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# OUR STRATEGY

## 2022 - 25



THE  
**RS MACDONALD**  
CHARITABLE TRUST



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# INTRODUCTION

As we draw to the end of our strategic period 2019-21 we have taken the time to reflect on progress made and on challenges ahead. A year into embedding a collaborative and relational approach to our funding, the onset of the Covid-19 pandemic led us and those we were funding into a period of uncertainty and change. In response, our approach and flexibility were equally recognised to be of great benefit to those we were funding. Similarly, those seeking new funding were encouraged to do so on the understanding that circumstances would likely change and that we would help charities to manage their grant accordingly.

Perhaps the greatest learning was how important a role we could play by offering to bring organisations, and their leaders together. They went on to work collaboratively, to share and learn from each other, often around themes which were affecting so many – sustainability, staff engagement, risk management and impact measurement. In offering expertise to help guide our beneficiary charities, their vital projects or services would remain strong and reach their beneficiaries as intended.

This new strategy seeks to enhance and strengthen our offer – to make as much of an impact as possible with our grants, and ultimately for the progression of the sectors into which we fund. We enjoy the rich and varied conversations we have with charities, and in learning the impact they make. We hope these deep roots of connection continue to mark us as a meaningful and engaged funder in Scotland.

## MISSION

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

## ETHOS AND VALUES

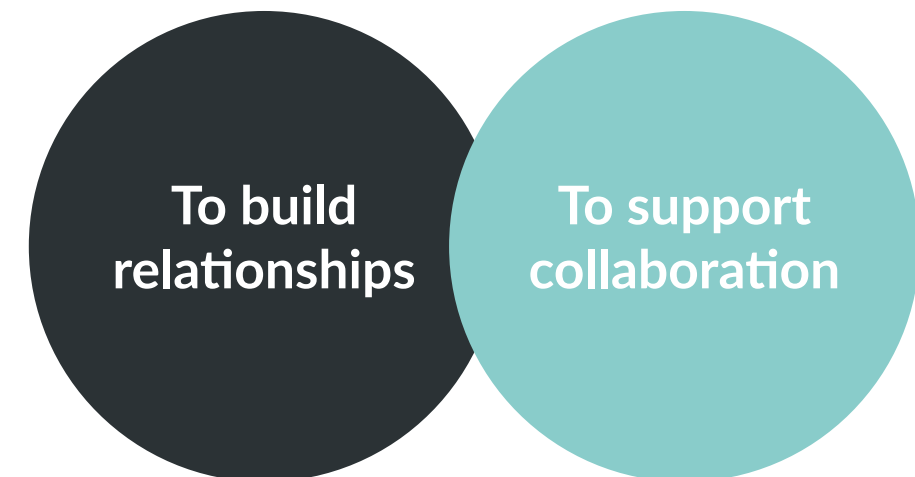
Our continued aim is for The RS Macdonald Charitable Trust to provide a welcoming environment that is positive, encouraging, and facilitates beneficiary organisations to be better in delivering their aims.

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



## REVIEW OF PROGRESS: 2019 - 2021

Our strategic plan from 2019-21 helped us to follow an approach to our grant-making which would best serve our mission. Since 2017 our Strategic Priorities have been:



Further, we considered specific elements of work within our funding themes which would be considered a priority, based on work we had asked New Philanthropy Capital to undertake looking into where our funding would help meet gaps and/or maximise impact. These have been our 'Thematic Priorities' and have served as a guide for charity applicants and in our assessment processes.

Our staffing has been structured to provide dedicated capacity to broaden and deepen our work with those who seek our support. We have given more time to speaking with our charity beneficiaries at every stage of our grant making process, giving each a dedicated point of contact so they can speak with someone who knows their organisation.

Each year, the progress against the Strategic Priorities has been considered. Of course, in 2020, just as our structure and approach had started, the impact of Covid-19 and governmental lockdown meant that our capacity became focused on adaptation, re-appraisal and flexibility within our existing grants, and configuring a grant programme which would best meet the demands of charity applicants.

As a result, meetings with beneficiary charities grew exponentially in 2020/21, albeit these were conducted remotely, and our ability to visit some of the projects we are funding has been put on hold. Whilst nothing replaces an in-person visit, we made ourselves available and visible to a large number of charities.

Further, in recognition of our ability to support charities not only through funding but in offering expertise and advice, we grew our offer under our 'beneficiary training' programme, which became enhanced with more tailored offerings to develop organisational and managerial capacity. This was developed in dialogue with beneficiary charities to ensure the programme was a reaction to their needs, and offered a significant space for them to come together, collaborate and support each other as peers and with the help of expert consultants from within our partner organisations who delivered the programme.

Our grants programmes have continued to provide financial support to deliver on our mission, and we did not deviate from providing three-year grants, in recognition that charities would benefit from a long-term commitment amidst so much uncertainty.

When thinking about the impact of our Strategy 2019-21, we asked a number of grantholders to give feedback about our process, our grants, our collaborative opportunities/training and our approach more widely. This was widely affirmative and helped both staff and trustees reflect that we have not only delivered on our strategic ambitions, but that they are working well and have made a meaningful impact for those we fund.



## LOOKING FORWARD

When considering 'what's next', we thought about the environmental factors which may well impact upon the landscape for our charity beneficiaries in the next three years:

- 1 The longer-term consequences of the pandemic for those who are most vulnerable**
- 2 Needs within organisations including leadership, employment, embedding new ways of working and monitoring impact**
- 3 Income streams/diversification and reserves policy**
- 4 Public sector funding and wider economic factors**
- 5 Scottish Governmental policy and trends in grant-making**

It was clear that the longer-term impact of Covid for both individuals our grants support and for the charities we fund, are not yet fully understood, but may impact on the type and number of applications we receive. We shall retain our ongoing commitment to fund requests under each of our funding themes in the same way we did in our last Strategic Period 2019-21.

To this end, a central focus in our Strategy 2022-25 is flexibility. We remain ambitious for the impact of our funding and the difference this makes to the charities we fund. As such, our strategic direction which is set out below will be one which we consider agile and flexible, able to accommodate the developing needs of the charities we support and their beneficiaries.

Further, we will remain committed to operating under robust systems of governance and, in relation to our investments, in reviewing market performance and adherence to Investment Policy.



## OUR APPROACH

**‘The goal of our grant making is to provide a meaningful contribution to those who receive our funding, and to provide effective and responsive relationship management which helps them to achieve their ambition’**

We adopt a relational approach to grant-making to ensure we support our applicants, grantees and wider stakeholders to promote effective use of our resources. Our values-led approach is core to how we approach our relationships. We will:

Listen to and better understand the needs within those applying for, and those in receipt of, our funding.

Support collaborative opportunities in both the grants that we offer and our wider networking.

Be flexible to adapting our individual grants and also our programmes more widely as required.



## OUR THEMATIC PRIORITIES

The RS Macdonald Charitable Trust grants to registered charities who operate in Scotland within one or more of our nominated funding themes. These are split into ‘Care and Welfare’ and ‘Medical Research’. We encourage applicants to consider our Thematic Priorities.

### A. Care and Welfare

Our NPC research highlighted a number of thematic priorities that charities would like the Trust to focus on. As with our previous strategy, we will continue to take these into account when assessing grant applications. The Trust will not normally be inclined to award grants for campaigning work.



- 1. More efficient services, including services that meet needs across multiple conditions**  
In looking at efficiency, we will look to identify proposals which maximise impact. 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.
- 2. 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.
- 3. 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.

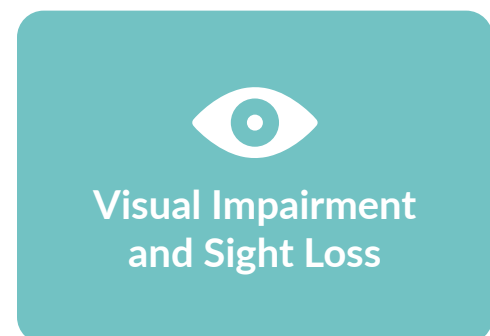


### 1. Targeted prevention programmes

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.

### 2. 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.



### 1. Access to new technology and alternative techniques

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

### 2. 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.

### 3. Lower incidence conditions

### 1. 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.

### 2. Interventions that target both animals and humans

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



## B. Medical Research

We provide grant funding into research relating to neurological conditions and visual impairment. When considering how best to allocate funds towards research, the Trust will be guided by two main principles:

### 1. Excellence

We will support the departments and teams that have a track record of delivering excellent research.

### 2. Development

We will invest in young 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 current model of funding has two routes – one for Universities and one for Charities.

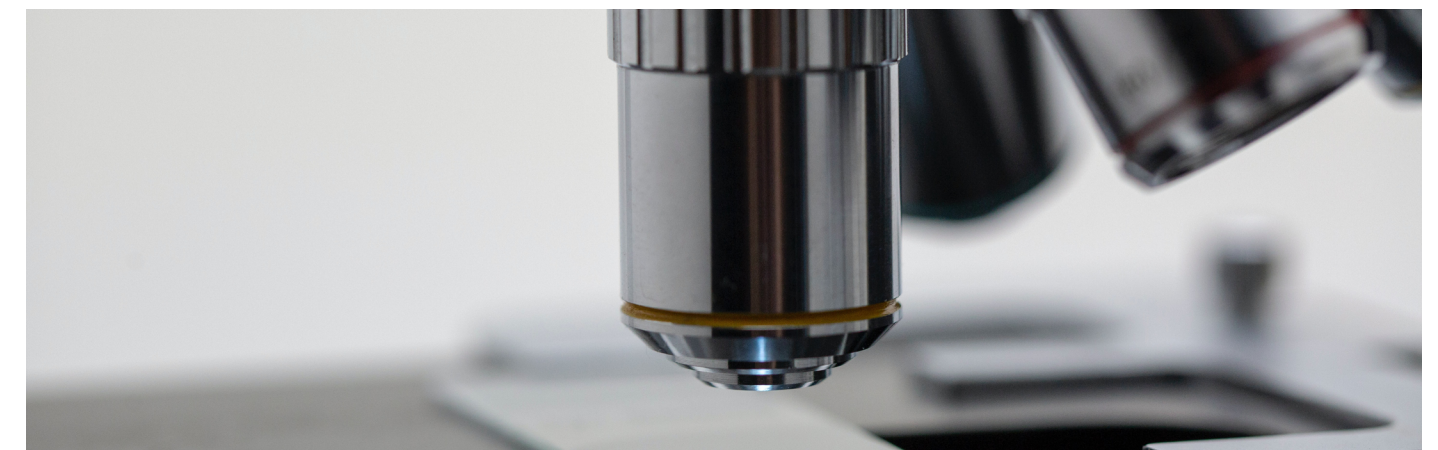
### Universities

The seedcorn approach is highly valued by Universities and has had a significant impact on leverage for larger grants. We expect there to be a core suite of seedcorn grants that form the basis of our direct relationship with (and across) Universities.

### Charities

There are some charities which commission research in Scotland under our two themes of neurological conditions and visual impairment. The traditional model has been that the charity commits to fund a project and then applies to us to backfill the costs. For the vast majority, these are projects that will go ahead regardless of whether or not we make a contribution.

In order for us to have more meaningful engagement with the research charities, we will make them aware of our priorities and encourage applications that address them. We will be open to flexible and innovative ways of using our funding.





# OUR FUNDING PROGRAMMES

Subject to an annual review of our investment performance, we anticipate awarding £3m of grant funding each year.

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

	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	For charities whose work is fully aligned to one of our funding themes, we are happy to assess applications for core funding.
Strategic Grants	Up to £150,000	Up to 3 years	By invitation – information will be available on the website	Likely to be for projects that involve partnership working and/or are about innovation or development.

## Small Grants

We want to maximise the value of this funding stream, to help charities achieve their objectives. Whilst many different small grant requests may come forward, we envisage funding:-

- Continued running and/or project costs for small charities who are largely volunteer led, community-based initiatives who may have one or two part time staff members
- Specific one-off pieces of work which can enhance the work of the charity, such as a capital investment, the development of partnership work, a service evaluation

Applications will show how this fits within the Trust’s funding themes, and if there is further information required we will discuss this with charities to promote open conversations. We will endeavour to make decision making and grant administration efficient to ensure awards reach the beneficiaries without delay.

The smallest of charities will be given flexibility in their application and reporting, in recognition of their capacity. Further, we recognise reporting for projects may focus on outputs rather than demonstrating impact for beneficiaries.

## Main Grants

This will continue to be where the majority of grant funding is awarded, and we will have two rounds each year, with applications from eligible charities being considered each spring and autumn. Assessment will consider alignment with our thematic priorities as well as the relative merits of each proposal.

Grants will be awarded to projects, capital costs and for charities working wholly within our objects, core costs (unrestricted funding). In recognition of our commitment to working relationally, most grants are expected to be for three, sometimes two years, with a report at the end of each year so we can discuss progress and learning. We will remain open to match funding a piece of work if helpful. Through the course of each grant, a Grant and Relationship Manager will provide advice and guidance, and promote collaborative opportunities within our network where relevant.

To date, our average award size has been around £36,000 for the life of each Main Grant. Over the next three years, the Trust expects to make a greater contribution to our successful Main Grant applicants, with an average award size of around £50,000 should the applicant require this level of funding and feels the Trust can make a meaningful contribution to their work. For smaller charities or for projects where costs are lower, we remain very happy to assess applications in the Main Grants programme for a lesser amount.

## Strategic Grants

The Trust has been an enabling partner to a small number of charities in recent years, offering strategic funding which has provided each with a ‘lever’ to develop, and we have seen encouraging evidence which has demonstrated the value of this approach. The grants have allowed charities to have a stronger voice with statutory agencies, to evidence the value of their pioneering practice and to move into a strong influencing position as a result of their grants.

We will continue to invite conversations within our funding portfolio to develop ideas and raise aspiration, some of which will develop to a point where we invite the charity to consider putting forward a request for our strategic funding.

We have also learned about the very strong impact of our seedcorn funding within our medical research grants. Working on principles of trust, empowerment and early investment, in the next strategic period to 2025, the Trust would like to pilot how these principles could translate to a charity beneficiary working within the ‘care and welfare’ element of our objects. We will start conversations with those we think could maximise the impact for their beneficiaries with a grant of this nature. In time, a small portfolio of charities in receipt of a ‘cascade/allocate’ grant will help us see the collective impact of this model and to promote collaboration and idea generation for those in receipt of the grants.

## Digital and Innovative Models

We recognise that the restrictions brought about by the pandemic allowed many charities to think in new ways about how they establish and/or maintain vital contact with their beneficiaries. As a result, the pace of change around, and acceptance, of new service delivery models, has been accelerated as a result. This includes, but is not limited to, digital engagement. With the easing of lockdown, we saw many services welcome a return to in-person service delivery, but with digital operations often set to continue in some form. This may be as applicable to internal operations (governance, staff working) as it is within service delivery. In any of our grant programmes, the Trustees are keen to hear from charities seeking funding to support digital or other innovative advancement, and to work collaboratively with other funders or agencies to promote new ways of working.

## RNLI

The RNLI is the only one of the charities specifically mentioned in our Trust Deed which does not specifically work within one of our funding themes. In recognition, for the Strategic Period 2022-25 we will work with the organisation to assess opportunities to establish a funding model which contributes to, and reports on, its work in Scotland. This too will be based on principles of relationship and impact.

## COLLABORATION AND ADDING VALUE

The collaborative space the Trust can bring to each funded relationship is an important one, as we recognise the importance of providing space for charities to share, learn and develop. Our Capacity Building Programme will continue to offer a programme of support, including:

- learning and upskilling in areas critical to good practice in the third sector
- different programmes which will promote strong and effective leadership
- opportunities to think about organisational sustainability
- space to meet other Trust funded charities and share learning and insight about what's working
- access to Trust meeting rooms

Wherever possible, the programme will work iteratively, with content and format being led by the needs of those we are funding.



## REFLECTING ON OUR PROGRESS

We are keen to maximise the value of our funding opportunities and so will review progress made each year by:-

- Considering our giving trends and associated analysis
- Speaking with our charity beneficiaries and associated stakeholders
- Reviewing the 'lessons learned' part of our grant report to track issues affecting those we fund
- Maintaining an open and collaborative dialogue with other funders
- Monitoring and reviewing our governance and investment performance

Collectively, this activity will ensure that we remain attuned to the factors impacting on those that we fund, and on our Trust and will be able to adjust any elements of our strategy as required.



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## CONCLUSION

The RS Macdonald Charitable Trust has a well-established history of providing grants to charities working within our funding themes across Scotland. In recent years we have seen the value of having open dialogue with those interested in our funding, and those in receipt of it. We are keen to continue to work in this way and to use what we hear to help us develop and refine our programmes and processes in our strategic period 2022-25. With ambition for the sector, we will utilise each of our grant programmes to promote the very best charitable activities; to develop and trial new ways of working; to fund critical research and to embrace collaborative opportunities. We hope in doing so we continue to be a thoughtful and engaging grant maker who enables charities to deliver the very best of services.

