

Flash Report

January - March 2023



Foundation
Scotland

Welcome to our Flash report for January to March 2023

It's been a busy few months at Foundation Scotland - our Trustees have been meeting in unusual circumstances, tramping around the misty hills of Arran, we've visited a salmon hatchery on the banks of the River Tay with 30 school children and an STV camera, and we've celebrated our Education and Training support reaching a million pound milestone (more of which later).

In the meantime, it's business as usual, and our experienced team continues to provide support, advice and expertise to donors, individuals, projects, and communities alike.

Our work includes supporting philanthropists to help their personal giving make the most difference in ways that matters to them, working alongside communities to ensure that local funds are distributed by communities themselves, and offering social investment opportunities to enable social enterprises, community organisations and charities to grow and deliver positive social impact. And so much more.

[You can find out more about our work here.](#)

In this Flash Report, we take a quick snapshot of the last three months, to reflect on our own work as well as that of the projects, funds and donors we work with across the country.





Spotlight on... Revitalising Trusts Project

Foundation Scotland are 'charity detectives'

Did you know there are approximately 24,000 registered charities in Scotland? From small local charities to large international organisations, many of these charities have been set up as Trusts to distribute grants or give donations where they are needed.

Charitable Trusts typically provide public benefit by making grants or donations to other charities, voluntary groups or individuals as laid out in their original constitution. However, sometimes Charitable Trusts can become 'dormant', for a variety of reasons.

For example, it can be difficult to recruit new trustees, find time to run the charity or as times change, it can be impossible to identify beneficiaries befitting the original deeds of the Trust.

Through Foundation Scotland's '**Revitalising Trusts**' project, which is being run in collaboration with the Scottish Charity Regulator (OSCR), we have discovered nearly three hundred 'dormant' Charitable Trusts across Scotland.

Launched in May 2021, the project was set up to identify Charitable Trusts that appear to be inactive and support them to reactivate.

We have already worked with twenty-eight Trusts, unlocking their funds to suit current day needs, totalling a huge £2.3 million from lost and forgotten charitable accounts.

One such Trust was the **William Stewart's Trust**. Formed in 1898 to provide for the sons of the eight Incorporated Trades of Perth, or failing that, boys with the surname Stewart, the overall purpose was to provide for their education. The William Stewart's Trust was identified by Foundation Scotland and OSCR as a 'dormant' trust, which had not paid out for many years. Contact was made with the heads of the Trades that were still operating and who were, unbeknown to them, listed in the deeds as the appointed trustees of the William Stewart's Trust. With the support of Foundation Scotland, it was agreed that the Trust would wind-up, with a reorganisation scheme put in place to breathe life back into the remaining funds.

It was important to trustees that the unlocked funds of £11,000 kept with the original purposes of the Trust – benefitting local educational needs. They selected a small local charity, the Tay Rivers Trust, as the beneficiary of the remaining funds.

Tay Rivers Trust work in environmental research and education in the Perth and Angus area and the funds have been an incredible boost for the charity, enabling them to develop their successful 'Salmon in the Classroom' programme, which teaches children about the environment, the River Tay and the salmon hatchery which sits on its banks. The funds will allow the programme to potentially reach a further one hundred young people in the area each year and establish a small fundraising plan, meaning the transfer of £11,000 will in fact mean so much more to the organisation.



John Wood, former trustee of The William Stewart's Trust said:

"It was certainly a surprise to find out that I was a trustee of a Trust I had never heard of! Initially I was worried about what this would mean and what I would be obliged to do. However, Foundation Scotland led the way, and it was happily a very straight-forward process. It's frustrating to think that thousands of pounds have been sitting needlessly in a dusty bank account when the funds could have been helping others, but I am just delighted they are already working hard for the Tay Rivers Trust. It's great to know that hundreds of local young people will get the chance to learn, enjoy and take part in these great environmental activities thanks to the Revitalising Trusts project."

If you think your charity could benefit from support to spend its funds, please do get in touch: stephanie@foundationscotland.org.uk

[Read more about the project here](#)





EDUCATION & TRAINING

Community-Led Funding

All over Scotland, local groups and charities have brilliant ideas for how to make their communities happier, fairer, and more sustainable. We work with communities to bring these ideas to life, and work with our donors to invest in community action that enables people to make decisions about the places they live.

As part of this work, we administer over £6 million in community benefit payments every year, linked primarily to renewable energy projects. We work with more than three hundred communities across Scotland, supporting the set-up and on-going activities of over sixty community benefit funds.

Spotlight on.... Education and Training funds

Growing numbers of Scottish communities are setting up dedicated Education and Training grants programmes across Scotland, thanks to community benefit funds provided by the renewable energy sector and onshore wind farms.

Foundation Scotland has been able to support the distribution of more than nine hundred of these grants.

Earlier this year, the amount of Education and Training funds that we have distributed exceeded an impressive **£1 million**, since the first fund was established in 2015. These funds have been specifically set up to support individuals with costs that are a barrier to accessing college or university, or to cover expenses for training programmes and skills improvement that help them enhance their employment opportunities.

One such grant was awarded by the Burnhead Moss Education & Training Fund (BMET), which is provided by EDF Renewables, to 20-year-old Kyle Waddell, who lives in Limerigg, in Falkirk. Kyle wanted to be a full time HGV Driver but was having trouble raising the funds for the courses he needed to take. He applied to the BMET fund and received over £3,000 to pay for two driving courses. Kyle is now in demand as a fully qualified HGV Driver.

Kyle said, **“The support I’ve received from this fund and from Foundation Scotland has been brilliant – absolutely life changing. I’ve received two grants in total. The first award paid for the fees for my HGV Class 2 driving course, which at over £1500 I just couldn’t have covered myself. The course was fantastic, and I was able to get a full-time job driving lorries straight away. Then earlier this year I applied again, this time to cover the costs of the advanced course which I am due to start soon.**

“The funding has changed my life. I love my work so much but without the fund and Foundation Scotland’s support, it just wouldn’t have happened. I’d encourage other people to go for it, the process was really straightforward, and my career prospects are much better now I’ve done these courses. I’ve not looked back.”

Foundation Scotland will continue to support and promote these localised education and training opportunities, as the majority of those who have been awarded funds would otherwise not have been able to access support to further their career goals. This untapped talent lives in every community, and this type of fund is helping individuals and communities to flourish and grow.

You can find out what Education and Training funds are available by searching our website:

[**Available Funds | Foundation Scotland**](#)





Social Investment

At Foundation Scotland, we have a social investment team who can offer support and expertise to social enterprises, community organisations and charities who are looking for a new way to start or grow their business.

Like many businesses, social enterprises often need investment to start up and grow or develop and expand. Investment can help to buy equipment, purchase premises, or employ staff. But how does it work?

Private business can sell shares to investors, who may then receive profits from their investments. Social enterprises cannot. But they **can** receive investment as a repayable loan without having to give away profits or ownership.

This is where the social investment options offered by Foundation Scotland can open doors, recognising the commercial and charitable sides of enterprises and offering a different form of finance.

Why is Foundation Scotland different?

The social investment that Foundation Scotland provides is a unique form of blended grant and loan. We offer 25% grant with a 75% loan, and our interest rate on loans is not linked to the base rate but stays the same at 6%.

Over the last ten years, we have invested over £12 million to help social enterprises deliver pioneering and impactful business ideas that also look to address local issues and needs. But with Foundation Scotland, it's more than just money.

We care about the future of the projects we support. From grant funding and repayable finance to expert guidance from our investment team – for us, it is a partnership. Our support creates unique value for social enterprises in Scotland by giving their owners the freedom to develop their businesses and be ambitious.

We want to continue to grow our social investment portfolio so we can support even more grass roots organisations to deliver social impact locally and develop a thriving, sustainable business.

We have produced a short publication featuring three diverse and thriving social enterprises that Foundation Scotland has supported over the years, each with different models and business ideas, but each with ambition and vision.

Could this be you? Are you ready for investment?

Get in touch: socialinvestment@foundationscotland.org.uk



We work with more than four hundred donors across Scotland, who contribute to over 250 funds. From supporting children's health and wellbeing in Aberdeenshire to tackling food poverty in Dumfriesshire, our donors address a range of challenges faced within Scotland's communities.

Spotlight on... The Essentia Foundation

Foundation Scotland has been working with the Essentia Foundation since 2007, helping them plan and distribute funding all over Scotland.

The Essentia Foundation is an independent grant-giving charity in Scotland with the overarching vision of a fair and compassionate society where everyone is valued and can be successful.

Since their formation in 2005, they have been committed to promoting the health and social welfare of children and young people across Scotland and the promotion of urban or rural regeneration in areas of social and economic deprivation.

Working in partnership with Essentia Foundation trustees, Foundation Scotland facilitates their grant making activities. Essentia trustees are active in

the decision-making process and work closely with Foundation Scotland to ensure that grant funding can be as far reaching as possible.

Following a period of dormancy in 2017, the Essentia Foundation was revitalised in 2020, with a new set of trustees, and new funding opportunities for young people. Once again, trustees worked closely with Foundation Scotland to help set up and distribute their reactivated grants programme.

Then, in 2022, as well as running a multiyear awards programme to provide larger, more sustainable funding to organisations across Scotland, they also ran their smaller grants programme, which saw applications from all corners of Scotland. The applications focused on various themes, from sport, fitness and the arts, to sustainability and mental health.

From this round of grant funding, in February of this year, the Essentia Foundation hit a significant milestone, **awarding its 100th grant in Scotland.**

The next round of funding will take place in **May 2023**. We look forward to continuing our support for Essentia, and tracking the progress of all projects as they begin their journey.

You can read some case studies here: [**Our Success Stories - Case Studies - Essentia Foundation**](#)



Our Donors

Foundation Scotland provides wrap-around services and support for corporate giving and for individual donors. Our experience in effective community engagement makes it easier for businesses and individuals to forge meaningful relationships with communities and causes. We help donors find the right fit between them and the causes they value, or the places where they want to make a difference.

We also provide support with **setting up legacy funding**, so that individuals can make a difference to the future of Scotland's communities for generations to come.

How we can help

Leaving a legacy in your will to Foundation Scotland is an effective, flexible and tax-efficient way to support the causes and communities you care most about.

You can choose to leave a legacy to Foundation Scotland to help us respond to meet the ever-changing needs across Scotland's communities or you may prefer to leave specific instructions, identify purposes that are close to your heart, or assist people living in a specific area that is meaningful to you. Whatever your wishes, we will work with you to reflect the difference that you want to make.

Following the death of his wife, Iain Cochrane contacted Foundation Scotland to re-evaluate his plans:

“After my wife died, I rewrote my Will with a reappraisal of my charitable bequests. I had already heard about Community Charitable Foundations - with approximately forty such organisations in England and only one in Scotland, there was no contest.

“With the support of Foundation Scotland, we created a fund, referenced in my Letter of Wishes, which will accept a large portion of my Estate after my death, to be invested and thus generate an income in perpetuity. I was able to specify regions in Scotland that I wish to benefit - specifically I chose Angus and Fife, where my wife and I grew up, and the Inner and Outer Hebrides where we enjoyed so many wonderful holidays.

“Foundation Scotland were patient and helpful, advising me and devising a scheme which suits my wishes and of which my wife would have approved. It is partly in her memory that I do this, but also to benefit the more rural and far-flung regions of the country.”

[Read more about our support for setting up legacy funds here](#)

If you would like to find out more about leaving a legacy with Foundation Scotland, you can contact Vicki at **development@foundationscotland.org.uk**



JANUARY - MARCH 2023



VALUE OF NEW DONATIONS:

£6,458,493



TOTAL NUMBER OF GRANTS PAID:

889



TOTAL VALUE OF GRANTS PAID:

£5,687,008



TOTAL VALUE OF LOANS PAID:

£75,000



TOTAL NUMBER OF NEW FUNDS:


4


Contact us

▲ Tel: 0131 524 0300

▲ Email: enquiries@foundationscotland.org.uk

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Foundation Scotland

Scotland's Community Foundation