

**2011** Review



**SUPPORTING  
COMMUNITIES**  
across Scotland

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## Message from the Chair

I am delighted to report a successful year for the Foundation where, in our first full year, we have provided almost £1.4m of funding to over 400 charities across Scotland through our Small Grants Programme and Matched Giving Programme. Both programmes have exceeded expectations enabling thousands of people to benefit.

The climate we are operating in remains difficult and our work in Scotland would not be possible without funding from Lloyds Banking Group. The Foundation would like to thank the Group for its support which enables us to make a genuine, tangible difference to individuals and their communities.

The Trustees and the team look forward to 2012 and with their ongoing hard work and enthusiasm I am sure it will be another good year.



**Kate Guthrie**  
Chair  
Bank of Scotland Foundation





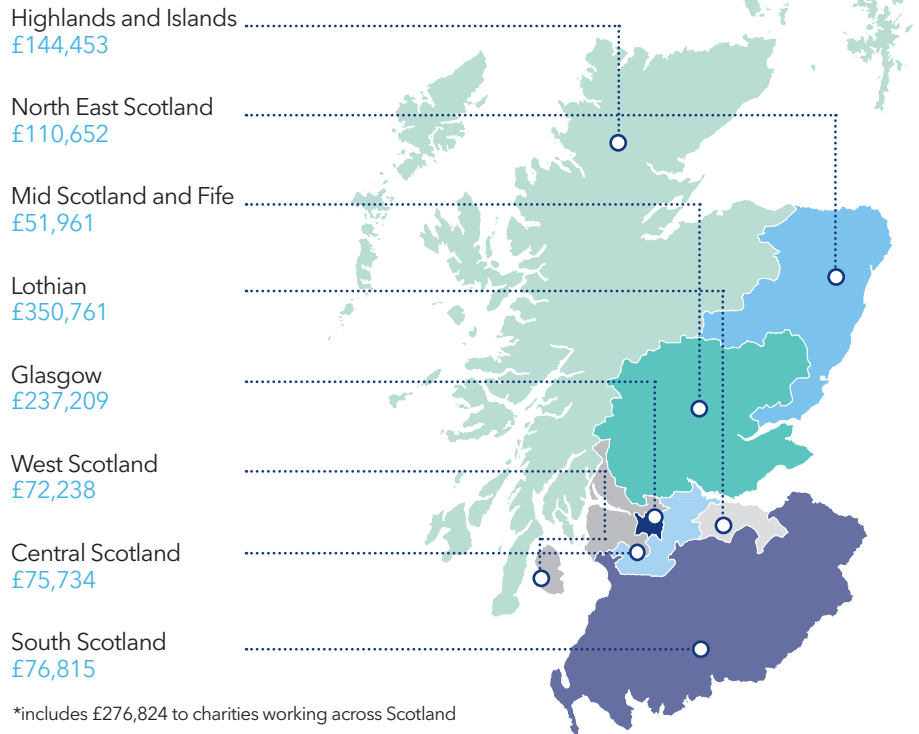
# Supporting Communities

The Bank of Scotland Foundation is an independent charity supporting people and their local communities across Scotland. We receive an annual donation of £1m from Lloyds Banking Group to fund our Small Grants Programme and

Matched Giving Programme.

In 2011, we provided almost £1.4m\* of funding to charities.

Breakdown of Grants and Matched Giving by Registered Region of Charity  
Year ended 31 December 2011



## Case Study Mearns and Coastal Healthy Living Network

Older people can often become isolated and excluded in communities. In South Aberdeenshire, Mearns and Coastal Healthy Living Network have developed a series of activities and services for older people to ensure they can remain engaged with local people and local services.

Our grant of £9,000 assisted with the Independent Living Project which helped almost 60 older people benefit from the Shopping Service, Transport Service and Handyperson Scheme. With the support of 30 volunteers, the project is reducing social isolation, improving the diet and fitness of older people and enabling older people to live longer in their own homes.



# Small Grants Programme

## Making a difference

Our Small Grants Programme provides funding to local, regional and national charities across Scotland. We aim to help with developing and improving local communities and financial literacy and financial inclusion.

### Support where it matters

We run a straightforward grant process and are one of few grant makers to provide support towards much needed core costs. At a time when charities continue to face uncertainty and change, our funding helps charities to focus on providing their valued services.

### Helping with financial sustainability

A number of charities have seen increased access to funding as a result of receiving support from us in 2011. Having various income sources can help to provide financial sustainability for charities in the long term.

### Addressing disadvantage

In 2011, £912,840 was invested in 102 charities through the Small Grants Programme. Many charities working in Scotland's most deprived areas have received support, making a significant difference to the communities that need it most.



## Case Study Home-Start East Fife

Families with children under five years of age can find life difficult at times. It often helps to have someone who is able to share these difficulties and listen to what they have to say.

Home-Start East Fife was set up to offer families this kind of support through recruiting and training volunteers with parenting experience.

Our grant of £2,970 assisted Home-Start East Fife with running costs for Family Support Groups in St Andrews and Cupar. Run by staff and volunteers, the Groups offered practical assistance for almost forty families and helped to prevent family breakdown or crisis.



# Matched Giving Programme

## Supporting colleague community engagement

Our Matched Giving Programme encourages Lloyds Banking Group colleagues to become active in their community by providing Matched Giving for their charitable fundraising efforts and time given to charities - up to £1,000 per colleague per year.

In 2011, there were over 1,250 claims from colleagues and over 320 charities shared £483,807. Many were smaller, lesser known charities where our funding makes a real difference.

### Volunteering

- 198 claims were made by colleagues who volunteered their time
- 15,989 hours were matched
- £82,823 was given to charities by the Foundation

### Fundraising

- 1,061 claims were made by colleagues fundraising for charities
- £400,984 was given to charities by the Foundation

### Top Five Charities Supported

- Save the Children
- Cancer Research
- Children's Hospice Association Scotland (CHAS)
- Breast Cancer Care
- Macmillan Cancer Support

## Case Study Waverley Care

Waverley Care is Scotland's leading charity providing care and support to people living with HIV and Hepatitis C, and to their partners, families and carers. As part of their work they also strive to raise awareness of these conditions and their prevention. Our grant of £20,000 was used towards the salary of an Advocacy & Information Worker who gave 488 one-to-one support sessions to almost 80 individuals. As well as broad-based advice on financial matters, the Worker also provided support in the areas of testing and treatments for HIV and Hepatitis C. The advice resulted in a variety of positive outcomes for individuals such as improved mental health, reduced social isolation and increased self-esteem.

In addition to our Small Grant, Waverley Care benefited from funding from our Matched Giving Programme. Lloyds Banking Group colleagues claimed £8,695 from the Foundation as a result of their fundraising and volunteering efforts which included holding dress-down days and bucket-shaking during the Edinburgh Fringe and volunteering with various projects such as decorating and gardening at Waverley Care's residential unit and installing a pond in their allotment. Matched Giving funding is unrestricted meaning charities can use it where it is needed most. Waverley Care used their Matched Giving to help fund their one-to-one and group support in Edinburgh.

# 2012 and Beyond

## Responding to needs

Our aim for 2012 and beyond is to continue to be a funder that is responsive to the needs of communities and as a result we will be launching an innovative new funding programme in June 2012 – our Volunteering Grants Programme.

Working closely with Lloyds Banking Group, the Foundation will provide charities in Scotland with the opportunity to obtain funding to support projects delivered through volunteers and in turn, the Group will aim to engage colleagues in volunteering to deliver the projects.

This combination of funding and colleague volunteers puts us in an exceptional position where we can provide significant benefits for charities beyond funding alone.

## Evaluation

Now that we are in to our second year of funding, our Evaluation Process will begin. All charities that have received a grant from us will be asked to complete an Evaluation Form as we are keen to gather baseline information and find out how our funding has benefited charities. We will also ask charities for their views on our service and how it could be improved.

## Communication

Our redesigned website will launch in June 2012.

The website features new and improved content with online grant application forms, an online eligibility test and a searchable database where grants that we have made can be easily viewed.

Our website will also feature the closing dates for our grants programmes and our latest news.

Please visit  
[www.bankofscotlandfoundation.org](http://www.bankofscotlandfoundation.org)  
 for more information.

# Trustees

## Kate Guthrie

Foundation Chair and Trustee since December 2010, Kate is the Human Resources Director for Insurance at Lloyds Banking Group.

## Jim Coyle

Trustee since June 2010, Jim is Divisional Finance Director for Group Operations at Lloyds Banking Group.

## Sarah Deas

Trustee since July 2011, Sarah is Chief Executive of Co-operative Development Scotland, a subsidiary of Scottish Enterprise.

## Alasdair Gardner

Trustee since December 2010, Alasdair is Regional Managing Director, Mid Markets Scotland at Lloyds Banking Group.

## Paul Grice

Trustee since August 2011, Paul is Clerk and Chief Executive of the Scottish Parliament.

## Peter Navin

Trustee since December 2010, Peter is Chief Executive of Lloyds TSB Scotland and Branch Network Director of the Verde business within Lloyds Banking Group.

Staff

## Jillian Baillie Head

## Scott James Finance and Grants Manager

## Denise Paton Project Co-ordinator

## Cover Case Study SEAL Community Health Project

South East Area Lifestyle Community Health Project aims to reduce inequalities and ensure access to a healthy lifestyle for all residents in the Gorbals and Govanhill area of Glasgow, particularly those on low incomes and those isolated or excluded in the area.

Our grant of £8,000 funded two Fruit Barras for one year which provide good nutritious food, at cost price, directly into deprived areas where shops can be expensive and difficult to reach without transport. Manned by local volunteers, over 500 people use the Fruit Barras which provide a vibrant place for local people to gather and interact. As well as encouraging a healthy lifestyle, the Barras have improved overall social and community engagement.

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