



THE
RS MACDONALD
CHARITABLE TRUST

STRATEGIC PLAN

2019-2022

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Introduction

This three year plan is firmly focussed on achieving the Trust's mission of supporting our beneficiary charities to achieve their purpose. The Trust's mission and values are the starting point and the guide for its implementation.

This plan is an extension to, and development of, the 2017 strategic plan and does not stray from its ambition. We shall align our funding to the thematic priorities identified from our work with NPC in 2016 and have a clear determination to build relationships with, and across, those we fund. In an external environment that is increasingly uncertain, we aim to provide charities with an element of stability and to help them address their challenges with increased confidence.

We are ambitious for the sake of those that we fund, and hopeful around the opportunities this strategic plan will offer them.

Rachel Campbell

Director

Mission

Our mission is to support our beneficiary charities to achieve their purpose.

Ethos and Values

A sense of family and community are important aspects that underpin the origins of the Trust. We are keen to retain personal contact in the way that we deal with our applicants and grant beneficiaries.

When we have awarded grants to organisations we take an active interest in them and the activities they are involved in. We want to encourage our beneficiary organisations to feel part of our community, and we will seek ways to bring people together.

When considering applications for grants, we are aware of the importance of family and the wider community in providing support networks. We are interested in services that support carers and family members as well as those who are directly affected by particular conditions or who have suffered abuse.

We are also aware of the importance of being connected and involved in communities, and want to support those organisations that enable wider participation in society of those who are sometimes excluded.

Our aim is for The RS Macdonald Charitable Trust to provide a welcoming environment that is positive, encouraging, and facilitates beneficiary organisations to be better in delivering their aims.

As a Trust, we seek to demonstrate our core values in all that we do by being:



Strategic priorities 2019 - 2022

Our mission is to support our beneficiary charities to achieve their purpose. We will be better able to support charities if we know them and understand them better. Charities will be better able to deliver their purpose if they work effectively with others.

Therefore, over the next three years the Trust will prioritise:

- Building relationships with the charities we support
- Supporting charities to collaborate

1. Building relationships

Over the next three years our aim is to build stronger relationships with the charities we support by developing our communication with them and taking time to understand their requirements during the lifetime of the grant award.

This relational approach is already expressed in the ethos of the Trust. By focussing more on the needs of the charities our processes and decision making will adapt to those needs. The research from NPC was very clear that charities value longer term, core funding and one consequence of a more relational approach is that those types of awards will become more common.

We will continue to create opportunities for Trustees to learn about, and hear directly from, those we are funding.

2. Collaboration

Over the next three years our aim is to support charities to effectively collaborate with others who can help them to achieve their objectives. Supporting collaboration will become core business of the Trust, and we will become more proactive in making it happen. As we focus more on supporting collaboration, we will also be more open to collaborating with other funders.

Thematic Priorities 2019 – 2022

Care and Welfare

The NPC research highlighted a number of thematic priorities that charities would like the Trust to focus on. Over the next three years, we will take these priorities into account when assessing grant applications and identifying strategic grant opportunities. It has also been agreed that the Trust will not normally be inclined to award grants for campaigning work.

In order to measure impact of the Trust's funding, grants that address one or more thematic priorities will be flagged and an overview report will be provided annually to Trustees.

Neurological Conditions

More efficient services, including services that meet needs across multiple conditions

- *This is likely to include services that address social, emotional and financial needs of people affected by neurological conditions, and may also include examples of collaborative and integrated services.*

Gaps and neglected groups

- *Low incidence conditions will be given some element of priority as well as services that are meeting identified gaps in service provision for particular age groups.*

Addressing limited service provision in rural and remote areas

- *As well as supporting local services, the Trust will work with charities that are developing technological innovations that address geographical inequalities.*

Tackling child abuse and neglect

Targeted prevention programmes

- *These are likely to be programmes focussed on parents with one or more risk factors such as maltreatment in childhood, substance misuse, mental health issues, or domestic violence in the household.*

Work with perpetrators

- *This type of work may be challenging and difficult for other funders to support, but carries the potential of real impact in breaking a cycle of abuse.*

Visual Impairment and Sight Loss

Access to new technology and alternative techniques

- *The Trust will look to foster innovations that have the potential to transform lives.*

Funding for charities outside of the traditional visual impairment sector

- *This may be about increasing the capacity of frontline workers in schools, hospitals, community centres and care homes to better meet the needs of visually impaired people.*

Lower incidence conditions

- *By focussing on lower incidence conditions, the Trust may be able to play a convening and facilitating role, bringing together experts and those who work in the sector.*

Animal welfare

Education of pet owners

- *This emerged as a top priority for domestic animal welfare and we will look for opportunities to reach more people through education programmes, and piloting new approaches.*

Interventions that target both animals and humans

- *We will be interested in models of work that can be developed, tested and brought to scale.*

Medical Research

Over the last few years, the Trust has refined the research grants process that has seen an increased focus given to seedcorn funding within universities. Over the next 3 years we will develop this model of funding in order to support the individuals and departments in Scotland that are able to deliver research on the Trust's thematic areas of Neurological Conditions and Visual Impairment/Sight Loss.

When considering how best to allocate funds towards research, the Trust will be guided by two main principles:

- *Excellence* – we will support the departments and teams that have a track record of delivering excellent research.
- *Development* – we will invest in early career researchers in order to grow the pool of talent working on neurological conditions and visual impairment. We will invest in new ideas and innovative approaches that have the potential to leverage additional funds and lead to breakthroughs.

The strategic priorities of the Trust will be achieved through:

- *Building relationships* – it will be important to develop relationships with the researchers, as well as with the University development teams and the charity fundraisers. This will help us to better understand the opportunities, funding gaps and links that can be made.
- *Collaborations* – we will encourage collaboration across disciplines, between different universities, and between universities and charities.

The model of funding has two routes – one for universities and one for charities.

We will encourage universities in receipt of seedcorn funding to identify projects that could be funded in collaboration with a research charity. Likewise, projects that have been funded through a charity may help to identify future recipients of seedcorn grants.

Opportunities will also be sought for strategic grants to be made for medical research.

Grants programme

The Trust will continue to operate a grants programme made up of:

- Small grants
- Main Grants
- Strategic Grants

Charities whose purposes and beneficiaries relate to the Trust's themes will be able to apply for core or project funding. Other charities will be able to apply for projects that are in line with one or more of our charitable objects.

Reports will be required on an annual basis and visits will be made to charities at various points through the cycle of their grant.

Strategic awards will be considered for proposals that meet one or more of the following criteria:

- Involve a collaboration with other partners
- Innovation of a new programme or concept that requires pump priming
- Is enabling a programme to be taken to scale by replicating it in one or more new areas

	Amount	Length	Application process	Comments
Small Grants	Up to £15,000	No more than 1 year	Online	Will be mainly for one off projects or contribution to costs of pilot initiatives.
Main Grants	Over £15,000	Up to 3 years	Online	Expect to see an increase in the number of awards for core funding.
Strategic Grants	Up to £150,000	Up to 3 years	By invitation	Partnership and innovation will be key identifiers

Non-financial support

The programme of non-financial support that has been developed over the past 3 years will continue and further consultation with beneficiary charities will seek to identify other ways in which non-financial support can be offered.

The main areas of support will be in relation to:

- Access to meeting rooms
 - o We will continue to offer a professional and welcoming service to groups that use our premises.

- Capacity building
 - o We will continue to offer training for beneficiary charities, and to address organisational and managerial capacity where appropriate. Our professional advisers may also offer some of their events out to our network.

- Networking
 - o We will identify opportunities for bringing charities together.