



# **Giving Strategy** 2016-2019

# The Robertson Trust vision is to improve the quality of life and realise the potential of people and communities in Scotland – inspired by the example of our founders, the Robertson Sisters.

We do this by recognising and responding to need and disadvantage, and by building the capacity and sustainability of charitable organisations. Every year, we fund and support charitable organisations of all sizes, committed to achieving positive change for individuals and communities across Scotland.

## Giving Strategy

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The purpose of this document is to summarise the overall aims of the Trust's new Giving Strategy covering the period from 2016 to 2019.

We aim to:

- Describe the principles which underpin the Trust's new Giving Strategy
- Explain the positive changes (outcomes) which we hope our funding will achieve over the next three years
- Outline the context and provide a full description of our newly developed Funding Strands including some of the identified needs and where we think our funding can make a difference.

We have consulted extensively throughout the development of this Strategy and its conclusions have been informed by the following sources:

- information and learning from our funded charities
- contributions from external stakeholders events
- the use of published evidence and data

As a result of this process, we hope that the way in which the Trust distributes funds during the next three years will aim to address some of the needs and challenges faced by people living in communities across Scotland.

Although the Trust will continue to support a broad range of charities and projects throughout Scotland, we have created a new structure for applicants to apply through our open awards programme.

This will incorporate three funding strands, the details of which will be described at a later stage within this document under the following headings:

- Care & Wellbeing
- Strengthening Communities
- Realising Potential

# Challenges

Through consultation we sought to understand some of the main challenges facing organisations working in the third sector and the individuals who they support.

From this we identified the following:

## Key challenges for charities

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- The prevalence of short-term funding and the difficulties this presents in recruiting and retaining staff.
- The need to 'reinvent the wheel' when applying to funders rather than being supported to deliver core, existing services and activities.
- The lack of funding for "non-deliverables", e.g. overheads, capacity building, planning, infrastructure

## Key challenges for people using charities' services

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- Poor mental and physical health and wellbeing
- Social exclusion and isolation
- Poverty and financial hardship
- Lack of access to employment
- Lack of confidence and poor personal/interpersonal skills.
- Unstable family and support networks
- High levels of risk taking behaviours

Our three funding strands and their respective themes have all been developed in response to the above identified needs. Whilst Funding Strands include examples of some activities which may be relevant within these themes, this is **not** an exhaustive list and we welcome applications for innovative approaches and activities which address the issues described in each of the respective strands. In all cases applicants should, however, demonstrate how these contribute to the achievement of one or more of the Trust's Giving outcomes.

Whilst committed to working across these strands for the duration of this Giving Strategy, the types of projects and activities funded within them may change as we increase our learning on the basis of ongoing evaluation.

# Our Principles

The Robertson Trust has identified five principles which directly relate to the Giving Strategy in terms of how and where we make awards. These are:

- 1 We will make funding decisions based on the applicant's ability to reduce disadvantage and inequality which affects people using their services.
- 2 We will respond flexibly to applications for support from charities throughout Scotland, irrespective of their size or location. We will take particular care to meet the needs of grass-roots charities.
- 3 New ways of funding will be used where they have demonstrable potential to maximise sustainable impact for our beneficiaries.
- 4 We will use our convening power and networks to foster and promote new ways of funding and partnership working.
- 5 Each of our awards will be subject to an appropriate level of monitoring and evaluation which we will analyse and use to inform future funding decisions.

# Trust Outcomes

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There are four outcomes which we believe to be relevant to the Trust's Giving. These are:



The above are incorporated within our three Funding Strands. We anticipate that the nature of the work undertaken by our funded charities should always aim to achieve at least one of the above outcomes.

# Funding Strand 1 – Care and Wellbeing

“Improving the quality of life for those affected by physical and/or mental health issues and their carers.”

**This Strand** focuses on improving people’s physical and mental health. It recognises the need to address the significant health inequalities which exist in Scotland and reduce the levels of exclusion faced by some of the most vulnerable members of our society. In addition to encouraging preventative approaches to improve health and wellbeing, this Strand will also incorporate responsive approaches which support those with mental or physical ill-health to live independently.

*The three themes where the Trust wishes to focus its funding within Care and Wellbeing are as follows:*

## 1 Ensuring the best quality of life for Scotland’s vulnerable adults, including those directly or indirectly affected by Dementia

Here we are interested in work which reduces physical and social isolation of older people and reduces their dependence on statutory services. We are also interested in preventative activities which encourage older people to remain active and healthy.

### Examples of activities are as follows:

- Men’s Sheds/learning new skills
- Carers support services/respite care
- Training costs of care providers
- Support for people directly and indirectly affected by Dementia
- Befriending projects which help people remain connected with their community
- Day centres and community transport
- Recreational activities including therapeutic arts and physical exercise

## 2 Improving the health and wellbeing of children & young people affected by mental and/or physical ill health

Here we are interested in supporting services which are timely and reflect the needs of children and young people. We are keen to ensure that stigma around mental health conditions is challenged and that services are designed to reduce negative outcomes for young people. We also recognise the importance of inclusion for young people and the particular risks involved in moving from children to adult services.

### Examples of activities are as follows:

- Counselling/therapeutic services for young people with mental health issues
- Bereavement support and services for young people
- After-school clubs/summer programmes for children and young people which adopt an inclusive approach for all young people.
- Mentoring support for young people transitioning from children to adult services

## 3 Supporting adults with life limiting, long term health conditions or disability to overcome barriers and remain involved with their communities

Here we are particularly interested in approaches which provide people with the tools and resources to manage their condition and continue to be fully engaged with their community and with mainstream services.

### Examples of activities are as follows:

- Salary costs of a Worker to develop groups which provide peer support for people living with specific conditions such as Diabetes
- Physiotherapy/alternative therapies for people affected by conditions such as Parkinson’s/M.S.
- Community-based palliative care services
- Support services for adults affected by learning and/or physical disability

# Funding Strand 2 – Strengthening Communities

“Increasing the ability and capacity of people and communities to create solutions which address local need.”

**This Strand** has been developed in response to the social inequalities in Scotland. Within Strengthening Communities we hope to support work which benefits those who have been disproportionately affected either economically, or due to the marginalised nature of their peer group. We also recognise the value of building on local assets and wish to support organisations and communities which come together to create meaningful, sustainable solutions to address local need.

*The three themes where the Trust wishes to focus its funding within Strengthening Communities are as follows:*

## 1 Reducing health and social inequalities in Scotland's communities

Here we are interested in targeted, early intervention approaches which improve outcomes for children and strengthen family and community relationships. We also wish to see better integration with marginalised groups and improved safety and wellbeing of vulnerable groups.

### Examples of activities are as follows:

- Home support services for families experiencing difficulty
- Pre-birth and parental education, training and support for young/vulnerable parents
- DIY/Housing Worker to support vulnerable people to sustain their tenancies
- Services for women at risk of or affected by domestic abuse or sexual violence
- Support for people affected by addictions

## 2 Supporting people and communities to find routes out of poverty

We recognise that people do not wish to be dependent on crisis provision and we are interested in supporting activities which increase the skills and knowledge they need to make better use of available resources

### Examples of activities are as follows:

- Community services which build skills and networks to support people affected by food poverty
- Financial literacy and budgeting programmes
- Practical information and support delivered through or in partnership with the Citizens Advice Bureau network
- Projects which focus on sharing and learning new skills including cooking and community growing

## 3 Empowering communities

Here we are interested in approaches which increase the ability of communities to meet their own identified needs and which make best use of local assets.

### Examples of activities are as follows:

- The capital costs of upgrading community facilities/village halls
- Development worker to liaise with local groups and develop initiatives such as befriending services or youth activities

# Funding Strand 3 – Realising Potential

“ *Developing confidence and resilience in young people, particularly those who face barriers to success.* ”

**This Strand** is based on recognition that there are social and educational inequalities in Scotland which emerge from a very young age. By supporting activities, projects and organisations that seek to address these inequalities The Robertson Trust aims to support more young people to reach positive destinations.

This Strand will also capture work which identifies and nurtures talent in young people across a wide range of disciplines, helping to create a body of young people who are confident and resilient with the potential to become future leaders within their field.

*The three themes where the Trust wishes to focus its funding within Realising Potential are as follows:*

## 1 Enabling young people to realise their potential

Here we are interested in activities which provide a platform for those young people who face particular barriers to achieving their goals. We wish to fund work which improves their skills, confidence and self-esteem, helping them to build healthy relationships in a supportive environment.

### Examples of activities are as follows:

- Life skills workshops which strengthen young people's confidence, self-esteem and ability to make independent decisions
- Youth work which uses participation in sport, the arts and education to improve wider social outcomes for young people
- Services which provide employability/skills training for disenfranchised young people to bring them closer to the job market

## 2 Supporting “at risk” young people to make positive choices

In this area we expect to fund targeted interventions which help to divert young people who are likely to, or who are already demonstrating, risky behaviour which may impact on their long term well-being.

### Examples of activities are as follows:

- Activities which are creative in helping young people to learn and make informed choices about the use of drugs and alcohol
- Work which aims to divert vulnerable young people away from the criminal justice system into positive destinations
- Costs of salaries for people working with young people in the field of sexual health

## 3 Broadening horizons and nurturing talents among Scotland's young people

We recognise that there is a wealth of talent amongst our young people and are keen to support initiatives which are proactive in their approach, providing opportunities for young people to participate and develop skills in all forms of arts and educational activities.

### Examples of activities are as follows:

- Salary costs of Development Worker to work in rural communities providing workshops in drama/music
- Outreach programmes which aim to inspire and engage young people in learning new subjects e.g. STEM subjects or digital skills
- Programmes which provide development opportunities for talented young people