THE
RS MACDONALD
CHARITABLE TRUST

STRATEGY 2025 - 29

CONTENTS

1.	Introduction	3
2.	Mission and Values	4
3.	Looking Forward	4
4.	Our Thematic Priorities	5
5.	Our Funding Programmes	8
6.	Collaboration and Adding Value	10
7.	Reflecting On Our Progress	11
Conclusion		11

01

INTRODUCTION

The launch of this new strategic period recognises the very testing climate for the third sector working in Scotland – one of high levels of need within communities alongside growing financial constraints. Despite this, there is a continued determination and aspiration within so many charities to deliver impactful services to bring benefit to those living in Scotland.

Considering how we can bring a valued funding offer to our applicants, we have retained our ongoing ambitions to:

- Provide funding over a meaningful period
- Ensure the vibrancy of the sector can be considered at application stage meaning we will not restrict applicants according to size or level of reserves
- Give clarity within our funding themes to help those considering an application
- Lift the value of grants and seek new areas in which to invest strategically
- Remain approachable and supportive over the life of a funding relationship

Bringing this together we hope to retain meaningful and impactful funding relationships which can help the sector step up to the challenges, and opportunities, ahead of them.

02

MISSION AND VALUES

Our Mission will remain "to support our beneficiary charities to achieve their purpose" and to provide a welcoming environment that is positive, encouraging, and helps beneficiaries to be better in delivering their aims. We have a continued approach to build relationships at every stage of our grant making process.

>> *"To support our beneficiary charities to achieve their purpose"*

We seek to demonstrate our core values in all that we do:

Compassionate

We care about the needs of the charities that we fund, we value their work and will take action to help.

Open

We make authentic connections, interact positively and have an open door for those who we speak with.

Stewardship

We take care in the management and allocation of resources.

Enabling

We are here to help other charitable organisations achieve their aim.

03

LOOKING FORWARD

We will retain our ongoing commitment to fund requests in each of our funding themes and to run three grant programmes to ensure our offer can meet the differing needs across the sector. As we have a portfolio of existing awardees, we are fortunate in having a 'listening ear' into the sector alongside connections with other funders and stakeholders within philanthropy. This will ensure we retain flexibility to review our proposed structure throughout the next three years and to continue to shape it according to the emerging needs of the sector.

04

OUR THEMATIC PRIORITIES

The RS Macdonald Charitable Trust grants to registered charities who are supporting those residing 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

We receive and assess requests across four areas and within this strategic period have a continued focus on funding excellent practice, whether this is to allow the continuation of evidenced models or to trial new ways of working. Across these themes, the Trust will not normally be looking to assess applications for campaigning work.

Our assessment will consider the funding proposal alongside the governance and financial health of the charity. We do not have any financial thresholds for applicants and are open to all eligible applicants irrespective of turnover and level of reserves held.

Neurological Conditions (NC)

We seek to make awards for work where the focus of the work is to offer care and support to those living with a neurological condition, and this is a referral criteria for engagement. Clarity over whether the individuals are medically diagnosed, awaiting diagnosis, or who do not seek diagnosis would be helpful as this will form part of our assessment.

Applicants will need to demonstrate how their work is aligned to supporting those living with neurological conditions using the WHO definition. For projects supporting those with a learning disability applicants should explain how their work is linked to these conditions. See also article here.

Low incidence conditions, rurality and other situations where there is limited service provision will be given some element of priority.

Exclusions
We will not assess or award to applications relating to those neuropsychiatric illnesses traditionally treated through psychiatric services (e.g. Schizophrenia, Depression, OCD, ASN (as a standalone 'category') or for Covid-, Fatigue- and Cancer-related illness.

Within the TCAN theme the Trust will consider applications for charitable activity that will support children and young people under 18 who have been, or who are at risk of being, abused or neglected. We retain our focus on therapeutic and professionally developed models of support which address needs such as those arising from domestic violence in the household, substance misuse or sexual exploitation.

There is also a renewed focus on preventative work to help young people navigate adversity and build the resilience they will need to grow up in ever-increasingly challenging environments. We hope to hear from smaller initiatives, set up locally for marginalised families to help us fund early interventions in hard-to-reach communities. This is likely to be best-suited to small grant funding.

For organisations which represent a 'cluster' structure (in a network but individually constituted) we would be happy to trial a block grant to pilot how this reaches children who are at risk and to use the review of the trial to determine whether this becomes an established model for that group. To avoid duplication, during this trial cluster members could only access our funding through that arrangement.

We realise that some larger organisations (turnover >£10M) may apply for funding for new opportunities, and smaller ones may apply mainly for core funding. We welcome both types of funding.

Tackling Child Abuse and Neglect (TCAN)

Visual impairment (VI)

We remain open to a broad range of initiatives to help those living with sight loss and visual impairment in Scotland. This includes access to new technology and innovations to help transform lives, and also to encourage those outside of the traditional VI sector to have greater capacity to meet the needs of visually impaired people.

We also place an emphasis on low incidence conditions and any initiatives that recognise preventative approaches to sight loss.

These grants will affirm the right of animals to humane treatment, recognising the need for physical safety and to be free from mental abuse.

Grant applications will be assessed for work that will meet those needs when animals are in danger of physical and/or mental abuse and also to encourage welfare conditions to help ensure their physical and mental needs are properly met.

In relation to charitable activities seeking to conserve habitats/ the natural environment, applications must evidence the intended impact for animal welfare and how that impact would be monitored.

Animal Welfare (AW)

B. Medical Research

We will provide grant funding into academic research which is Scotland-led and which relates to neurological conditions (exclusions listed on page 5 also apply here) and visual impairment. When considering how best to allocate funds towards research, the Trust will be guided by two main principles:

Excellence

1

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

Development

2

We will invest in early career researchers in order to help grow the pool of talent working within our areas of interest. We will invest in new ideas and innovative approaches that have the potential to leverage additional funds and lead to breakthroughs.

The 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 relations with (and across) Universities. We will not look to assess applications received directly from a researcher and would expect a Development team or equivalent to lead on the relationship we hold for any grants made to a University.

Charities

There are some charities which commission research which is Scotland-led under two themes of neurological conditions and visual impairment. The traditional model is that charity commits to fund a project and applies to us to backfill the costs. For the vast majority these are projects that will go ahead regardless of whether we make a contribution.

We will look to develop our reach within medical research during the strategic period.

05

OUR FUNDING PROGRAMMES

Subject to an annual review of our investment performance, we anticipate awarding £4m of grant funding each year.

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

	Amount	Length	Application Process	Comments
Small Grants – One-off projects	Up to £20,000	No more than 1 year	Online	
Small Grants – running costs	Up to £20,000	No more than £10,000 per year	Online	This is for small, community-led voluntary organisations who want a contribution to running costs. Can apply for £20,000 in total but no more than £10,000 per year. E.g. £7,500 for 2 years E.g. £5,000 for 3 years
Main Grants	Over £20,000	Up to 3 years	Online	The total amount asked for should be up to £55,000 and structured over three years, unless the life of the project is for a lesser period.
Strategic Grants	Up to £150,000	Up to 3 years	By invitation	Likely to be for projects that involve partnership working and/or are about innovation or development.

Small Grants

Within this programme we wish to see applications for:-

- Continued running and/or project costs for small charities who are largely volunteer led, community-based initiatives
- 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 years, sometimes two, 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 we will provide advice and guidance, and promote collaborative opportunities within our network where relevant.

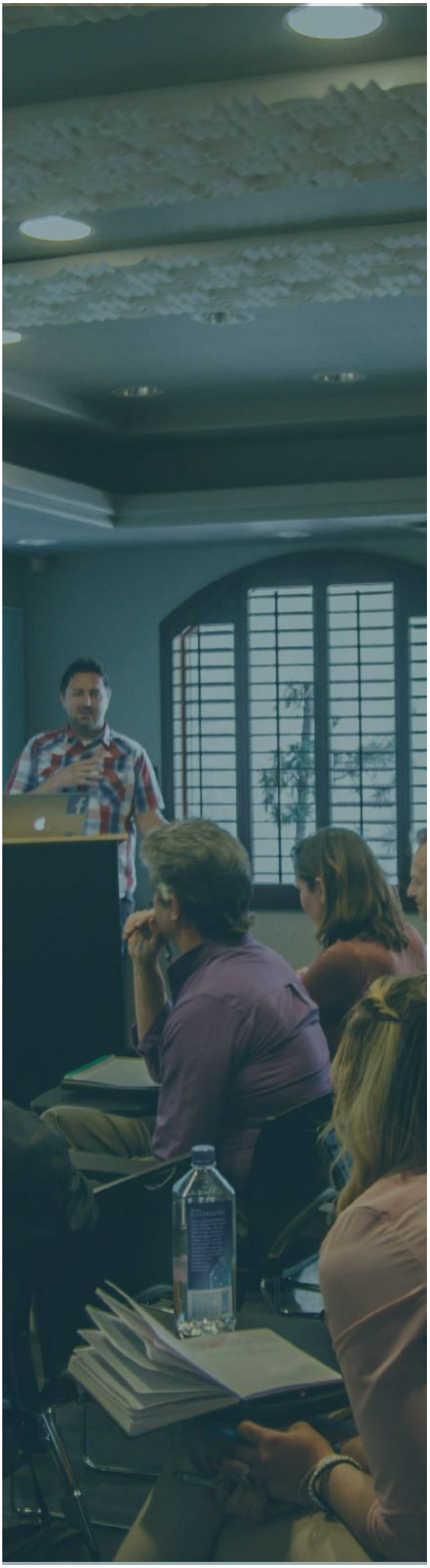
Over the next three years, the Trust expects to offer Main Grants with an average award size of around £50,000-55,000 should the applicant require this level of funding, and this value should spread over three years e.g. £17,000 per year. For smaller charities or for projects where costs are lower, we remain very happy to assess applications in the Main Grants programme for a lesser amount. Within Care and Welfare themes we anticipate awarding a similar number of Main Grants as we have in the strategic period 22-25, but understand the need to review this annually and deploy flexibility across our programmes as required.

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 relationship. The grants have allowed charities to evidence the value of their pioneering practice and to move into a strong influencing position as a result of their grants.

This is an area in which the Trust will develop greater capacity to provide further funding in coming years. It will continue to be through an invitation process, with an expectation charities will go through a more iterative process with us to develop their proposal before assessment. We will deploy a more detailed monitoring relationship so that we can work alongside the awardees, and partners, to identify how results will be optimised and what we can do to support that process.

Key elements within this programme will include looking at systems rather than isolated projects, working to evidence the value of a new model or scaling up of a model and embedding new partners to add value to the sector. Digitisation/AI continues to be an area of interest. The ongoing sustainability of this type of development will be a significant factor in our assessment of the proposals considered.



06

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.

07

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 within the sector more widely and will be able to adjust any elements of our strategy as required.

CONCLUSION

We hope that the strategy is both a continuation of our funding model, which has worked well over recent years, and an expression of ambition for growth in areas we know have the potential to solve problems differently for those affected by our charitable causes. Our grant-making and wider support will engineer change for some, and offer much needed continuity for others, at a time when there is so clearly a need for both.

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