

MARKING 10 YEARS

SUPPORTING SCOTLAND'S CHARITIES

Since Bank of Scotland Foundation launched on 10th November 2010, our funding has helped to improve the lives of thousands of people across Scotland, addressing areas such as unemployment, poverty, digital inclusion, mental health and homelessness in some of Scotland's most deprived areas.

In March 2019, we announced our new five-year strategic plan, 'Supporting Positive Change Across Scotland', including details of our new funding programmes, which were created specifically to make positive and lasting change in communities.

Since August 2019, we have awarded over £4.7m of grant funding to 230 charities across Scotland enabling some of Scotland's

most vulnerable people to benefit from a variety of much needed local services and personal support.

As the Covid-19 pandemic continues to impact the Third Sector and the demand from charities for funding continues to increase, we are delighted that our sole funder, Lloyds Banking Group, has confirmed that we will receive a donation of almost £5m in 2021.

We are very proud of our partnership with the Group and hugely grateful for our annual donation. Their early funding commitment has provided us with much needed security and certainty and has enabled us to confidently plan the ways that we will support charities throughout 2021.



At a glance
figures
Since 2010...

Awarded over
£21m
to charities

Over
£14.6m
grants

Over
£6.67m
Matched Giving

Over
2,200
charities

and over
800,000
people



MARKING 10 YEARS OF SUPPORTING CHARITIES ACROSS SCOTLAND

To mark our 10th anniversary, we are pleased to announce that the first six months of 2021 will see over £2.5m of funding distributed to charities across Scotland through our Reach and Invest Grant programmes.

We understand that charities are facing unprecedented financial pressure, combined with a significant increase in demand for services. The loss of major fundraising events has cost organisations millions of

pounds and donations are being made by the public in smaller quantities.

We are keen to ensure that our funding continues to support as many communities as possible through the difficult winter months and in order to do this, our broadened eligibility criteria for Reach will continue until at least June 2021, meaning charities with an income of £1.5m or less can still apply for funding.

Invest will launch for a second year in March 2021, but with a new theme; 'Supporting financial vulnerability'. Any charity with an annual income of between £100,000 and £1m and who are either a financial vulnerability charity or one that has projects addressing financial vulnerability, are eligible to apply for up to five years of funding. This could include for example charities or projects addressing poverty, unemployment, debt or loss of income or those providing financial advice and assisting with financial literacy.

2020/2021 Grant Programmes

Programme	Opens to applications	Closes to applications	Grants awarded
 Reach	12 noon Mon 23 Nov 2020	12 noon Thu 26 Nov 2020	Mid-Jan 2021
 Reach	12 noon Mon 25 Jan 2021	12 noon Thu 28 Jan 2021	Mid-Mar 2021
 Invest	12 noon Mon 22 Mar 2021	12 noon Thu 1 April 2021	Mid-Jun 2021
 Reach	12 noon Tue 1 Jun 2021	12 noon Fri 4 June 2021	Mid-Jul 2021

OUR COVID-19 RESPONSE

In response to the increasing financial challenges that charities were facing due to Covid-19, we established a Contingency Fund in April 2020 for current grantees.

In all, 153 charities were contacted and offered a contingency award of 20% of their current grant value. This award could be used to continue to carry out the original purpose of their grant, or if this was not possible, as a contribution to their general costs. Every charity accepted our offer, enabling us to award a total of £677,421.

The determination of the charities we support has been inspiring as they have responded flexibly, innovatively and sensitively to the crisis, redesigning support programmes to help tackle a range of issues, from loneliness and isolation, to financial problems and food poverty.

They have faced many challenges, not only in providing services to those in need, but also coping with the pressures of some of their own staff and volunteers having to give up their roles to shield for months, impacting their ability to support their communities.

The Trustees and Foundation team responded swiftly to the pandemic ensuring charities could start to make use of their additional awards just as the real impact of the crisis became evident. The overwhelming positive feedback and thanks that we have received from charities for our early action has been quite humbling.

#supportingscotland



SUPPORTING MENTAL HEALTH

Mental health support has always been prevalent in many of the applications we receive and so in 2018 we launched our Mental Health Fund, a stand-alone programme aimed at helping to improve the quality of life of people experiencing mental health conditions.

The level of demand we encountered was remarkable, demonstrating just how many people require mental health support across Scotland. Twenty-eight charities shared over £350k through

this programme and such was the need for financial support for mental health projects, the fund was launched once more in 2019.

This time twenty charities shared over £267,756 with funding used to improve financial inclusion for those with mental health issues, contribute towards the costs of many counsellors and various forms of creative therapies as well as enable charities to expand their services to offer more support to those in need.

Total 48 grants

£624,229

2018: 28 grants

£356,473

2019: 20 grants

£267,756

LLOYDS BANKING GROUP COLLEAGUES

Matched Giving

Our Matched Giving programme is a valuable source of income for charities as Group colleagues can claim up to £1,000 per calendar year for eligible charities. We will match up to £500 of colleague fundraising activities and donate £8 to the charity for every hour of voluntary time a colleague has given, to a maximum of £500.

With the devastating impact Covid-19 has had on charity fundraising events, it's been fantastic to see Group colleagues find innovative ways of fundraising during these difficult times. There have been claims for a wide range of initiatives, from virtual bingo and quizzes, to socially distanced walks and solo marathons.

Through the hard work and dedication of the Group's colleagues, we are proud that our Matched Giving programme can give charities a financial lifeline.



Mentoring

Our flagship Enhance Charity Mentoring Programme has been running since December 2017, offering Foundation funded charities the opportunity to register to be matched with a colleague mentor from Lloyds Banking Group. We take huge pride in creating meaningful matches - matches with long-term prospects, tailored to match colleague skill sets with charity skill sets.

We aim to match a charity with a mentor local to them so there is a better understanding of the issues faced in that area, however due to the remote location of some, we also offer remote mentoring where they are matched to a mentor elsewhere in Scotland, holding meetings by phone, online or other methods.

We have continued to get a great response to the programme, with charities across Scotland quickly signing up. To date we have successfully matched 46 charities based in locations such as Wick, Glasgow, Edinburgh and Fort William.

Since 2010
(in the last ten years)

Almost
18,000
colleague claims

Over
£6.67m
awarded

#supportingscotland



QUEEN MARGARET UNIVERSITY RESEARCH



Queen Margaret University
EDINBURGH

In September this year, the Scottish Government published their "Programme for Government" (PfG) to highlight key priority areas for 2020/2021 and the actions they are taking to ensure Scotland's economic, health and social recovery from Covid-19.

This publication coincided with the results of Foundation research commissioned with Queen Margaret University which identified through a study of our 2011-2019 awards that the Foundation has supported a variety of societal themes over the last ten years.

The five predominant themes characterising the work supported by the Foundation relate to young people, disability and long-term conditions, volunteering and volunteer support, elderly and mental health and wellbeing, all of which feature prominently in the Scottish Government's PfG, highlighting that the Foundation's funding continues to support those that are most in need across Scotland.

A WORD FROM OUR CHAIR

I am delighted to mark Bank of Scotland Foundation's 10th anniversary by announcing that charities will benefit from over £2.5m of grant funding in the first half of 2021.

Our broad-brush approach to funding has ensured we support a wide range of charities delivering projects which address various societal issues.

We have always been proud to be one of the few funders to cover core costs such as salaries and rent, knowing that without these basic needs, many charities would not be able to operate. We remain committed to this.

The guaranteed funding by Lloyds Banking Group in 2021 has never been of more value than during this critical period as it enables us to bring stability to charities over the challenging year ahead and help them meet the immediate and longer term needs of some of Scotland's most vulnerable people.

The Foundation has grown to be one of Scotland's key funders and we would not have reached this milestone without the hard work from all of those who have been part of the Foundation team and Board since 2010. I am extremely grateful to them all and am proud to be Chair during this milestone year.

Philip Grant,
Chair



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Registered charity: SC032942.
Company Limited by Guarantee: SC229825.
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