



**2013** REVIEW

**SUPPORTING  
COMMUNITIES  
ACROSS SCOTLAND**

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## Cover Case Study

### Reidvale Adventure Play Association Ltd (R.A.P.A)

**Reidvale Adventure Play Association Ltd aims to improve the lives of children and young people and their families, including those with additional support needs in a fully integrated, safe, supervised playground environment in their local community.**

The Foundation grant of £5,590 provided disadvantaged young people aged between 8-16 years with dance tuition and sport workshops, giving them new life skills and a stepping stone to potential employment.

These sessions increased confidence and self esteem and empowered more young people to become involved in their local community by providing safe, fun alternatives to being on the streets or engaging in crime, violence and anti-social behaviour.

## Message from the Chair

It gives me great pleasure to report that 2013 saw continued success across all of the Bank of Scotland Foundation programmes, with charities operating in Scotland making a significant impact on their communities through our funding.

The Matched Giving Programme received over 1,650 applications from Lloyds Banking Group employees and distributed over £675,000 to 368 charities supporting communities working across Scotland. The programme continues to provide funding to a diverse mix of local and national good causes in Scotland through the fundraising and volunteering efforts of Lloyds Banking Group employees.

Our Small Grants Programme continued to support those charities looking to develop and improve their communities or support financial inclusion and financial literacy. Over £550,000 was awarded to 69 charities in the year, providing funding to cover a range of projects from core running costs to capital projects. Our Impact Report once again provides clear evidence that the Small Grants Programme is making a tangible difference to communities across Scotland.

We were delighted to continue with the Volunteering Grants Programme, a joint initiative with Lloyds Banking Group aimed at promoting volunteering

in communities across Scotland. In 2013, ten charities shared over £100,000 for new volunteering opportunities which were shared with Lloyds Banking Group employees, allowing both the funding and manpower to bring the projects to life. The evaluation of our 2012 programme clearly demonstrates that positive change is being made through our grant awards, empowering communities to work together to make a difference.

The impact made by the charities would not be possible without the support of our sole funder, Lloyds Banking Group who donated over £1 million to the Foundation in 2013. The Trustees are delighted that this donation will increase in 2014 to £2 million which will allow for the growth of our current programmes and the launch of new programmes.

We look forward to 2014 and supporting more charities operating in Scotland and helping them to create a better future for the people and communities they serve.

**Kate Guthrie,**  
Chair, Bank of Scotland  
Foundation



# Reaching Communities Across Scotland

The Bank of Scotland Foundation is an independent charity supporting people and their local communities across Scotland. We received a donation of £1m in 2013, increasing to £2m in 2014, from Lloyds Banking Group to fund Grants Programmes and a Matched Giving Programme.

Over 700 charities across Scotland have received over £4.1m since the Foundation launched in November 2010, including over £1.3m through our programmes in 2013.

## Breakdown of Grants and Matched Giving by Registered Region of Charity

Year ended 31 December 2013

Highlands and Islands **£48,280**

North East Scotland **£69,130**

Mid Scotland and Fife **£66,190**

Lothian **£582,873**

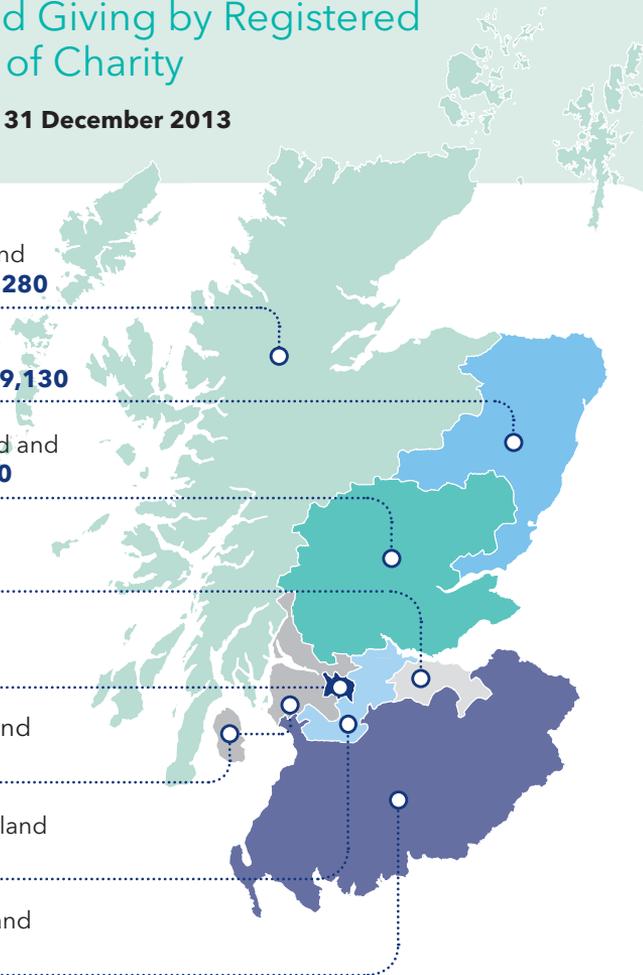
Glasgow **£231,361**

West Scotland **£57,658**

Central Scotland **£59,205**

South Scotland **£88,014**

We also provided **£131,631** to charities working across Scotland.





## Case Study

# Cancer Link Aberdeen and North (CLAN)

**CLAN aims to help and support anyone affected by cancer, whether as a patient, carer, family member or friend. With over 15,000 cancer diagnoses every year in the Grampian area, there is a real need for their services.**

Many of the services offered by CLAN are provided by over 100 support volunteers, creating an invaluable source of care and information. Our grant of £8,189 ensured that their volunteers received training to provide the best quality service that their clients need and deserve during this difficult time.

## Case Study

# Sick Kids Friends Foundation

**The Sick Kids Friends Foundation complements the work of the Royal Hospital for Sick Children in Edinburgh and the 100,000 patients that require their services each year.**

The Bank of Scotland Foundation grant of £10,000 supported the salary costs of an assistant psychologist in the Guided Self Help service. This much needed service provides support to patients and their families and empowers them to help themselves through very difficult times.

Throughout the year Lloyds Banking Group employees also

raised £17,000 for The Sick Kids Friends Foundation through their fundraising efforts, including Matched Giving from the Foundation of over £7,000.

Matched Giving funding is unrestricted, allowing charities to use it where it is needed most. The Sick Kids Friends Foundation used their Matched Giving to help support a number of projects, including welcome presents for the children, parents' accommodation and safe internet access to allow children to communicate with friends and family during their stay in hospital.

In using our funding in this way these important services helped to make the stay at hospital a little less stressful for children, young people, parents and wider families.



# Matched Giving Programme

## Supporting Community Engagement

**The Bank of Scotland Foundation Matched Giving Programme encourages Lloyds Banking Group employees across Scotland to become active in their community by providing Matched Giving of up to £1,000 per employee per year.**

In 2013, there were over 1,850 claims from employees and over 350 charities shared £675,546, an increase of 48% on 2012. The Foundation continues to support a diverse mix of charities with employees applying for Matched Giving towards small local charities or for some of Scotland's larger national charities.

## Volunteering

- 198 claims
- 16,125 hours volunteered
- £86,932 given to charities

## Fundraising

- 1,665 claims
- £588,614 given to charities

## Top Ten Charities

- Alzheimer Scotland
- Macmillan Cancer Support
- Maggies
- Marie Curie Cancer Care
- Cancer Research
- CHAS
- St Columba's Hospice
- Prostate Cancer UK
- Sick Kids Friends Foundation
- Aberlour Childcare Trust

## Bank of Scotland Foundation Support for Alzheimer Scotland

**In 2013, Lloyds Banking Group started a new two year partnership with Alzheimer's Society and Alzheimer Scotland as their Charity of the Year which has been supported by the Bank of Scotland Foundation through the Matched Giving Programme.**

Throughout the year, Lloyds Banking Group employees claimed £220,287 of Matched Giving from the Foundation which contributed to the partnership total for 2013 of over £2.4 million.

Our Matched Giving has gone towards the Live Well campaign in Scotland, which is working to improve the quality of life of people living with dementia, allowing them to live better for longer. Through the partnership with Lloyds Banking Group, Alzheimer Scotland has recruited a Live Well Officer to develop new resources and create a model of best practice to support carers.

The result of this work has been the delivery of specialist carer sessions and the creation of new innovative activities for people living with dementia across Scotland, and we look forward to supporting their work in 2014.

# Small Grants Programme

## Supporting Charities

The Bank of Scotland Foundation Small Grants Programme provides support to charities that are looking to develop and improve their communities or increase financial literacy and financial inclusion. The programme is open to all charities based in Scotland to ensure our funding reaches those who need it the most.

## Essential Funding

In 2013, £557,714 was invested in 69 charities through the Small Grants Programme. Charities applying to the Foundation are encouraged to seek funding for the areas which they feel will make the greatest impact. In the current climate, a number of charities are requiring support towards core costs and with an average grant size of £8,082 our funding is essential to maintain these much needed services.

## Helping Communities

Our funding is helping to improve the quality of life for people who are facing challenging circumstances by addressing areas such as ethnicity, disability and financial education. This support to communities who need it the most is making a real, tangible difference to thousands of people across Scotland allowing them to make a positive change to their lives.

## Evaluating Success

It is vital that funding from the Foundation is being used by charities to meet the needs of the communities in which they operate. Our Impact Report continues to demonstrate the success of the Small Grants Programme. In 2011 and 2012, funding through our Small Grants Programme was able to reach over 80,000 people in Scotland, allowing the charities we support to address the needs of the people they serve.





## Case Study

# Falkirk & District Association for Mental Health

**The Falkirk & District Association for Mental Health aims to empower, educate and enable adults with mental health problems to lead a fulfilling and participative life.**

The services provided include counselling, drop-in and befriending services to help overcome social isolation, poor mental health, abuse or bereavement. Our grant of £5,000 will help 1,000 adults access the service for the first time and be directed to the services that meet their needs.

Providing support towards the core running costs allowed Falkirk & District Association for Mental Health to reach 2,000 adults and promote their services across the region.

## Case Study

# Wiston Lodge

**Wiston Lodge is there to provide a unique rural setting where people can feel safe and be supported to develop the skills they need to fulfil their potential, free from the distractions of everyday life.**

Through the Volunteering Grants Programme, Wiston Lodge received £12,850 towards salary costs for an Outreach and Volunteer Development worker to actively engage the surrounding deprived and isolated local communities.

Our grant allowed the recruitment of almost 100 volunteers, including those from disadvantaged backgrounds, to provide support to the 4,000 people who use the facilities throughout the year. Through the recruitment of these volunteers there has been a tangible increase in the engagement of the local community, allowing more opportunities for people to reach their potential.

As part of the Volunteering Grants Programme initiative, the volunteering opportunities were shared with Lloyds Banking Group employees across Scotland to help ensure the services could be delivered.





## Volunteering Grants Programme

### Innovative Funding

Following the success of the Volunteering Grants Programme in 2012, the Foundation was delighted to continue the programme in 2013 in partnership with Lloyds Banking Group, with the aim of boosting colleague volunteering.

The Foundation provided funding to charities, to support projects delivered through new volunteering opportunities and the Group, then ensured the successful charities were given access to a network of employee volunteers to deliver the projects.

### Inspiring Communities

In 2013, over £100,000 was distributed to ten charities that will make a real difference to the lives of people and communities

through the Volunteering Grants Programme. The projects supported by the successful charities were then made available to employees of Lloyds Banking Group to provide the manpower to bring them to life.

A range of charities were supported in 2013, addressing disadvantage and exclusion across many communities in Scotland.

### Working Together

The Volunteering Grants Programme once again showed the value of working with Lloyds Banking Group to provide an innovative offering to charities in Scotland. The Trustees have agreed to run a further joint initiative programme in 2014 focusing on projects that address financial literacy and financial inclusion through volunteering.

# The Future

## Increased Funding

Our work in Scotland would not be possible without the support of our sole funder, Lloyds Banking Group. We are delighted that the Group has increased its annual donation to £2 million per annum from 2014, increasing the funding available to charities in Scotland.

## New Programmes

The increase in our funding will allow the enhancement of our existing programmes and addition of new programmes aimed at meeting the needs of charities across Scotland. The Medium Grants Programme that launched in January 2014 and a Large Grants Programme opening in late 2014 will provide a range of options to meet the needs of charities. These exciting new programmes will complement our current funding opportunities, allowing the Foundation to make an increased contribution to communities in Scotland.

## Simple Application Process

Following a full review of the feedback received from charities and the increase in funding, we are excited to be moving to an online application process in 2014. This new software will allow the Foundation to actively engage with those who apply for funding and make the process easier and more efficient for charities.





## Case Study

# Bield Housing & Care

**For over 40 years Bield Housing & Care have been providing quality housing and services for older people in Scotland. They ensure people within their care have freedom of choice and independence and are able to realise their potential as respected members of society.**

Our grant of £6,749 provided a fortnightly evening care service and regular outings for older people living with dementia who attend the Oakbank Park Day Care Centre. By providing over 25 older people with outings and regular activities, our funding also provided their carers with additional respite and allows family members and friends to share quality time together with their loved ones.

## Case Study

# Afasic Scotland

**An average of two to three children in every classroom in Scotland has difficulties with speech, language or communication.**

Afasic Scotland works with parents, professionals, local authorities and agencies across Scotland, promoting the rights, needs and aspirations of children, young people and those of their parents and carers, all whom have experience of the daily challenges that speech and language difficulties bring.

Our grant of £12,000 towards core running costs enabled Afasic Scotland to reach out to over 500 families in Scotland, providing direct support to the hundreds of requests they receive each year, and helping to significantly reduce the impact of speech impairment in children across the country.





## Trustees

### **Kate Guthrie**

HR Director,  
Culture, Capability and Engagement,  
Lloyds Banking Group

### **Jim Coyle**

Director of Scottish Affairs,  
Lloyds Banking Group

### **Sarah Deas**

Chief Executive,  
Co-operative Development Scotland

### **Alasdair Gardner**

Regional Managing Director Scotland,  
SME Banking and Mid Markets,  
Lloyds Banking Group

### **Paul Grice**

Clerk & Chief Executive of  
Scottish Parliament

### **Peter Navin**

Managing Director Branch &  
Business Banking, TSB

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## Staff

### **Scott James**

Head

### **Lorraine O'Neill**

Finance and Grants Manager

### **Denise Paton**

Matched Giving Programme  
Manager

## Grant Awards of £10,000 and Over

- Dundee International Women's Centre
- Buchan Dial-a-Community Bus
- Starter Packs Inverclyde
- Hillhouse
- Edinburgh International Science Festival (EISF)
- St. Columba's Hospice
- Home-Start Caithness
- Barnardo's Scotland
- Maggie's Keswick Jencks Cancer Caring Centres Trust (Maggies)
- Ocean Youth Trust Scotland
- Breast Cancer Care Scotland
- Sick Kids Friends Foundation
- The Lynton Centre
- Children 1st, working name of the RSSPCC
- Coatbridge Citizens Advice Bureau
- Saje Scotland LTD
- East Sutherland Citizens Advice Bureau
- Afasic Scotland
- National Youth Choir of Scotland (NYCOS)
- CKUK
- Edinburgh Headway Group
- Citizens Advice Bureau West Lothian
- Alzheimer Scotland (Forget-me-not project)

### Volunteering Grants

- Breast Cancer Care Scotland
- Royston Youth Action
- Falkirk and District Association for Mental Health
- Wiston Lodge

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