

CARES CASE STUDY



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EDF RENEWABLES BURNHEAD MOSS EDUCATION AND TRAINING FUND

COMMUNITIES INVESTING IN THE TALENT OF THEIR RESIDENTS

Fund name: Burnhead Moss Education and Training (BMET) Fund

Fund donor: EDF Renewables

Related renewable energy scheme: Burnhead Moss Wind Farm

Technology: Onshore wind

Annual fund value (per MW installed): £5,000 (index linked), of which 20% is ring fenced for the Education and Training Fund

Annual fund value: c. £130,000 (index linked) for the lifetime of the wind farm, of which 20% is ringfenced for the Education and Training Fund



Year of fund commencement: 2016

Fund area of benefit: Community council areas of Avonbridge and Standburn, and Limerigg and Slamannan in Falkirk, plus Blackridge in West Lothian

Current fund administrator: Foundation Scotland

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BACKGROUND

The decline of coal mining and heavy industry across the Avonbridge and Standburn, Limerigg and Slamannan, and Blackridge communities has left challenging economic and social circumstances and significant untapped potential amongst their 5,000 residents. Levels of working age benefit claimants and of child poverty are higher than the Scottish average and the level of home ownership lower than average. With few major employers in the areas, residents often need to commute to work and training opportunities, but with low levels of private car ownership and limited public transport, many are unable to access such opportunities that are any distance away. This, alongside insufficient household finances to cover most training and educational costs, has left a legacy of unemployment, under-employment and high risk of local residents having to drop out from jobs or educational courses.

The Burnhead Moss Education and Training (BMET) Fund was established to increase residents' chances for economic and personal development where they have decided to pursue further qualifications, be that long or short-term courses in further education, vocational training or higher education.

The BMET Fund was designed by a working group (see fund arrangements, below) comprising local residents from all three areas, supported by independent charity Foundation Scotland. In doing so, the group was required to consider the corporate priorities of the fund donor, EDF Renewables.

It was agreed that the fund would support education and training activity linked to the following sectors, on a scale of reducing priority but with an emphasis on vocational training, and ideally delivered by local providers:

- **Priority 1:** Renewables and energy industry related.
- **Priority 2:** Engineering, construction and related trades, health and safety, and STEM (Science, Technology, Engineering, Mathematics and Digital).
- **Priority 3:** Other industries which will benefit local employment in the area, including childcare, forestry, plumbing, joinery, electrician, haulage and agriculture. Also, generic courses that enhance employability such as rural development, environmental conservation, estates management, aquaculture/fisheries management, equestrian, other land-based industries, food and drink, health and social care, creative industries, life sciences, finance and business services.
- **Priority 4:** Other education courses.

The working group was keen that the fund supported short-term vocational training opportunities alongside any longer-term academic courses. The group was also keen that the fund was designed to be accessible to the whole population, irrespective of age and gender and that it was responsive to people who were unemployed or in precarious, short-term employment. It also wanted the fund to appeal to anyone keen to re-train.

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Funding can be used to pay for course fees, travel or equipment required to participate in the course, and the working group has over time established some policies covering what can be awarded for these elements under short and long-term courses.

It was agreed that applicants would not be means tested as part of the assessment of their application. Given levels of deprivation and rurality, and low levels of opportunity or take up of education in much of the area, it was felt fair that the fund incentivise greater participation in education and training for the benefit of both the individual and their wider community.

FUND ARRANGEMENTS

Foundation Scotland was appointed by EDF Renewables to set up and administer the fund. Separate sub-funds were established for each of the three areas as part of the overall community benefit fund linked to the wind farm, with local governance arrangements appropriate to each. However, EDF Renewables and local stakeholders were also interested to explore the idea of an Education and Training Fund that offered support across all three areas enabling local residents to pursue vocational training courses and further/higher education.

Foundation Scotland convened discussions between the community councils, other local groups and EDF Renewables to agree the optimum fund arrangements. This resulted in the establishment of a working group with representatives from each of the three areas

whose role was to advise Foundation Scotland on the design and delivery of the fund to ensure it was fit for purpose in line with local needs and opportunities. One fifth (20%) of the overall annual community benefit fund linked to the Burnhead Moss Wind Farm was ring-fenced for the Education and Training Fund.

The working group played an active role in fund set up, providing strategic direction, guiding the setting of initial parameters or criteria for how the fund would operate, determining the approach to marketing the fund in the area and design of materials. The group made an early decision that it would not be appropriate for them or other locally based individuals or agencies to be involved in decision making about applications from local residents, and mandated Foundation Scotland, as an independent body, to make such decisions on their behalf.

The working group also knew that some residents required additional support to consider employability and training options, and indeed to make applications to the fund for support. It was therefore agreed that an outreach worker was needed, to identify individuals in need of support, help them understand their employability needs, match these to training or education courses and assist them in applying to the fund for financial support. Despite discussions with several third sector agencies, no appropriate local host organisation emerged. A suitable local resident was however identified for the role, and in the end was contracted on a freelance basis by Foundation Scotland on behalf of the working group.

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The outreach service was initially trialled in one of the three communities over a six-month period, using monies from the Burnhead Moss local area sub-fund. The service was then rolled out across the other two areas from October 2018, initially with monies from another Burnhead Moss area sub-fund. The working group subsequently decided to commit funds from the BMET Fund to support the service on an ongoing basis across all three areas.

In 2018 and 2019, rapid growth in demand for individual grants combined with the support provided by the outreach worker resulted in the BMET Fund allocating all of its available funds, including underspends accumulated during the set-up period. On several occasions during this time, the working group members committed additional funds from their respective area sub-funds into the BMET Fund pot to meet demand.

The working group and Foundation Scotland commissioned an independent evaluation of the fund which reported back in mid-2019. This brought clear evidence of the impact and effectiveness of the BMET Fund and, following an upsurge in awards for multi-year courses, implying increased future year commitments, in December 2019 the working group collectively agreed to take a more strategic funding approach. Based on likely award levels and outreach costs in 2020, working group members agreed to commit additional funds up-front from each of their three respective area sub-funds into the BMET Fund, proportionate to the historic value of awards made to residents of each of their respective areas. It was also agreed that this would be looked at annually.

KEY OUTCOMES AND ACHIEVEMENTS

Between April 2016 to June 2020, 237 grants totalling £216,000 were awarded to 174 individuals to take part in a wide variety of educational and training courses. This equates to 3.6% of the population within the area served by the BMET Fund.

The independent evaluation produced in 2019 revealed that a quarter of participants were unemployed, with others under-employed, low-waged, under-skilled or in fragile employment and ill-equipped to deal with any potential job loss.

Calendar Year of award	2016	2017	2018	2019	2020 (to June)	TOTAL
£ awarded	£11,100	£53,511	£47,933	£76,013	£27,378	£215,935
No. of awards	8	48	61	101	19	237

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A significant proportion had not previously considered embarking upon training, whilst others were at risk of dropping out of courses, facing financial challenges and/or unable to fully participate in the training opportunities. Underlying issues included a lack of (recognised) qualifications, and/or a lack of confidence that further training or education was possible for them. This illustrates that the fund was well targeted at the intended beneficiaries.

Funds were awarded for training and educational courses across multiple sectors (see table below, from evaluation data for the period 2016-2018), with an equal split between support for shorter courses (under one year) and courses lasting a year or longer.

The independent evaluation report highlighted immediate benefits in terms of overcoming barriers to take-up and participation in training, resulting in long-term outcomes which varied according to individuals' needs and initial circumstances.

Course type	No. and value of Awards	
Renewables and energy-related	1	£1,500
Engineering, construction, health and safety, other STEM related	12	£15,920
Industries benefitting local employment: forestry, plumbing, electrician, other trades, haulage, agriculture, accountancy, hairdressing	29	£37,264
Childcare, health and social care	20	£26,620
Generic courses that enhance employability; e.g. elementary food hygiene, first aid	47	£12,711
Other courses	20	£27,045
TOTAL	129	£121,060

Source: "An Evaluation of The Pilot Phase of The EDF Renewables Burnhead Moss Education and Training Fund, 2016-2019", Pauline Radcliffe consultancy services, April 2019.

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CHALLENGES

Labour market

- Unemployment
- Under-employment
- Low-waged
- Low/under-skilled
- Fragile employment

Financial

- Unable to afford
- Drop-out risk
- Under-participation in course

Other

- Under-developed aspiration/confidence
- Social isolation
- Lack of access to transport



IMMEDIATE BENEFITS

(short-term outcomes)

Employability

- Course offers taken-up
- CVs developed
- Continuous professional development

Improved participation levels

- Reduced anxiety
- Increased accessibility
- Reduced risk of drop-out
- Maximised participation in course content and extra-curricular

Core skills and capacity

- Increased optimism and aspiration
- Time management and routine skills developed



IMPACT

(long-term outcomes)

Employability and job readiness

- Entered employment
- Career progression
- Further training/education
- Vocational qualifications
- Work experience
- Increased labour market resilience

Skills and capacity

- Increased optimism and aspiration
- Core skills
- Money management

Financial

- Increased income
- Not had to take on debt

Other

- Equipment for further study/jobs

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The outreach role has continued to evolve, establishing a regular cycle of drop-in sessions alongside one-to-one coaching and telephone support, increasingly taking on localised fund promotion including via social media, and also tracking participants' progress and achievements. The outreach worker has gradually built up a directory of locally available opportunities and built connections where possible to broker access to these relevant to individual's circumstances. This has typically included brokering access to other funding available to support individuals and support from other third sector providers, colleges and public sector employability services. The worker has also commissioned a small number of single or two-day courses where a cluster of individuals have identified a similar training need.

The BMET Fund has therefore directly enabled the creation of one part-time post already (on a self-employed basis), which has then increased reach and volumes of individuals benefiting. The outreach worker has improved the quality of support and range of opportunities available to individuals, by brokering access to other sources of financial support, cataloguing and arranging training opportunities, and supporting logistical arrangements between candidates and training providers.

In a context with limited local organisational capacity initially, the process of establishing the BMET Fund has generated a more confident and capable working group, and enabled collaborative working across the three communities. The spirit of co-operation is evidenced by the fact that the three area areas have collectively allocated over £114,000 from their respective local sub-funds into the BMET Fund.

LESSONS LEARNED

Working collaboratively

The BMET Fund has been developed and designed by the communities, with the support of Foundation Scotland, in a way that represents a new approach to the administration of training funds provided by EDF Renewables. The approach has since been used as a blueprint for community benefits linked to three other windfarms operated by the company.

Responding to local context – individual grants and outreach worker role

In a context where few community groups or organisations existed, the establishment of a grant scheme supporting individual residents, and the creation of an outreach worker post to better reach residents, has enabled the fund to reach deeper into communities and to be accessed by those most in need. Aspects of this approach have already been replicated in other localities.

Responding to local context – nuanced approaches

The outreach worker, Foundation Scotland and working group have collaboratively flexed and refined application materials, administrative processes and practical steps to better support individuals and their participation in courses. Details such as application processing timeframes, payment scheduling, awarding of funds to individuals versus training providers, and the communication channels used to liaise with applicants/awardees have all been critically important in adjusting to individual situations and ensuring the fund works for them.

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In the future, the above stakeholders will continue to review eligibility criteria, fund size, parameters on number/types of grant per individual and localised targeting to optimise the impact of available funding.

Rewards and risks of local recruitment

The opportunity to recruit a local resident familiar with the area's context has proven beneficial in marketing the fund effectively and reaching individuals via drop-ins, word-of-mouth and one-to-one support. Her visibility and credibility as a local resident and champion of community activity has encouraged engagement with other residents who might otherwise have been reluctant to do so. The potential risks of conflicts of interest (or perceptions of such) have not arisen in this circumstance due in part to the particular individual's approach and sensitivity to these risks, but these must be explored when considering the appropriateness of local recruitment to such a role.

In the absence of a local host organisation, Foundation Scotland has taken on the role of supporting the outreach worker post. Foundation Scotland was usefully able to flex its role in this way, beyond that of funder alone. In the longer-term, however, consideration will need to be given to the most appropriate arrangements for hosting outreach capability in a manner that further embeds the role within the area.

Evolving the outreach worker role beyond fund-specific support

The outreach worker role has evolved beyond simply supporting individuals to consider their employability needs and apply for funding from the BMET Fund. It is evident that balancing detailed local knowledge and fund activity with awareness of wider services and support is particularly effective in enabling individuals to realise their potential.

Data collation and impact monitoring

Foundation Scotland and the outreach worker together developed systems to track data on individuals and their progression, while being sensitive to data protection issues. Commissioning an external evaluation yielded valuable qualitative and quantitative data to illustrate fund impact. Further attention will be paid to systematically (but proportionately) tracking the impacts, from short to long-term, experienced by individual grant recipients.

"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 than traditional arrangements." – Asset Manager, EDF Renewables

"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

"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, previously unemployed for more than a year

"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." – Fund beneficiary

[Read more on the Foundation Scotland website.](#)

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