

Introduction

The last year has been an important one for the Robertson Trust and for me. Our Annual Review provides details of the funding and support we have given to charities across Scotland to support the provision of services and advice to the most disadvantaged in our society. The excellent achievements of the Robertson Scholars are uplifting. Our charity hub at Stirling is nearing completion. We continue to use our voice on issues such as the pressing need for new funding models to facilitate system change within public services in Scotland.

During the year described in our Annual Review, I have had what is euphemistically described as a Big Birthday. Born some 3 years before the creation of the Robertson Trust, I have ruminated on what progress has been made in my lifetime and that of the Trust towards building a fair and compassionate Scotland where everyone can realise their potential. We are living through an age of escalating challenge ranging from climate change, the inexorable impact of technology on all of our lives, to an ageing population and diminishing resources to provide care for the most vulnerable in our society. Despite the excellent work undertaken by the third sector in Scotland, it both saddens and angers me that there is a rising tide of inequality with little progress being made to allow the constraints of poverty to be dismantled. We know this from the applications we receive from charities where so many have to address the immediate pressing needs of individuals, families and communities as they struggle to cope. The sector's capacity to tackle root causes has been diminished.

We have begun our strategy renewal process and are turning our minds to consider how we can play our part in making a fair and compassionate Scotland a reality. We have been listening to our grant holders and stakeholders to understand their concerns about the challenges and opportunities we must address. Like them we are determined to address the root causes of inequality and realise that we cannot do that in isolation.

Accordingly, we will build and contribute towards collective effort to find new ways to provide the support and encouragement required to unlock potential for the benefit of everyone in Scotland

During the year, the Trust has grown in number as we have welcomed new colleagues to the outstanding staff team, ably led by Kenneth Ferguson, all of whom are dedicated to delivering the Trust's core purpose. On behalf of the Trustees, I offer our gratitude for their contribution to the Trust's work.

We have strengthened our Board with the appointment of Edel Harris of Cornerstone and Gerry McLaughlin of NHS Health Scotland whose respective expertise and experience is already proving to be invaluable to our work. I greatly appreciate the time and expertise given so freely by our Trustees and Committee Members to the Trust.

Our income is generated through the efforts of the leadership and staff of Edrington Group Limited. During the year we bade farewell to Ian Curle , Chief Executive of Edrington, who had overseen extraordinary growth at Edrington during his tenure to the benefit of the Trust. We wish him well in his retirement.

Looking forward to the Trust's Big Birthday in a couple of years' time, I hope our new strategy will set out our path to create a fair and compassionate Scotland, while continuing to honour and follow the example of the Robertson Sisters and their determination to make a positive difference for the people and communities of Scotland.

Shonaig Macpherson CBE
Chairman

About us

The Robertson Trust is the largest independent grant making Trust in Scotland and has awarded over £250 million to Scottish charities since 1961. Our mission is to improve the quality of life and realise the potential of Scotland's people and communities – inspired by the example of our founders, the Robertson Sisters. In particular, we focus on the health, social and educational inequalities prevalent in Scotland.

“I want everyone to feel special and valued and they will see what they can aspire to.”

Ethel Robertson

Find out more about our history at www.bit.ly/TRT_History

What we do

To achieve our mission, we focus on four high-level outcomes:

1. improving outcomes for individuals and communities
2. improving capacity of third sector organisations to deliver impact to their beneficiaries
3. building and using evidence to inform policy and practice
4. developing our own understanding of our role as a funder.

We do this by:

- funding and supporting charitable organisations of all sizes who are committed to achieving positive change for individuals and communities across Scotland
- building understanding of the root causes of problems and testing potential approaches and solutions
- supporting talented young people who may face barriers to education and development.

Find out more about how we work at www.bit.ly/TRT_WhatWeDo

2018/19: Our year in numbers

Open Awards



579
charities supported



169
first time grant holders



74%
success rate

total
awarded
£18,004,500

Scholarship



£1,870,000
invested in Journey to
Success



631
Robertson Scholars



82%
of graduating Scholars
achieved a 2:1 or above



73
Scholars graduated
in 2018

Improving third sector capacity



27
third sector tenants in
Robertson House, Glasgow



30,000 sq ft
Hub development
in Stirling



41
funded organisations offered
Funder Plus support



36
outreach events
attended

Building evidence



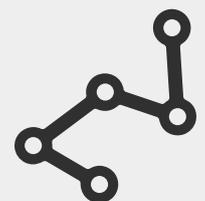
9
live social impact
programmes



£3,400,000
invested from Trust
in live social impact
programmes



£3,100,000
invested from
others in live social
impact programmes



6
live Widening
Access projects

Geographic spread of Open Awards 2018/19



£292,280 – Shetland Islands
www.bit.ly/Shetland19

£52,660 – Orkney Islands
www.bit.ly/Orkney19

£1,159,610 – Highland
www.bit.ly/Highland_19

£521,297 – Perth and Kinross
www.bit.ly/PerthKinross19

£213,670 – Western Isles
www.bit.ly/WesternIsles19

£1,942,540 – Scotland-wide

£566,160 – Aberdeenshire
www.bit.ly/Aberdeenshire19

£138,585 – Moray
www.bit.ly/Moray19

£559,240 – Aberdeen City
www.bit.ly/Aberdeen19

£692,500 – Argyll and Bute
www.bit.ly/ArgyllBute19

£241,115 – Angus
www.bit.ly/Angus19

£620,515 – Dundee City
www.bit.ly/Dundee19

£42,175 – Clackmannanshire
www.bit.ly/Clacks19

£792,627 – Fife
www.bit.ly/Fife19

£176,058 – Stirling
www.bit.ly/Stirling19

£262,076 – West Lothian
www.bit.ly/WestLothian19

£227,256 – West Dunbartonshire
www.bit.ly/WDunba19

£157,610 – East Lothian
www.bit.ly/EastLothian19

£364,845 – Renfrewshire
www.bit.ly/Renfrewshire19

£1,673,383 – Edinburgh City
www.bit.ly/EdinburghCity19

£472,035 – Inverclyde
www.bit.ly/Inverclyde19

£542,710 – Midlothian
www.bit.ly/Midlothian19

£623,031 – East Ayrshire
www.bit.ly/EastAyrshire19

£528,715 – Scottish Borders
www.bit.ly/Borders19

£289,366 – North Ayrshire
www.bit.ly/NAyrshire19

£329,100 – Falkirk
www.bit.ly/Falkirk19

£296,946 – South Ayrshire
www.bit.ly/SAyrshire19

£81,206 – East Dunbartonshire
www.bit.ly/EDun19

£403,131 – South Lanarkshire
www.bit.ly/SouthLan19

£2,412,836 – Glasgow City
www.bit.ly/Glasgow19

£517,075 – Dumfries and Galloway
www.bit.ly/DandG19

£148,410 – East Renfrewshire
www.bit.ly/EastRen19

£653,616 – North Lanarkshire
www.bit.ly/NorthLan19

For a detailed breakdown of awards in each region:

www.bit.ly/TRTAllAwards1819

Improving lives through Open Awards

Our Open Awards programme provides funding to charities and other third sector organisations, supporting their vital work to address inequalities and meet the needs of people and communities in Scotland.

Our funding priorities are split into the following over-arching strands:

Strand 1

Strand 2

Strand 3

Care and Wellbeing

Improving the quality of life for older people and for those affected by physical and mental health issues

View our video funding story with Glasgow East End Community Carers at www.bit.ly/TRT_GEECC

203 awards

£6,059,500

Strengthening Communities

Increasing the ability and capacity of people and communities to create solutions which address their local needs.

View our video funding story with Concrete Garden at www.bit.ly/TRT_CG

227 awards

£7,350,500

Realising Potential

Developing confidence and resilience in young people, particularly those facing barriers to success.

View our funding story with Business in the Community at www.bit.ly/TRT_BITC

149 awards

£4,594,500

Total awards made 579 | Total amount £18,004,500

Did you know?

Since 2017, we have made decisions about small awards and continuation awards on a monthly basis. Our Main and Major awards are decided at four Giving Committees across a year – you can view the key dates, including application deadlines at www.bit.ly/TRT_Deadlines

Strategy renewal

Throughout 2019, The Robertson Trust is going through a strategy renewal process which may result in changes to our funding priorities. Please be sure to visit www.bit.ly/TRT_WhatWeFund for updates or following us on Twitter [@RobertsonTrust](https://twitter.com/RobertsonTrust) for updates.

Improving lives through Scholarship

The Robertson Trust is committed to working towards fair access to further and higher education for every young person in Scotland.

Journey to Success

Our Journey to Success programme offers bursary support and dedicated training and mentoring to talented young people who face socio-economic barriers to accessing and succeeding at university. In June 2018, we held our biggest ever graduation ceremony in Glasgow. This marked the success of 73 graduating scholars, 82% of whom achieved a 2:1 or above.

The year also saw the creation of seven new Career Pathway programmes for specific industries. These have been designed to help guide our scholars towards graduate level jobs and consist of awareness-raising events hosted by industry professionals, internships and mentoring opportunities. Meanwhile, our Summer Internship programme continues to grow, with 88 scholars taking up placements in 2018.

There are now 631 scholars participating in the Journey to Success programme and we are more proactively sharing stories throughout the year on our website. Find out more at www.bit.ly/TRT_JourneytoSuccess

Hear from current scholars

What's it like to be a Robertson scholar?

www.bit.ly/TRT_Dorcas 

www.bit.ly/TRT_Coll 

Excellence Awards

From its earliest years The Robertson Trust has maintained a strand of support for arts training in Scotland. We also provide support for young people in sport through our support for SportsAid Scotland.

This support has focussed on the high cost of training young people in these areas, recognising that costs for training elite athletes and performers can be considerably higher than for many degree courses. One of our most high profile sports awards, the John Macphail Rugby Scholarship, is now in its 14th year. 2019 saw Jacob Henry, Thomas Jeffrey and Kristian Kay being given the opportunity to spend five months operating in the high-performance training facility at Stellenbosch University in South Africa.

Find out more about these awards at www.bit.ly/TRT_Excellence

Improving third sector capacity

The Robertson Trust is committed to helping nurture a strong, vibrant third sector in Scotland by building capacity through the provision of relevant and useful support opportunities and content.

Support for Grant Holders

In 2018, we undertook a review of our Funder Plus support for grant holders. This voluntary support aims to develop organisations' skills and capacity in key areas such as governance, financial planning, monitoring and evaluation through a range of workshops and 1:2:1 support. At present, it is delivered through the following support accounts:

- Cranfield Trust provides support for internal management and capacity
- Evaluation Support Scotland provides support for monitoring and evaluation;
- Community Enterprise provides support for organisations at different stages of a community asset transfer.

The evaluation showed a high level of engagement from those referred and evidence that participants' confidence and knowledge has improved through attendance at workshops. We are now using these findings as part of our strategy renewal process to consider the needs of the sector and ensure our offering continues to respond to the most salient challenges facing charities in today's climate.

Find out more about our Funder Plus support at www.bit.ly/TRT_FunderPlus

Our Giving Team continue to attend outreach events across the country. Find out if we're coming to your area at www.bit.ly/TRT_Events

“The best thing about Robertson House? The opportunity to work alongside other great organisations and charities.” CILIPS

Charity hubs

One of the unique ways we support the sector beyond traditional grant making is through our charity hub model. In 2019, Robertson House, Glasgow, will be joined by our new development, The Barracks, Stirling, which will offer high quality, affordable office and meeting room space to the Third Sector.

Find out more about our Stirling hub at www.bit.ly/TRT_Barracks

Find out more about Robertson House, Glasgow at www.bit.ly/TRT_RobHouse

Did you know?

This year we created a Building Capacity blog channel on our website which features regular content around key challenges many charities face. It also showcases the work of some of our funded organisations. You can view the latest content at www.bit.ly/TRT_BuildingCapacity or even receive it to directly to your email inbox at www.bit.ly/TRT_MailingList

Robertson House, Glasgow, celebrated its sixth birthday in 2019. Find out what some of our current tenants had to say about their experiences of operating from a charity hub at www.bit.ly/TRT_RH6TH

Building and Using Evidence

Some issues cannot be addressed simply by providing grant awards to individual charities. Through our Social Impact work, we aim to develop our understanding of challenging problems within identified themes and work in partnership with third and public sector organisations to test solutions.

We actively seek to use evidence we build to inform broader policy and practice.

Our current themes are:

- Improving the Life Chances of Children and Young People
- Improving the Wellbeing of Women and Girls
- Sport for Change
- Innovative Funding

Unlike our Open Awards programme, funding for our Social Impact programmes is not always available through an open application process. Instead, organisations are invited to work with us to develop a programme or project in our theme areas, with the aim of addressing root causes and providing evidence.

We are proactively sharing learning and updates throughout the duration of a project – you can see the latest updates at www.bit.ly/TRT_SocImp

Significant progress has been made in the following two projects in 2018/19

Reframing Care Experience and Concept of Care

This partnership with CELCIS, the Life Changes Trust, William Grant Foundation and the Scottish Government, aims to ‘reframe’ perceptions and opinions of the care system in Scotland and of care experienced young people themselves. The aim is to facilitate improved public understanding of the issues affecting vulnerable children and families, and of the support available. In 2018, the first two reports from this programme were published; *Seeing and Shifting the Roots of Opinion and Slipping Through the Cracks*.

View all materials associated with this programme at www.bit.ly/TRT_FrameWorks

Changing Lives Through Sport and Physical Activity

2018 saw the launch of this partnership programme between The Robertson Trust, Scottish Government, **sport**scotland, and Spirit of 2012, which aims to address the main recommendations in the Sport for Change research published in 2017. The programme aims to develop clear messaging and leadership roles around how sport and physical activity can be used as tools to bring about positive change for individuals and communities. To support this, a range of learning and development resources are being developed to build knowledge, skills and capacity within the sporting sector. Meanwhile, the programme also includes a £1 million fund for providing short term additional resource to the sporting and community sector.

View all materials associated with this programme at www.bit.ly/TRT_CLTSPA

Did you know?

In 2018, we launched a dedicated section on our website for our Widening Access projects, which shares the latest news, videos and features. This can be accessed at www.bit.ly/TRT_WA

Widening Access

Through our Widening Access Projects we aim to have an influence on the development of the whole learner journey.

By supporting a range of partners to develop and deliver interventions that remove barriers to participation and support transitions to Further and Higher Education we aim to contribute to the evidence base of what works and what doesn't in widening access to education.

Borders Young Talent

This project uses mentoring approaches to support targeted young people to make successful transitions from school to college. An evaluation in 2019 highlighted the programme's impact; including participants' increased sense of belonging, improved confidence and reduced barriers to learning. Watch our video about the programme and access the full evaluation at www.bit.ly/TRT_BYT

■
“It gave me the motivation to continue” BYT participant

Understanding our role as a funder

We recognise that how we fund can be as important as what we fund.

The Robertson Trust is committed to ensuring that we use our resources as effectively as possible to best support positive outcomes for individuals and communities, and the organisations working with them. Rather than working in isolation, we are committed to collaborating with other funders and partners to share resources. We continue to be an active member of the Scottish Grantmakers and the Scotland Funders' Forum.

In 2018/19 we have tried new ways of funding to support Scotland's third sector. These include:

Rural Action Fund

In Partnership with Youth Scotland we established the Rural Action Fund to support small, volunteer-led youth clubs in rural communities, who would otherwise be unable to access funding from the Trust. This will be match funded through support from The Gannochy Trust in 2019/20. View the Impact report at www.bit.ly/TRT_YouthScotland



**3,176
young people
reached**



**£28,872
funding to
55 projects**

Social Bridging Finance

Social Bridging Finance is a new grant funding model being piloted by the Trust. It has been designed with the intention of enabling public services to innovate and move to greater preventative spend through bringing together a working partnership of public sector, third sector and independent funders. As such, it aims to ensure the long-term sustainability of services delivered by the third sector which can evidence success. In 2019 the Trust is embarking on a journey to test the

model and build our understanding of how it works in practice through three demonstration projects. We will be sharing our learning as we go and will be actively encouraging other independent funders, public sector and third sector organisations to try the model and share their experience of it with us.

Read our two-page summary of SBF at www.bit.ly/TRT_SocialBridging

Strategy Renewal

The context in which funders and third sector organisations operate is continually changing and we are using our current strategy renewal process to review how we fund and to develop approaches which will best support the sector we work with. To achieve this, we have carried out thorough analysis of our awards over the past two years to draw out insights which can help with our strategy renewal process. We are also working with our grant holders and the wider sector to ensure the development of the strategy reflects real world experience, and that our support (financial and non-financial) offering is as effective as it can be.

We will be communicating regularly about our strategy renewal process on our website and would advise those with an interest in our work to keep up-to-date at www.bit.ly/TRT_Strategy.