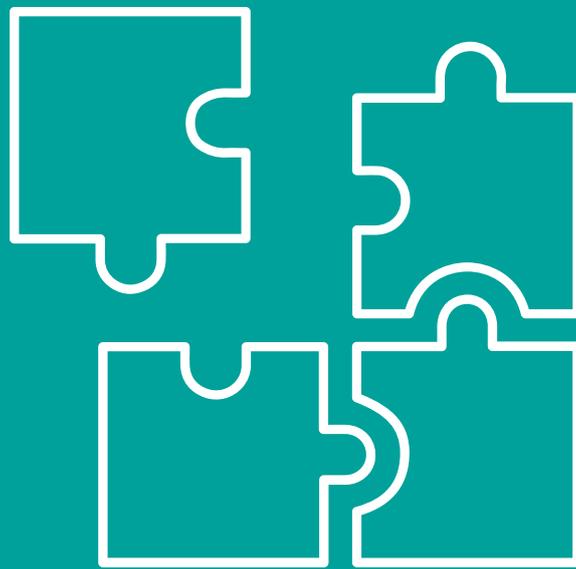


Purpose of this guide

This guide is intended to provide potential applicants to the **Empowering Partnerships: Initiatives** fund with all the information required when deciding to apply and when completing an expression of interest form. Please check our **website** to ensure you are viewing the latest version as guidance may vary from time to time.





About the Trust

Our mission is to build financial capability and create pathways to fair work. We also invest in nature, recognising its vital role in healthy communities and economies. Through our partnerships we want to enable transformational initiatives, spark innovation and generate insight for meaningful impact.

Our Empowering Partnerships programme has three funding pillars:



Ideas

Supporting pilot initiatives that aim to create sustainable solutions to persistent challenges.



Initiatives

Providing substantial multi-year grants aligned to direct programme delivery.



Insights

Investing in research on financial capability, and routes to fair work to inform future action.

Aberdeen Group Charitable Trust is part of Aberdeen Group plc. Charitable collaborations and giving is a key part of the company’s approach to sustainability and, through our Empowering Futures strategy, we aim to make significant social impacts within local communities across the globe.

The Trust is governed by a Board of Trustees, which includes two Independent Trustees, who are ultimately responsible for funding decisions.



About Empowering Partnerships: Initiatives Fund

Through our Initiatives funding pillar, we aim to create transformative, impact-driven partnerships with charitable organisations to empower change and improve people's futures – focussing on increasing financial capability, opening routes to fair work and championing a natural environment.

We run up to two Initiatives funding programmes a year, each round we will invite applications under one of our three priority areas: financial capability, employability and the natural environment. Our application process is a blend of targeted and open applications, for large scale multi-year projects which must be focused on direct delivery in the priority area identified at each round.

Criteria

Each funding round **focusses on one of our three priority areas** – this will be detailed on our **website** when each of the rounds are open, and within our newsletter prior to any funding round opening.

The programme seeks to be **transformational** for the partnering charity and its social or environmental mission, where the organisation and Trust can work collaboratively for impact that goes beyond the funding.

Applications must be for a **maximum** value of £1m over three years for a specific project.

We will **prioritise** applications:

- For projects that demonstrate clear, measurable and significant **impact**;
- That highlight ways in which our partnership may **add value** to the charity, beyond the funding;
- Where the project relates primarily to **direct delivery** in the areas of financial capability and routes to fair work;
- Projects that connect communities to nature;
- From registered charities with an annual income of **less than £5m** per year;
- By charities who are based **within commuting distance** of one of our key office locations globally.

Eligibility

We will fund **registered charities** only.

Exclusions

We **will not** fund:

- Organisations that are political, promote a religious faith, are funders themselves, are statutory bodies, are profit-making, or are not registered charities.
- Individuals.
- Capital projects (such as to build a new or renovate an existing premises including those related to the organisation's social mission).
- Projects that are solely for research, policy, campaigning, influencing or advocacy.



Application process

Stage one process

If your organisation meets the eligibility criteria and you believe the project is a strong match to our priorities in this funding round, you are warmly welcome to:

- Download and complete the **Expression of Interest (EOI)** form; and
- Email it to **charitabletrust@aberdeenplc.com**;
- By the deadline date (see **website**).

Due to our small team's limited capacity and the high volume of interest, we may not be able to offer discussions with potential applicants ahead of EOI submissions. We will however do our very best to respond to all questions or queries, please contact **charitabletrust@aberdeenplc.com** in the first instance.

Shortlisting

Stage one

The EOI forms will be reviewed and scored against set criteria. Up to a maximum of twelve organisations will be invited to stage two. Organisations will be advised if they have been shortlisted within two weeks of the closing date. As we are a small team and expect a high level of interest, we may be unable to provide detailed feedback to unsuccessful applicants at this stage.

Stage two

The Trust staff team will arrange a meeting with the organisations shortlisted to stage two, where both the Trust and applicant organisations will be able to explore the opportunity in more detail. The shortlisted organisations will be asked to complete a more detailed application form, with the Trust staff team and/or an external advisory organisation on hand to support and guide throughout. This stage will take three to four weeks. Once submitted, the applications will be reviewed and scored against set criteria. Up to a maximum of four organisations will be shortlisted to stage three and advised within two weeks. Feedback will be provided to all those shortlisted at stage two.

Stage three

Organisations invited to stage three will have the opportunity to present their proposal to the Trust's Board of Trustees. The Trust staff team and/or an external advisory organisation will be on hand to support and guide throughout. Organisations will have two to three weeks to prepare a short presentation, which will be followed by a brief Q&A. All organisations will be advised within two weeks. Feedback will be provided to all those shortlisted at stage three.

Working with successful partners

We want to be an empowering partner to the organisations we support, that means ensuring we add value in ways which go further than simply distributing funds. We will actively listen and respond to the needs of our partners. We try to be an active funder and want to work collaboratively to maximise the impact and value our partnership can add, involving our colleague community where appropriate to cross-share skills and experiences. The benefit of the charity is always at the forefront of our partnerships.

Impact measurement is critical to the Trust's ability to monitor and understand the social impact achieved, Initiatives partners are required to complete impact data forms up to twice a year. Regular meetings with the Trust team will be agreed as part of the partnership to ensure its success. Where possible, representatives of the Trust will visit the project in location to learn more about the work and gain further insight regarding its impact.



"The Powerful Partnership with the Trust has provided huge amounts of benefits overall. The funding and backing has allowed us to grow our Choices School age programme. But that is only part of the story. The added value to us as an organisation via access to the wider Aberdeen Groups colleagues, agencies and supply chain has allowed us to go through a successful rebrand, publish our new strategic direction, provide work placements, and gain volunteer mentors. This truly is a partnership on all levels and has created a huge impact across all areas of our work."

Working Rite



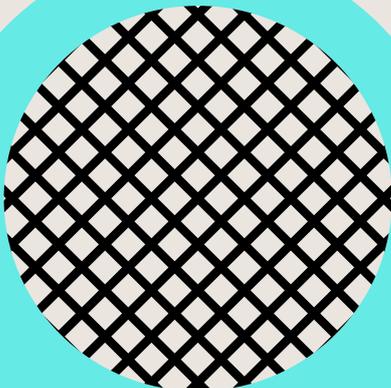
"The Trust's belief in MoneyReady and in the young people we serve has helped us deepen our impact across the UK. Our partnership brings more than resources: it brings strategic insight, encouragement, and opportunities we could not have created alone."

MoneyReady



"The Trust's funding for our financial literacy programme has been transformational, but it's the way they approach the partnership that really stands out. Their questions are always thoughtful and hit the mark; it's clear the team genuinely understands what we're trying to achieve, and are clear in the aligned ambitions of the Trust. They're straightforward and open with us, which has made it easy for us to be the same in return. They've met us where we are and we've appreciated the interactions and input we've had both."

Learning with Parents



Expressions of Interest Guidelines

Frequently Asked Questions

How much can we apply for?

Between £600,000 and £1m over a three-year period to fund a specific project.

Can our project last multiple years?

We typically fund projects over a three-year period; however, we may consider applications for between two and five years if there is compelling reasoning.

The Trust's focus areas are financial capability, employability, and the role of nature in healthy communities and economies. What do you mean by these?

The Trust priorities centre on three interconnected priorities:

1. Increasing **financial capability** relates to projects that help people develop the knowledge, skills and confidence needed to manage money effectively and make informed financial decisions. The goal is to empower people to take control of their futures and achieve financial wellbeing. This might include, for example, activities such as delivering financial education, improving financial literacy and understanding, or addressing barriers to access or knowledge.
2. Our **employability** programme refers to projects which support people to overcome barriers to finding good jobs that offer fair pay, security, and prospects. This might include, for example, activities such as providing skills development and training, offering holistic education and career support, or creating progression opportunities.
3. Championing **the role of nature** means projects that help people and communities thrive by protecting and restoring natural environments. This might include activities, for example, such as promoting access to green spaces for health and wellbeing, supporting nature-based solutions for local economic development, or encouraging sustainable practices that benefit both people and the natural world.

We are not a registered charity; can we still apply?

No, we only accept applications from charitable organisations registered with the relevant regulator in the country they are based in (eg. Office of the Scottish Charity Regulator in Scotland; The Charity Commission in England and Wales).

Can we apply for unrestricted funding?

No, the Initiatives fund is focussed on creating partnerships through direct delivery of a particular project. We would, however, support with the running costs associated with the specific project, this should total no more than 10% of the overall total amount requested.

Can we apply for funding research?

We will prioritise applications for projects that deliver practical, hands-on support to beneficiary groups directly affected by the issues we aim to explore. However, we may consider discreet research projects as part of the funding application where the research is clearly aligned to the delivery project and enables the applying charity to uncover new insights that will significantly extend or enhance the proposed project's outcomes.

If we have applied or been funded by Aberdeen Group Charitable Foundation or abrdn Financial Fairness Trust before, can we apply again?

Yes. Both charities have merged to create Aberdeen Group Charitable Trust, evolving its focus to one unified strategy. Charities who have applied to either in the past are welcome to apply again, provided they meet the eligibility criteria and believe their project is closely aligned to our priorities for this funding round.

If we are not successful, will we receive feedback on our application?

We are a small team with limited capacity, and a high volume of interest is expected. We will do our best to provide feedback where appropriate, but it may not be possible to do so for unsuccessful applicants who submit an Expressions of Interest. However, applicants shortlisted at stage two and three will receive feedback.

Can employees of Aberdeen Group recommend charities?

Yes. We encourage colleagues across the Aberdeen Group to share funding opportunities with eligible charities. However, all applications will be considered using the same criteria and process regardless. Colleagues are also encouraged to share details of charities where they have strong personal connection with the Trust as there may be other opportunities for colleague-led partnership, fundraising and volunteering initiatives.

Are joint applications between two or more organisations allowed?

Yes. We welcome collaboration and wish to help foster joint working within the charity sector globally. One charity will need to be the lead applicant, and any awarded funding can be allocated as required to successfully complete the project.

Will the project be monitored and what feedback will the charity be asked to share?

Yes. The Trust uses a monitoring and evaluation form, based on the **B4SI** framework, that has been developed with an external expert partner, which partners are required to complete and return up to twice a year. It is intended to provide a straightforward platform to enable the successful charity to capture the outcomes and impact of the project without adding additional pressure on resources; and allows the Trust to collate and report on its overall impact within our global communities.

What will be the Trust's involvement in the partnership?

We want to be an empowering partner to the organisations we support, that means ensuring we add value in ways which go further than simply distributing funds. We will actively listen and respond to the needs of our partners. Examples to date have included facilitating the strengthening of networks and connections with other organisations; delivering training, office visits or talks; providing pro-bono help such as skills-based volunteering, office space and communications support.

We try to be an active but helpful funder; we want to work collaboratively to maximise the impact and value our partnership can add. We will agree regular catch-up points together, to discuss progress and identify ways or where we can add value or provide support. Where appropriate, we will visit the project to witness the work and its impact in practice. We are also really interested in involving and engaging our colleagues in the project in a way that is meaningful and useful to the charity and the project's social mission.

Can I contact you with queries or arrange a meeting before we apply?

Whilst we aim to be a fair, thoughtful and approachable funder, we recognise that we are a small team with limited capacity and anticipate interest in each funding window will be high. We have tried hard to address all potential questions in this guide and on our website but understand you may have other questions not covered here, we will endeavour to add to this from any feedback received. You are very welcome to contact us for clarifications on charitabletrust@aberdeenplc.com.

We understand the resource it takes to apply for funding when the likelihood of success is unknown given the large volume of applications we receive. We strongly encourage charities to consider the eligibility criteria and our stated priority areas for each funding round carefully before deciding whether to apply or not. We will work very closely with applicants shortlisted to stage two and three, to guide and support them throughout those processes.

Who are your current charity partners?

You can read all about our current charity partners on our [website](#). Our aim is to have a range of complimentary partners who support people at life's many and various key moments. We are very happy to connect our partners and help identify ways they can share and work together to maximise impact even more.

Aberdeen Group Charitable Trust is registered in Scotland (SC359717) at 1 George Street, Edinburgh, EH2 2LL. A registered Scotland Charity (SC040877).

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