

Scottish Veterans Fund

Recognising the Contribution

APPLICATION GUIDANCE 2018/2019

INTRODUCTION

1. The Scottish Veterans Fund (SVF) was established by the Scottish Government to assist groups and organisations that provide support to Scotland's ex-Service personnel and their families. The Scottish Government has a strong commitment to support veterans and their families to achieve a successful transition to civilian life, and aims to make Scotland the most attractive place to be for those leaving Service life. In February 2016, the Scottish Government published "*Renewing Our Commitments*" reaffirming support and setting out future priorities for action. The SVF is intended to offer funding options for projects that support those priorities.

2. From 2017, Standard Life Aberdeen has made a three-year contribution to the SVF, consistent with its commitment to the Armed Forces community as a signatory of the Armed Forces Covenant. This strand of funding is dedicated to projects designed to support employment, and successful applicants can benefit from guidance from Standard Life Aberdeen to maximise the social impact of the project.

3. The SVF is administered in collaboration with Veterans Scotland who handle receipt of applications and distribution of funds. Decisions are made by Scottish Ministers, based on assessments and recommendations made by the SVF panel, which will be selected and chaired by the Scottish Veterans Commissioner.

4. The SVF is aimed especially at projects that are attempting to deliver a new or innovative approach to veterans' issues, or that seek to develop areas and activities not currently funded by either the Scottish Government or the Ministry of Defence. The benefit the project brings to ex-Service personnel and their families will be the primary measure of its value, not the scale of the project.

GENERAL PRINCIPLES ON BENEFICIARIES

5. Veterans resident in Scotland are the intended beneficiaries of this SVF and the panel's assessments will consider how well the application meets the criteria outlined below and in its enduring value to veterans. The Scottish Government applies the existing Ministry of Defence definition of veteran which is:

Any person who has served for any length of time in the Armed Forces of the United Kingdom of Great Britain and Northern Ireland (whether Regular or Reserve, including National Servicemen). The veterans' community also includes their widows/widowers and spouses and dependants. Exceptionally, this definition also includes former members of the Merchant Navy who took part in legally defined UK military operations.

6. The Scottish Government recognises that, in many cases, veterans' spouses, partners and families provide valuable support to aid veterans' transition. Projects that help meet these wider family needs are therefore welcomed, on the proviso that the benefit to the veteran remains a core objective.

7. Projects to assist serving personnel are not eligible, unless very strong evidence is made on benefits for transition and on why the need is not met by Ministry of Defence's obligations to personnel.

ESSENTIAL ELIGIBILITY CRITERIA

Legal Person

8. Applicant organisations must constitute a “legal person”, meaning it is legally constituted and can enter into a contract in its own right. For example, in respect of the organisations that typically apply to the SVF, applicants may be a Scottish Charitable Incorporated Organisation (SCIO), a new legal form for registered Scottish charities, or a registered company. Registered company applicants (whether a limited company or a company limited by guarantee) will typically be not-for-profit and may also have separate charitable status as a registered charity. Statutory bodies are also eligible to apply.

9. Please note that unincorporated organisations, even where a registered charity, are not eligible to apply. In that event, the Scottish Government recommends that consideration is given to becoming a SCIO or registered company to apply in future.

Presence in Scotland

10. Organisations applying for funding must have a presence in Scotland. Alternatively, applications submitted by a partnership must include a lead organisation based within Scotland. For the purposes of this Fund, ‘a presence in Scotland’ means that the applicant must comply with one of the following:

- (a) be a Scottish Charitable Incorporated Organisation (“SCIO”); or
- (b) be a Company registered (under the Companies Act 2006) with their Head Office in Scotland; or
- (c) be a charity registered in Scotland (under the Charities and Trustee Investment (Scotland) Act 2005); or
- (d) occupy offices or premises in Scotland provided these will be used in connection with the use or administration of funds paid to organisation through this Fund.

11. Applications submitted by a partnership must include a lead organisation based within Scotland. There must be a named Project Manager in Scotland who can discuss progress of the project with grant providers, as and when required. It will be the Scottish-based applicant organisation who will enter into the grant contract and have overall responsibility for delivery, including management of the budget.

BUDGET

12. The Fund consists of two strands:

- **Strand I: General Support.** Last year (year 1 – 2017/18) the general support strand consisted of £120,000 per annum for three years (£360,000 in total), funded by the Scottish Government. The aim of the strand this year (year 2 - 2018/19) will remain as it did in year one, to award small grants to a mixed portfolio of projects, including some smaller one-year projects. Maximum spend per project will be capped at £15,000 per annum, unless exceptional cases are made.
- **Strand II: Employment.** Last year (year 1 – 2017/18) Standard Life Aberdeen funded the employment strand with £80,000 per annum for three years (£240,000 in total). The aim of the strand in year two (2018/19) remains to fund a small portfolio of 3-6 projects of value, preferably spanning over two years each. Maximum spend per project will be capped at £40,000 per annum, unless exceptional cases are made.

13. Both strands welcome applications for funding to be spent over a one or two year period (2018/19 and 2019/20) depending on operational need of the project and strength of the business case. Funding may be awarded in full, in part or not at all.

- For multi-year projects, full detail must be provided in the application on forecast spend per annum.
- For single year projects, funding must be spent before the end of the financial year (31 March 2019).

14. Projects with outcomes that relate clearly to both strands can be considered for funding from both Strands I and II. Applicants should specify this on their application form. The panel will use their discretion to recommend an appropriate balance of funding from each strand.

Outcomes are the changes or differences that your project can make over time. An easy way to think of them is that they are the result of what you do, rather than the activities or services you provide. For veterans this might be things like improved skills, more confidence or self-esteem. Page 10 of the application form provides further information on Inputs, Outputs, Outcomes and Impact.

15. Administrative costs will be considered on a case-by-case basis. Applicants will need to demonstrate a very strong rationale for administration costs with a clear link to project outcomes. Evidence should be provided that these are being kept to a small proportion of the overall costs.

16. The Scottish Government and Standard Life Aberdeen are Living Wage-friendly funders. If a post receives funding from this grant, it is expected that the post-holder should receive at least the Living Wage.

PARTNERSHIP WORKING

17. The Scottish Government is keen to support projects that promote collaboration and partnership amongst the veterans charitable sector, and applicants are strongly encouraged to identify delivery partners and, where possible, potential match funders.

18. Strong joint bids will be looked upon favourably, especially if these promote future sustainability of project outcomes. Veterans Scotland can offer advice to applicants on potential partners within the sector.

ASSESSMENT CRITERIA

19. Before recommending a bid, the SVF panel must be satisfied that the applicant organisation has sufficient competency to deliver the project and to apply sound financial management. All projects must demonstrate a strong and robust business case, including sound financial and management arrangements. It is essential that all bids represent value for money and include evidence that grants will be spent effectively. Applicants must submit a summary copy of their last three audited accounts as evidence of current financial viability (or reports since trading commenced).

20. All applications must set out who will benefit from any project supported by a SVF grant, state clearly what the defined outcomes will be and provide timescales in which they will be achieved. Please see paragraph 14 above and the notes on page 10 of the application for further information on Inputs, Outputs, Outcomes and Impact.

Strand I: General Support

21. The Scottish Government is clear that no one should suffer disadvantage as a result of military service. The General Support strand has a broad remit to support projects that benefit ex-Service personnel in Scotland, particularly those that will help veterans to overcome any disadvantage experienced as a result of service.

22. Projects must be based in Scotland and must have the overall aim of helping veterans in Scotland. Projects should include one or more of the following aims:

- To promote **physical and mental health and well-being** of veterans.
- To assist veterans to secure better access to adequate **housing**.
- To combat **loneliness and isolation**, and promote **comradeship**.
- To support **successful transition** to civilian life following service.
- To help veterans **access services** provided by the public and/or voluntary sector.
- To **raise awareness** of veterans' issues amongst the general public. This may include an education element aimed at children and young people.
- To deliver greater understanding of issues faced by some veterans through new **research**.

23. Beneficiaries may include **families** whose lives have also been geared around the demands of the Armed Forces and who offer valuable support to veterans' transition. Applications of this nature must provide clear evidence of **related benefits for veterans**, and include this as a core objective.

24. There is a range of well-established support for remembrance activities provided through local authorities and other bodies. The SVF is therefore not typically intended to fund these type of events; however consideration will be given to **exceptional** events of a recognition or commemorative nature.

25. Scottish Ministers are keen to develop links with young people and schools to ensure that the debt that society owes to our veterans is better understood. The SVF will therefore be available for bids that promote inter-generational transfer of knowledge, including those that support, or are part of, projects organised by schools.

26. As the SVF has a finite level of resources available for distribution, the maximum level of funding available for individual projects will not exceed £15,000 per annum, unless exceptional cases are made. It is likely the SVF will provide individual payments of much less than £10,000 in order to support as many projects as possible. Where the cost of a project is expected to be in excess of £15,000 per annum, applicants are advised to explore alternative avenues of funding, such as the Armed Forces Covenant Fund, the Big Lottery Fund or other charitable organisations and foundations.

27. Funding may be awarded to successful projects in full or in part over a period of one or two years, depending on operational need and strength of business case.

Strand II: Employment

28. Standard Life Aberdeen has contributed £80,000 per year over three years to the SVF directed towards projects that support employability. Projects are welcomed that focus on the following aims:

- **To assist veterans facing additional barriers to employment;**
- **To promote best practice transitions to employment;**
- **To assist wider spousal/family employment, supporting effective veteran transitions.**

29. Successful applications will be required to apply Standard Life Aberdeen's usual impact reporting and success measures to assess social impact. Standard Life Aberdeen applies Corporate Citizenship's London Benchmarking Group (LBG) framework and measurement, the global standard for benchmarking, measuring and reporting on corporate community investment. London Benchmarking Group is a standard global industry measurement of charitable impact run by Corporate Citizenship. More information can be found at: <http://www.lbg-online.net/> and <https://corporate-citizenship.com/service/lbg/>.

Project managers can benefit from advice and guidance from Standard Life Aberdeen, who will retain an active interest in progress of the project. Please contact Ailsa Watt, Sustainability Programmes Consultant, Standard Life Aberdeen for advice at ailsa.watt@aberdeenstandard.com or Tel: 0131 245 2557.

30. This year (2018/19) funding may be awarded to successful projects in full or in part over a period of one or two years, depending on operational need and strength of business case. Please note that for this strand, the aim is to support projects of strategic value and preference is for a small portfolio of 3-6 projects that will run over one to two years each. If projects are smaller in nature, applications may also be considered under Strand I: General Support.

EXEMPTIONS

31. The SVF will not provide funding for projects that:

- Are based outside of Scotland.
- Are solely aimed at serving members of HM Armed Forces, except for projects with a clear, evidence-based benefit to enable successful transition to civilian life.
- Make direct payments to ex-Service personnel.
- Fund capital works, i.e. building or maintenance.
- Are a reunion, reception or activity for which other funding sources (such as the Big Lottery Fund) could be used.

- Are for the erection, maintenance or repair of a memorial.
- Should be funded from elsewhere - applications should not 'gap fill' a service that is or should be provided by others.
- Have already begun before you obtain funding (in the first year of operation this criterion may be waived in some instances).
- Include a substantial proportion of core administration, personnel or running costs.

HOW TO COMPLETE YOUR APPLICATION FORM

32. Application forms are available on the Veterans Scotland website. A link to the application form can also be found on the Scottish Government website. Only applications made on the application form and submitted by the closing date will be considered. Augmenting material in support of an application may be provided under separate cover.

33. Panel members will have a large amount of paperwork to consider so **please note and respect the word count for each part of the form.**

34. Applications must be received electronically no later than midnight on Thursday 30 November 2017, accompanied by a summary copy of your latest audited accounts for the past three years (or since trading commenced). Applications received after that deadline will not be accepted. The email address for submission is office@veteransscotland.org.uk. If you wish to discuss your application, please contact Veterans Scotland on details provided below.

DECISION MAKING PROCESS

35. All applications will be considered by the SVF panel. This panel will be selected and chaired by the Scottish Veterans Commissioner, and will include representation from Standard Life Aberdeen, Veterans Scotland and other individuals with experience of veterans issues and/or grant-making in Scotland.

36. Panel assessments and recommendations will be submitted to the Scottish Government Defence Policy Unit who advise the Cabinet Secretary with responsibility for veterans. The decision to support, or otherwise, any bid to the SVF rests with the Cabinet Secretary on the basis of recommendations made by the SVF panel.

37. Scottish Ministers are under no obligation to accept recommendations of the panel and their decision is final. However, applicants may make fresh applications in respect of unsuccessful bids in subsequent years.

FUNDS TRANSFER & EVALUATION

38. Once decisions are taken, applicants will be notified of the outcome before the end of the 2017/18 financial year. Funds will be transferred to successful applicants via Veterans Scotland as early as possible in April 2018.

39. Successful applicants for one year funding will submit to Scottish Ministers, via Veterans Scotland, an interim report after 6 months and then a fuller report within 2 months of the end of the financial year in which the grant is received.

For multi-year funded projects an interim report after 6 months and then a fuller report within 2 months of the end of the financial year in which the grant is received, followed by a comprehensive report within two months following the completion of the financial year in which SVF support ends. These reports should all detail how the SVF award has been utilized and the outputs and outcomes of the funded project (The notes on page 10 of the application form provide further information on Inputs, Outputs, Outcomes and Impact. Please also see the guidance notes above at paragraph 14).

These reports should also all include a statement of income and expenditure showing income from all sources and an appropriate breakdown of expenditure for the project in question. The statement of income and expenditure should be signed by authorised personnel. A standard progress report pro-forma is available from Veterans Scotland.

40. Projects which are successful in securing funds through the Standard Life Aberdeen-funded strand will also need to supply evidence of impact to Standard Life Aberdeen in line with its standard procedures. Assistance will be given to project managers by Veterans Scotland and Standard Life Aberdeen to meet these requirements.

GRANT CONDITIONS

41. The Scottish Government or Standard Life Aberdeen Conditions of Grant will apply to all awards made under the SVF. These conditions will be included in any formal offer of funding. All Scottish Government funding made available is subject to our standard regulations on management of public finances.

42. No changes to a project for which a SVF award are to be made without the prior written approval of the Scottish Government Defence Policy Unit. In the event of unauthorised change to the project as agreed, then the Scottish Ministers will be entitled to recover from the recipient organisation some or all of the money originally provided, especially if the scope of the project has reduced.

43. It is not permissible for funding from one financial year to be carried forward into the following year, except with prior written agreement of either Scottish Ministers or Standard Life Aberdeen. Unspent funding at the end of the financial year must be returned to Scottish Ministers or Standard Life Aberdeen, except by prior agreement.

44. Where public money has been applied to fund any tangible asset, in whole or in part, for example a network of PCs or office equipment, that asset is not to be sold or realized without the written permission of the provider of the public funding, in this case Scottish Ministers.

CONTACT DETAILS

45. Any questions on applications should be addressed to the General Secretary of Veterans Scotland who is happy to provide advice on 0131 550 1569 or, preferably, by email to office@veteransscotland.org.uk.