

March 2019

HELPING SCOTLAND PROSPER WITH LLOYDS BANKING GROUP

For nine years, Bank of Scotland Foundation has been Helping Scotland Prosper using an annual donation from Lloyds Banking Group to fund charities across Scotland through Grants Programmes and a Matched Giving Programme for Lloyds Banking Group employees in Scotland. The Foundation has now distributed over £14m to more than 1,800 charities making positive change across Scotland, enabling over 600,000 people to benefit from a variety of much needed local services and personal support.

In February 2019, the Foundation's annual donation from Lloyds Banking Group was almost £5m, a significant increase from the £2m received annually in previous years. To ensure this funding can be distributed to Scotland's charities effectively and efficiently, we have taken 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.

Supporting Positive Change

'Supporting Positive Change Across Scotland' is the Foundation's five-year strategic plan which will see a range of new funding programmes open in 2019 and 2020.

Four strategic aims will determine our programmes of work over the next five years:

- 1** We will focus our work and impact on charities that demonstrate they address social exclusion or disadvantage.
- 2** We will develop flexible, responsive grant making tailored to the needs of those we support.
- 3** We will realise the value of our strategic partnership with Lloyds Banking Group.
- 4** As a learning organisation we will work to improve our impact and the quality of what we do and will provide best in class customer service.

Grants Programmes

As the current funding environment in Scotland becomes increasingly challenging we will continue to provide core funding and stability for small and medium sized charities. Our current grants programmes will change from Small, Medium and Large Grants to:



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.



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.



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.



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.



News Flash

Charities have until **12 noon Thursday 4 April 2019** to submit applications for the final tranches of the Foundation's Small and Medium Grant programmes. The first of the Foundation's new programmes will launch in **August 2019**.

Disadvantage and Social Exclusion

We will focus our work and impact on charities that demonstrate they address disadvantage or social exclusion to ensure that our funding is reaching the most vulnerable people across Scotland, providing them with opportunity and equality and making positive, sustainable change.



Disadvantage

Examples include charities addressing primary disadvantage such as homelessness, abuse, mental health or poverty, or secondary disadvantage such as debt issues, learning disabilities, illiteracy, lack of employability skills or health issues.



Social Exclusion

Examples include charities addressing exclusionary challenges for minorities, people with disabilities, LGBT people, drug users, institutional care leavers, the elderly or the young.

Lloyds Banking Group

We are proud of our partnership with Lloyds Banking Group and together, beyond funding alone, we recognise that there is an opportunity to provide more support for Scotland's charities. By harnessing the huge talent, energy and commitment of the Group's employees we can also provide charities with access to mentors, volunteers and digital support to help them address the other challenges that they face. Our Matched Giving Programme, which matches the fundraising and volunteering activities of the Group's employees in Scotland, will continue as normal throughout 2019.

A word from our Chair

As Chair of the Foundation's Board of Trustees I am hugely grateful to our sole funder, Lloyds Banking Group, for our continued funding which we will use to support charities addressing disadvantage or social exclusion. Our new strategy is ambitious; our four strategic aims will be regularly reviewed and our success will be assessed against them.

As one of the few funders to cover core costs such as salaries, we understand the financial pressure charities are under and have made every effort to minimise the impact of the short period where we transition to our new programmes.

We very much look forward to launching the first of our new funding programmes in August 2019 and continuing to support the excellent work of charities in some of the most deprived areas of Scotland.

Philip Grant, Chair

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