating an income from group hire, membership fees and training activities. By working in partnership with Community Transport Glasgow, they have attracted contracts from the Community Health and Care Partnerships, and delivered services for Education Glasgow City Council and Culture & Sport Glasgow.

What made the Fair Share Trust programme a success?

The Fair Share Trust model

The features of the programme model that contributed to its success include an outcome-focussed programme, Scottish Community Foundation staff allocated to each area using a community development approach to support programme delivery, needs and gaps identified at community level and funding dedicated to local areas for the long term with flexibility about how it could be allocated.

Once agreed, priorities expressed in the Local Priorities Documents were immune to subsequent change as a result of policy/political changes and the funding allocated to each local area was not subject to annual targets or clawback. These were important features that demonstrated the Trust's commitment to localism. This commitment was strengthened by the strategic approach to funding which included commissioning and soliciting organisations to deliver against agreed local priorities.

Local Panels

The joint Scottish Government and COSLA Community Empowerment Action Plan states its commitment to developing local leadership and that this needs to be combined with widening involvement and participatory processes. It acknowledges the range of community structures that provide the focus or 'anchor' for community led action and are key to 'developing relationships between government and communities across the country'.¹

Responses to the Big Lottery's 2009 UK consultation, *Big Thinking*, highlighted the value of devolved decision-making at a very local level in grant giving. Local panels were assessed as being particularly useful in matching need to grant giving and in measuring the progress and impact of grant giving at a local level.

Fair Share Trust panels were a tangible example of devolved decision-making. More than this they were a mechanism for building social capital. They acted as platforms through which local stakeholders connected and built productive relationships, explored wider issues than the projects being funded by Fair Share and created linkages between services, projects and community organisations that will thrive beyond the life of the Fair Share Trust; an example of localism in action.

¹ Scottish Government and COSLA Community Empowerment Action Plan, 2009

Local panels also faced challenges. Agreeing local priorities, maintaining consistent membership for the length of the programme, overcoming historical parochialism in communities and shelving the personal priorities of panel members to ensure the best use of funds, were real issues the panels faced.

Strategies to overcome these challenges were as varied as the challenges themselves. This included the establishment of virtual panels, where SCF co-ordinated panel discussions and decisions by email.

Although the panels have now disbanded, a SCF survey established that 35% of former panel members report that they are now more involved in local groups and representative structures as a result of their involvement with the Fair Share Trust.

Scotland panel

The value of the Scotland panel as an independent body overseeing grant allocation cannot be underestimated. Given the challenges some local panels faced, the Scotland panel played an important role in making final decisions about funding allocation, adding value to the programme especially in the exceptional cases where it took responsibility for decisions where these were contentious or divisive within local panels.

The independence of SCF

As the local agents for the Fair Share Trust, SCF's role and performance was critical to the programme's success. Chairing and facilitating local panels with a focus on supporting local autonomy and devolved responsibility, managing conflicts of interest, absorbing issues raised about local programmes by the Scotland panel and keeping the focus on responding to Local Priorities Documents were all critical roles that were performed professionally and effectively by SCF personnel.

Once local panels were set up, SCF continued to develop members' skills and confidence to the point where panels began to question earlier decisions they had made, including funding decisions, and moved towards a more strategic approach to decision-making.

SCF's knowledge of donors' interests has established relationships between local projects and donors that have resulted in longer term funding being secured for valued projects.

Leverage

Having seven years funding allocated to a neighbourhood acted as a mechanism through which to attract further funding from a variety of sources. £4.6 million additional funding was attracted using Fair Share Trust funding as a lever.

The South Lanarkshire Rural Areas neighbourhood exceeded its ambition to lever a further £1 million on top of the Fair Share Trust funds by over £400,000. This was made possible by the Fair Share Trust investment in the neighbourhood and represents a continuation of investment beyond the life of Fair Share.

Community empowerment

The Fair Share Trust demonstrated localism in practice; it evidenced that local people adequately resourced and with a clear remit, is a workable model for project planning and resource allocation.

Whilst this has been challenging for panels, they have been effective in maintaining a clear focus on local priorities and identifying projects for funding support. At times panels took the decision not to recommend projects because they did not clearly fit the local priorities despite personal or organisational connections with applicants.

Panel members reported a high level of learning from their participation on local panels which they will carry forward to new networks, organisations and projects.

Learning from the Programme

Scottish Community Foundation and **Community Foundation Network** set out to learn from the Fair Share Trust programme. The most significant areas of learning are about:

- Outcome- focussed approaches
- Capacity building
- Localism

Outcome- focussed approaches

The focus on delivering sustainable outcomes in communities proved to be an effective approach but one that also stretched the role of stakeholders involved. No longer just a grant-making process, this strategic approach proved to be resource intensive with pro-active work involved in both identifying needs and gaps and negotiating with local organisations how best they could be addressed. This included commissioning work, soliciting funding applications from appropriate organisations as well as capacity building with those community organisations whose ambitions to deliver change were not necessarily matched with their capacity.

The positive impact of this more intensive engagement with community organisations included more informed, better planned and improved decisions on grant funding and the development of robust systems to support grants programmes e.g. Appropriate and proportionate monitoring and evaluation mechanisms.

The Fair Share Trust helped embed a culture of change from a competitive grant environment towards collaborative outcome-focussed work with communities. Lessons learned through the programme will support more strategic approaches and performance in new and developing programmes beyond the Fair Share Trust areas.

Capacity building

Strengthening the ability of communities to identify needs, participate in decision making and ultimately control services that deliver positive change in communities takes time. With capacity building at the heart of key policy drivers in Scotland including community planning, the Fair Share Trust demonstrated the value of a long term approach to engaging, involving and supporting local people to take responsibility for improving their

communities. The learning gained from a long term panel commitment, examples of individual, organisational and community capacity are evident throughout the programme.

The programme has made it clear that there is no 'one size fits all' approach to building capacity but that investing time in communities and using community development skills to support them to identify and work on their agenda and the priorities that matter most to them, results in increased community involvement and ownership of programmes.

The panels were the crucial capacity building mechanism within the programme. At their best, they took risks to build capacity and cohesion across their areas, acted as positive models within communities and demonstrated the value of communities working together.

Localism

The Fair Share Trust intended to give local panels the power to make real changes to local conditions. SCF's challenge was to support the delivery of this outcome whilst ensuring grant funding was allocated strategically and monitored against local priorities which should reflect the overall programme priorities.

In communities that had previously missed out on their fair share of grant funding, the programme played a critical role in bringing together key stakeholders with a shared interest in delivering positive change. This does not mean that there was always agreement about who had a 'right' to be involved in panels. A challenging process, SCF staff learned to ensure that decisions, though sometimes unpopular and not reflective of historical community arrangements, were transparent and that panel decisions were open to local scrutiny.

Knowing who key local stakeholders were, bringing them together to share expectations and clarify programme aims and boundaries is a key learning area for all stakeholders involved in the programme. The areas that had the most community input led to the most successful grants; those that delivered sustainable change in communities. Those areas where public sector representatives used their knowledge and expertise to actively support local panels also demonstrated success.

The value of engaging with the range of community interests in an area, promoting dialogue between funded projects and panels and being the first programme to 'discover'

some active community groups resulted in increased social capital for all involved; increased knowledge and awareness of community action and activity, better connections between organisations, improved conditions to promote working together and added value delivered through shared training and development.

SCF has built on its experience of supporting communities to manage independent funds over the long term and has adapted the panel approach to a new but growing area of its work helping communities to manage community benefit funds associated with renewable energy developments such as wind farms. In 2010 -2011 it expects to help 12 communities allocate a total of £700,000 from these sources.

The Foundation is also keen to continue to help local people develop the skills and connections to bring about change within their communities and has secured a £380,000 Big Lottery Fund grant to provide mentoring support and resources to emerging groups that aim to influence decisions about their future. Through the **Our Community Our Future** programme SCF will work with 8 communities between 2010 and 2013.