



THE
RS MACDONALD
CHARITABLE TRUST

STRATEGIC PLAN- SUMMARY

2017-2020

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Introduction

This three year plan for 2017 – 2020 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 for this plan and the guide for its implementation. This approach has been exemplified in the process of developing and agreeing the plan itself.

During 2016, we worked with NPC to listen to those people most closely involved with the delivery of the charities we fund. They helped us to identify priority needs, priority solutions and the ways in which the Trust can best help them to meet those needs. The reports will enable the Trust to make better decisions about grant applications and they have also opened up new conversations and relationships with other organisations.

The process with NPC has reinforced our belief that we will be better able to support charities if we know them and understand them better. The report also led us to conclude that charities will be better able to deliver their purpose if they work effectively with others.

Therefore, over the next three years the Trust's strategic priorities will be to:

- build relationships with the charities we support
- support charities to collaborate

During 2014-2017 we revised our investment strategy and consolidated our application and assessment processes. This provides a solid platform from which to deliver the core operations of the Trust – grant making and other types of support. Over the next three years we plan to increase the value of grants that are awarded each year, and to continually explore other ways of supporting charities. 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.

Over the next three years the success of the Trust will be measured by the depth of our relationships with charities, and evidence of charities working more effectively with each other. During that period we will celebrate the 40th anniversary of the Trust which will be a good opportunity to reflect on the past impact of the Trust, as well as looking forward to the opportunities that are to come.

The process of developing this plan has lifted the level of expectation that charities have of us, and we are committed to ensuring that we deliver over the next three years.

Douglas Hamilton, Director

May 2017

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 and the way in which we do our business. We are keen to retain personal contact in the way that we deal with our applicants whilst at the same time maintaining a professional approach.

When we have awarded grants to organisations we take an active interest in them and the activities that 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 that the RS Macdonald Charitable Trust will 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 2017 - 2020

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 application process and during the lifetime of the grant award.

This relational approach is already expressed in the ethos of the Trust, and we will build on the approach that has been developed over previous years. 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 also recognise that building relationships requires time and resource and this will need to be factored in to future staffing needs.

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. This was a very clear message from the NPC research, where charities were telling us that we should be encouraging collaboration and that we are well placed to bring people together, and provide the resources to support effective joint working.

There are many opportunities for the Trust to fulfil this role – from informal introductions and sharing of information through to funding partnership working and supporting mergers. 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 2017 – 2020

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 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 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 current model of funding has two completely separate routes – one for Universities and one for Charities. It is proposed that we retain this structure but that we will be more proactive in establishing connections between the two strands of funding.

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. The Trust is also well placed to help researchers connect with charities that provide care and welfare services.

Grants programme

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

- Small grants
- Main Grants
- Strategic Grants

The level of what constitutes a 'small grant' is to be increased from £10,000 to £15,000.

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 continue to be required on an annual basis and a programme of monitoring visits will be implemented.

Information about strategic awards will be made available on our website to encourage charities to contact us with ideas. 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 £200,000	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 taking a project to scale in other parts of Scotland.

Spending targets

Since 2014, the Trust has met its target of awarding £2 million a year in grants. It has been agreed that the Trust should review its giving target every 3 years to take account of the value of investments, and increase or decrease the amount in line with the Trust's investment strategy.

Assessment of the current level of investments indicates that the Trust should set a target for awarding £3million a year over the next three years. However, it is recognised that this is a significant increase from the current target and that this may be difficult to achieve in the first year of the strategy. Furthermore, this target will be reviewed each year to take account of any significant market changes.

Large charities

In the development of this strategic plan, questions were raised about the extent to which the Trust should be accepting applications and providing grants to large charities. The same concerns also apply to charities with lower levels of income but with significant reserves. Many of these charities are able to raise funds from a wide range of sources and are less likely to be reliant on the RS Macdonald Trust in order for a particular project to go ahead. However, it is also recognised that larger charities have strengths that can help the Trust to deliver on our strategic and thematic priorities. Some of these charities are able to make use of their status, networks and operational structure to achieve outcomes that other charities cannot do.

Revised external guidance for applicants will therefore state that the Trust will take account of a charity's level of reserves when assessing their application, but will not set any defined limits that would prevent their application from being considered.

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. We will explore options for access to be available during non-working hours, and for maximising the use of the space so that both rooms can be used at the same time.*
- Training
 - o *The existing partnerships with CPAG, Evaluation Support Scotland and Third Sector Lab will be reviewed on an annual basis. Opportunities will also be explored for training that the Trust may be able to access through some of our own networks and professional advisers. An overall review of the capacity building programme will be completed by the end of 2018.*
- Networking
 - o *A programme of networking events will be developed that links to thematic priorities and on topics that are identified by beneficiary charities.*