



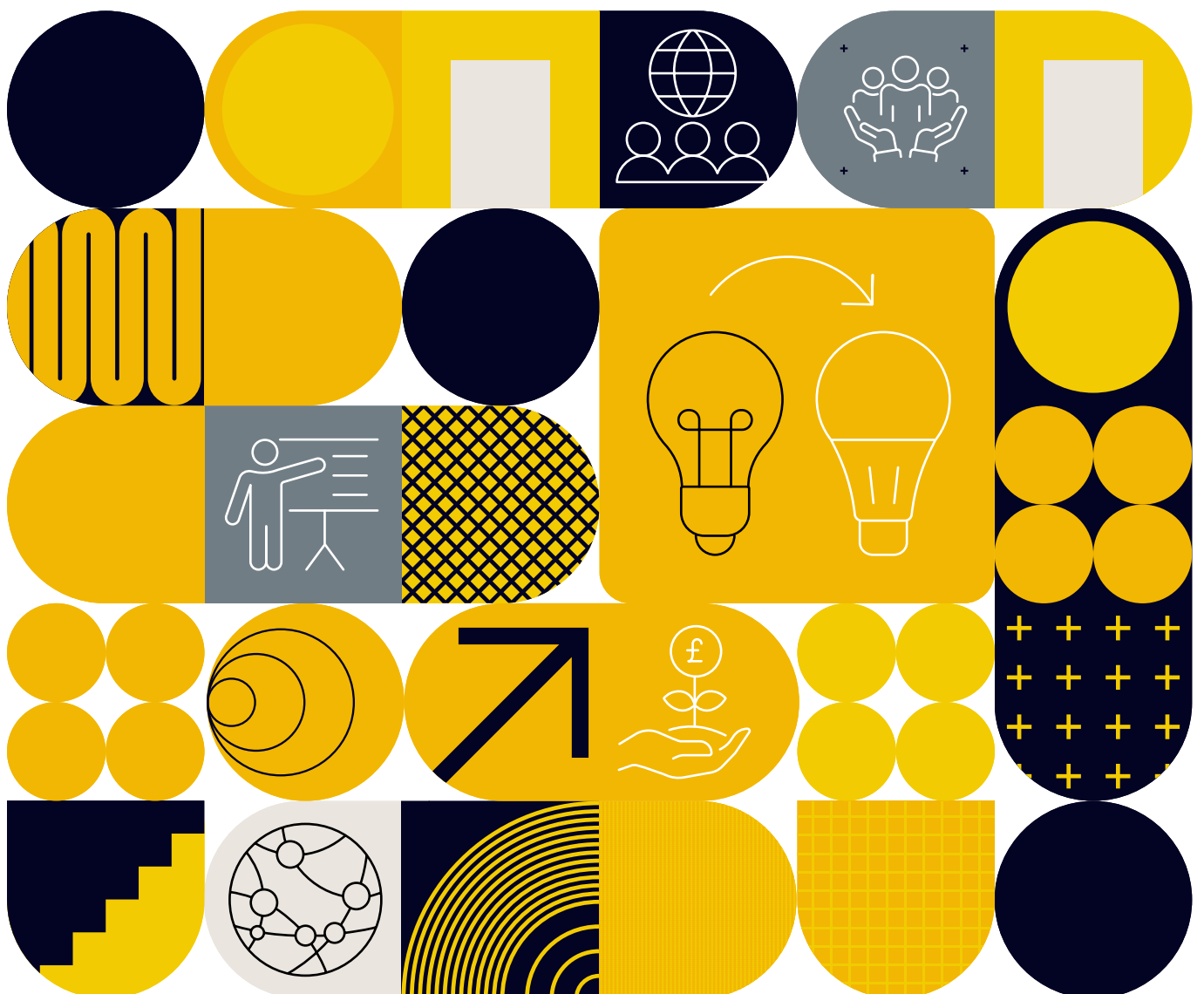
aberdeen

Charitable Trust

# Empowering Partnerships: Ideas

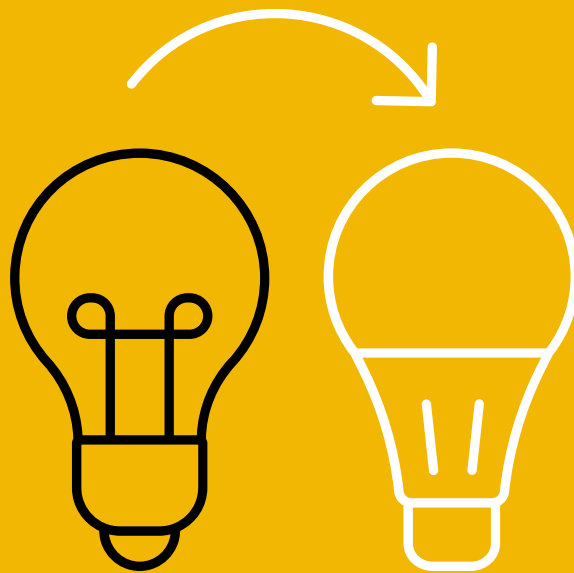
## Application Guidelines

[aberdeenplc.com](http://aberdeenplc.com)



## Purpose of this guide

This guide is intended to provide potential applicants to the **Empowering Partnerships: Ideas** fund with all the information required when deciding to apply and when completing an application 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 the Empowering Partnerships: Ideas fund

Through our Ideas funding pillar, we aim to enable non-profit organisations across the world with the much-needed resources to pilot projects that provide new solutions to persistent problems.

## Criteria

The project must have a clear focus **on one or more of our priority areas**: increasing financial capability, creating pathways to good jobs, or championing the role of nature in healthy communities and economies.

Applications should be for between £20,000 and £80,000 (or local currency equivalent) for up to a maximum of 18 months - we may consider requests for larger amounts but the case must be particularly compelling.

Applications must:

- Be for a specific and new project;
- Demonstrate the project is **innovative, practical and collaborative**;
- Clearly illustrate how the project seeks to tackle the underlying, interconnected challenges at the root of the issue through frontline services;
- Show how the project's learning can be applied widely to **deliver lasting impact** and change in improving people's futures;
- Be from non-profit organisations with an annual income of **less than £3m** per year;
- Be for projects within one of the four regions Aberdeen Group operates in - Americas, APAC, EMEA or the UK;
- Demonstrate impact nationally or regionally, or within a city Aberdeen Group has a significant office base (Boston, New York, Philadelphia, Hong Kong, Tokyo, Kuala Lumpur, Singapore, Bangkok, Paris, Frankfurt, Luxembourg, Edinburgh, London, Glasgow, Leeds, Manchester).

## Eligibility

We **will** fund charities, social enterprise and other non-profit organisations that align with our strategy. They must be registered with the relevant regulators in the area of the world they are headquartered in.

## Exclusions

We **will not** fund:

- Organisations that are political, promote a religious faith, are funders themselves (including grants and loans), are statutory bodies, or are profit-making.
- 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.
- Ongoing or already established projects (we may consider evolutions or development of existing or previous projects where the impact and benefit can be clearly demonstrated as beyond business-as-usual).
- Core costs.
- Newly created job roles specifically for this project (exceptions may be made where there is evidence of sustainability of employment post-funding, e.g. a secondment).

# Application process

Organisations can apply to the Ideas fund at any time while it is open – please check the closing date on our website.

## To apply

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

- Download and complete the application form available on our website; and
- Email it to [charitabletrust@aberdeenplc.com](mailto:charitabletrust@aberdeenplc.com).

## Queries

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 application submissions. We will however do our very best to respond to all questions or queries, please contact [charitabletrust@aberdeenplc.com](mailto:charitabletrust@aberdeenplc.com) in the first instance.

## Funding decision

Applications will be reviewed and scored against set criteria. You will be advised of the outcome of your application within four weeks of the closing date.

## Feedback

You will be advised of a decision, whether successful or not, but we are unfortunately unlikely to be able to provide feedback.

## Working with successful partners

We take a light-touch approach with our Ideas partners but we are an active funder, interested in working 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 to 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, Ideas partners are required to complete an impact data form at the end of the project. 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.



**"What we value most in our partnership with the Trust is the clarity and efficiency of the entire process. The guidelines are transparent, decisions are swift, and the monitoring is professional without creating burdensome reporting load. The scale of the support has been genuinely transformative, giving us the space to focus on developing our programme rather than diverting energy toward additional fundraising. This trust-based relationship has opened meaningful avenues for dialogue and collaboration within the group."**

**Institut Louis Germain**



**"The Trust has been an exceptional partner from day one. They never applied pressure, even when we hit internal hurdles such as staff changes. They backed our judgement, celebrated every milestone with us - big and small - and gave us the space to focus on what mattered. Their flexible, genuinely collaborative approach to funding made an enormous difference... they trusted us as the experts on what our young people need and how best to deliver it."**

**Drive Forward Foundation**

# Frequently Asked Questions

## How much can we apply for?

Applications should be for between £20,000 and £80,000 (or local currency equivalent). We may consider requests for larger amounts but the case must be particularly compelling.

## Can our project last multiple years?

No, projects should be completed within 12-18 months.

## The Trust's focus areas are to increase financial capability, create pathways to fair work, 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.

## What is the application process?

Please complete the application form available on our website and email to [charitabletrust@aberdeenplc.com](mailto:charitabletrust@aberdeenplc.com).

## What is the deadline for applying?

Please refer to our website for the closing date.

## When will I receive a decision?

You will be notified whether successful or not within four weeks of the closing date.

## My organisation or project is not based in the UK, can I still apply?

Yes. We accept applications from eligible organisations based in the four regions where Aberdeen Group operate: Americas, APAC, EMEA and the UK. Applications must be for projects based in or close to one or more of our key office locations within these regions. For a list of Aberdeen Group's office locations please visit **Our locations**.

## We are not a registered charity, can we still apply?

Yes. The Ideas fund is open to registered charities, social enterprises, community interest companies (CIC), charitable incorporated organisations (CIO) or other similar non-profit organisations. However, all organisations should be governed by a relevant regulator in your headquartered country.

## Can we apply for unrestricted funding, core costs or capital projects?

No. The application should be for a specific and new project only. The Ideas fund is not positioned to support core running costs such as staff time or office expenses, or capital projects such as the build or renovation of a facility.

## Do I have to use the application form template to submit or can I use my own format?

We kindly ask that all applications are submitted using the template we have provided to ensure parity and consistency.

## What information should be included in the project's budget?

We recognise that the Ideas fund is to test new ideas and therefore flexibility within the budget may be required. Please outline the total amount requested using high-level budget categories - movement between budget lines for successful projects will be allowed.

### **Can we apply for funding for research and/or campaigning?**

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 or campaigning projects as part of larger funding applications where the research is clearly linked to improving outcomes, enabling the applying charity to uncover new insights that will significantly extend or enhance their field of activity.

### **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. Therefore, we are unfortunately unlikely to be able to provide 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. Colleagues are also encouraged to share details of relevant charities 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. We strongly recommend that the rationale for the partnership, previous experience of working together and agreed ways of working is addressed in the application.

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

Yes. The Trust uses a monitoring and evaluation form that has been developed with an external expert partner, which Ideas partners are required to complete and return when the project has completed. 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.

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

We are an active funder, interested in working collaboratively to maximise the impact and value our partnership can add. Although we take a light-touch approach with our Ideas partners, we will agree regular catch-up points together to discuss progress and identify ways or where we can add value or provide support as appropriate. We may visit the project to witness the work and its impact in practice, if possible. We are also really interested in involving and engaging our colleagues in the project is 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 we anticipate interest in the funding opportunity 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 document with any feedback received. You are very welcome to contact us for clarifications on [charitabletrust@aberdeenplc.com](mailto:charitabletrust@aberdeenplc.com).

We understand the resource it takes to apply for funding when the likelihood of success is unknown given the large of volume of applications we receive. We strongly encourage charities to consider the eligibility criteria and our stated priority areas carefully before deciding whether to apply or not.

### **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 complementary partners who support people at life's key moments. We are very happy to connect our partners and help identify ways they can share and work together to maximise impact.

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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