

September 2019

 BANK OF SCOTLAND  
Foundation

# HELPING SCOTLAND PROSPER WITH LLOYDS BANKING GROUP

With an annual donation from Lloyds Banking Group, Bank of Scotland Foundation has been Helping Scotland Prosper since 2010, funding charities across Scotland through Grants Programmes and a Matched Giving Programme for Lloyds Banking Group employees in Scotland.

As our annual donation increased to almost £5m in February 2019, we took the opportunity to rethink our approach to how we invest and become a more flexible grant maker by tailoring our programmes to the needs of those we support. Our resulting new strategy, 'Supporting Positive Change Across Scotland', was officially launched on 17 September 2019.

## Parliamentary Reception 2019

On Tuesday 17 September 2019, more than 200 guests joined Philip Grant, Chair of the Foundation and Jackson Carlaw MSP to hear more about the Foundation's new strategy and the increased funding available to charities across Scotland. It was fantastic to see a great mix of charity representatives, MSPs and Lloyds Banking Group colleagues attend and hear how the Foundation's funding and mentoring programmes are making a difference to so many charities and their communities.

There was a great deal of interest in our new funding programmes, with many charities highlighting their ongoing need for support with core costs. We understand this financial pressure and are proud to be one of the few funders who will continue to cover core costs such as salaries and rent.



## Grants programmes now open

With Scottish charities facing an increasingly challenging funding environment, we will continue to provide stability for small and medium sized charities who are aiming to make positive and lasting change.

Four new programmes will launch during 2019/early 2020 and to ensure funding is reaching the most vulnerable people across Scotland, charities we support must demonstrate in their application that they address disadvantage or social exclusion. Targeting our funding in this way will help us to provide people with opportunity and equality and make positive, sustainable change.



### Reach

Reach will make positive and lasting change in communities across Scotland. Charities with an **income of £1m or less can apply for £1,000-£20,000 over one year** to support people through varying stages of their lives.

**Open to applications  
19 Aug 2019 - 1 Oct 2019  
and quarterly thereafter**



### Change

Change will have a large-scale, long-term, positive impact on charities and communities. Charities with an **income of £500k or more can apply for capital costs or project costs of £50,000-£100,000 per annum over 1-2 years** to ensure they can provide continued, reliable support for people across Scotland.

**Open to applications  
2 Sep 2019 - 25 Sep 2019  
and annually thereafter**



### Advise

Advise will improve Financial Advice and Financial Literacy for people across Scotland. Charities with an **income of £1m or less can apply for £1,000-£20,000 over one year** to enable people to develop their financial skills and access the support they need to take greater control of their lives.

**Launching early 2020**



### Invest

Invest will put charities in a more stable position. Charities with an **income of £1m or less can apply for core costs of £20,000-£40,000 per annum over 2-5 years** to relieve the pressures they face of financial uncertainty and increased demand.

**Launching early 2020**



News Flash

First Change closing date:  
**10am Wednesday  
25 September 2019**

First Reach closing date:  
**12 noon Tuesday  
1 October 2019**

## Lloyds Banking Group

**We're proud of our partnership with Lloyds Banking Group and also its employees across Scotland who, thanks to their generosity, enable us to support charities in many more ways than funding alone.**

Our Matched Giving Programme encourages Lloyds Banking Group employees across Scotland to become active in their communities and support charities through fundraising and volunteering. It's fantastic that so many employees give up their time to support charities and use our programme to increase their donations further. During 2018 alone, our Matched Giving Programme received 1,954 claims from Lloyds Banking Group employees, distributing £741,472 to 548 charities supporting communities working across Scotland. As a result of 344 of those claims, Lloyds Banking Group's Charity of the Year, Mental Health UK, received £104,578 from Bank of Scotland Foundation's Matched Giving Programme thanks to employees

undertaking a variety of fundraising and volunteering activities throughout 2018.

By harnessing the huge talent, energy and commitment of the Group's employees over the last year, our charity mentoring programme - Enhance - has been matching charities with Lloyds Banking Group employee mentors, based on strategic areas they specifically need support with. Enhance enables charities to draw on the skills and experience of the Group's business professionals, whether it's using them as a sounding board for ideas, identifying new challenges or helping plan a strategy. To date we have successfully matched 25 charities with mentors, some of which, due to the location of the charity, are remote mentoring partnerships. The success of this programme is thanks to the colleagues who have registered to become a mentor and we look forward to continuing to offer Enhance to the charities that we fund each year.

## A word from our Chair



As Chair of the Foundation's Board of Trustees, I am proud of the ambitious strategy we've developed and we very much look forward to welcoming applications for

Reach and Change, the first of our new funding programmes. This is an exciting and significant moment in the history of Bank of Scotland Foundation and I am hugely grateful to our sole funder, Lloyds Banking Group, for our continued funding which has enabled us to tailor a range of new funding programmes that will reach those where the need is greatest.

**Philip Grant**, Chair

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