



# LARGE GRANTS

*for the themes of Financial Security, Education Pathways, and Work Pathways*

## GUIDANCE

If you have any communication support needs that make reading this guidance difficult or impossible, please get in touch with us by emailing [funding@therobertsontrust.org.uk](mailto:funding@therobertsontrust.org.uk) or calling 0141 353 4321 to discuss alternative ways to find out about this fund.



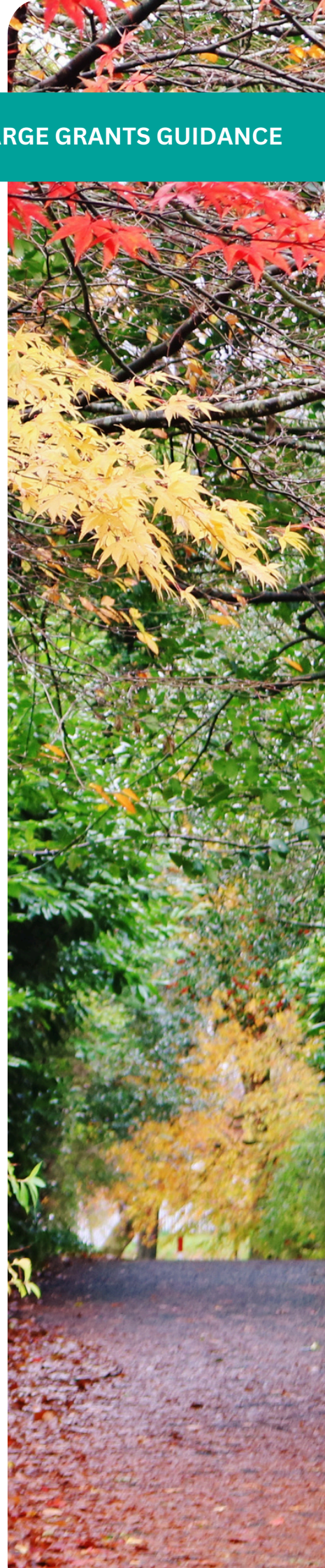


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## Who and what are Large Grants for?

- For **registered charities** working in Scotland, with an annual income\* of over £200,000 and up to £2 million, that support people who are experiencing (or are at higher risk of experiencing) poverty and trauma
- **Unrestricted or restricted revenue funding\*** of between £20,000 and £50,000 per year, typically for three years, but may be considered in exceptional circumstances for up to five years.
- Apply at any time.

\* See definitions on next page







## Definitions

**Annual Income:** This is based on the money your organisation received in the last financial year, as shown in your most recent annual accounts. If you are a new organisation, which has not yet produced accounts, you can base this on the income you expect to bring in in the year ahead. As a general rule, we will only accept applications for Large Grants from charities whose annual income is over £200,000 and up to £2 million. There are some cases where we will make exceptions, for example, if your income last year was less than £200,000 but you are growing your activities and projecting increased costs; or if your income was over £2 million due to one-off funding for a capital project. We understand that organisations' income may fluctuate from year to year and we'll therefore look at up to your last three years' income, as presented on OSCR. If you would like to be considered for a Large Grant but you're still not sure if it's right for your charity, please call us on 0141 353 4321 to discuss.

**Revenue funding:** is used to cover the costs of providing day-to-day services. We can provide revenue funding in two ways:

**Unrestricted funding:** can be spent on the annual running costs of your organisation, such as salaries, heating, lighting, administration, consumables and small items of equipment, such as laptops. We particularly welcome applications for unrestricted funding where the work of your organisation is purposely designed to address a priority described within one or more of our themes.

**Restricted funding:** can only be used for a specific project, activity or designated purpose, as applied or identified and agreed by us as being aligned to a priority described within one or more of our themes.



### Who can't apply?

- **Charities who are already in receipt of a Small or Large Grant from us**, or revenue funding from our previous Open Grants programme (which closed in early 2020). If you wish to apply for further funding, the earliest you can do so is 6 months before the end of your current grant period. If successful, we would not release any funds before your existing grant ends and you've sent us your End of Grant Report.

The following types of organisation are not currently eligible for funding from us. However, we are committed to reviewing our guidance and criteria across the course of our strategy. To be kept informed, please [sign up to our mailing list](#).

- **Housing Associations and Arm's Length External Organisations (ALEOs)** - these are organisations which are formally separate from the local authority but still subject to its control or influence).
- **Community Interest Companies (CICs)**. While Large Grants are not currently available to CICs, larger asset-locked CICs have been able to apply for [Programme Awards](#) via thematic open calls and, previously, [Partners in Change](#). As our Social Impact Investing work opens, we envisage being able to offer affordable loans to some asset-locked CICs whose work is strongly aligned to our mission, via investment partners. We will also undertake a new review of how CICs working to prevent and reduce poverty and trauma could be eligible for grant funding, concluding by March 2025.







## What do I need to apply?

- **A minimum of three unconnected Trustees on your charity's Board.** By unconnected we mean not related to each other; married or in a civil partnership with each other; in a relationship with each other or living together at the same address.
- **Recent independently examined or audited annual accounts.** If your organisation is a newly registered charity which has not yet produced accounts, we'll ask you to send us details of an independent referee, a recent bank statement and a financial projection showing your organisation's expected income for its first year. We may also ask you to send us a copy of your most recent management accounts so that we can better understand your current financial position..
- **A policy on Equality, Diversity and Inclusion.** We want to know that your organisation has a written agreement detailing how you will avoid discriminating against people, and how you will create a safe and inclusive atmosphere both within your workplace and for the people you support.
- **A safeguarding policy.** If your organisation directly supports children and young people or vulnerable adults, we would expect you to have an appropriate policy document which sets out how you will keep them safe. Further information and resources can be found on the OSCR website [here](#).



**Through our Large Grants, as with all our funding, we want to support work that seeks to prevent or reduce poverty and trauma for people and places in Scotland.**

We know that often where people experience poverty, they may also experience related types of trauma. We are concerned specifically with the trauma that impacts within families and where a significant contributing factor is the experience of poverty, especially deep and enduring poverty.

Risks include neglect and abuse in childhood, and domestic abuse in adulthood. Not everyone in poverty will experience trauma but poverty can both increase the risks of experiencing trauma and weaken the protective factors that can help people avoid the impacts of trauma. The experience of trauma can keep people locked into poverty and long-term patterns of trauma (where this is passed down between the generations).

We want our funding to help prevent and reduce poverty and trauma, tackling the material aspects of poverty now and the effect on longer-term prospects that are often related.







We are interested funding work which is aligned to one or more of the following themes, and which is clearly and intentionally designed to address one of the priorities described within them (please click the links for details):

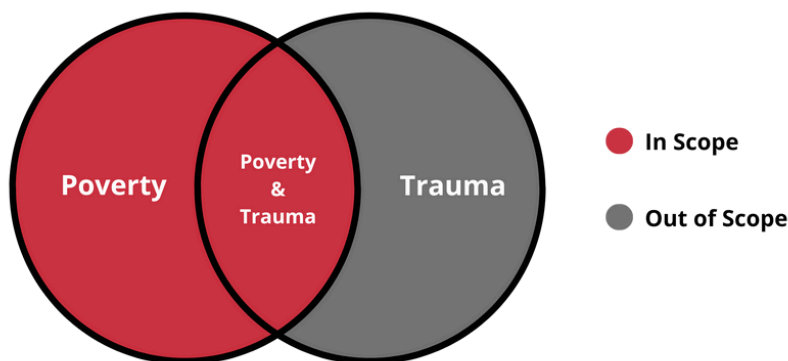
- **Financial Security** – improving income adequacy, income security, manageable costs, financial safety nets and advice for those most at risk of poverty and trauma.
- **Education Pathways** – preventing and reducing poverty and trauma through access and engagement in early years, education, training and learning.
- **Work Pathways** – improving access to good and fair work that can prevent and reduce poverty through increased pay, hours and career progression. This also includes employability support, focused on areas or groups with lower employment rates.
- **Nurturing Relationships\*** - breaking the cycle between persistent poverty and intergenerational trauma, addressing the impacts of trauma within families, and for individuals facing severe and multiple disadvantage, where a significant aggravating factor is the experience of poverty.

\*We are initially taking Large Grant Applications under the Nurturing Relationships theme through an open call, open from 27th November 2024 and closing at **12 noon on 24th January 2025**. You can view our guidance and [apply here](#).



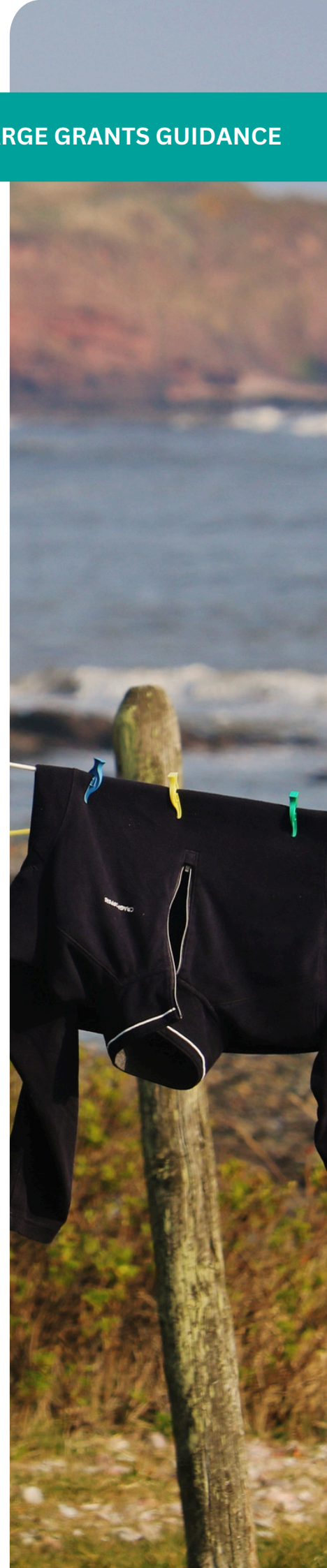
As we know that not everyone who experiences poverty will also experience trauma, we will fund work which either:

- is focused solely on preventing or reducing poverty, or;
- which seeks to prevent or reduce poverty and trauma together, where the experiences are interlinked.



Here are some examples of the type of differences we look for across our themes. Please note these are not exhaustive and we welcome other examples that also address our priorities:

- **Financial Security** – we want to ensure that people who are struggling with day-to-day costs have access to essential services and advice. This may include access to affordable items, such as food and clothing, also access to advice and information around welfare benefits, income maximisation and better financial security.







- **Education Pathways** - we are particularly interested in work that focuses on support for educational engagement and attainment, including mentoring schemes for young people. We are interested in approaches with young people which are relational and collaborative, and which involve both schools and parents, factors which we recognise as vital for building resilience and confidence within education.
- **Work Pathways** - we want to help ensure that work can be a better route out of poverty by supporting key population groups who are underrepresented in the labour market. We are interested in projects which ensure that each individual is given the time and support to overcome any barriers to employment, with tailored one-to-one training and practical support, to gain and retain employment. We are also interested in projects which actively engage with employers to improve access to good and fair work.

We are particularly interested in work which provides earlier help in order to prevent or reduce the likelihood of experiencing negative outcomes relating to poverty and trauma.

We can also fund work which:

- meets people's immediate needs around poverty and trauma
- tests new approaches or does more of what works
- is universal (aimed at a wide group of people or an entire community) or targeted (focusing on a specific beneficiary group, e.g. young people),, as long as it shows how it will reach and meet the needs of people (at higher risk of) experiencing poverty and trauma.




**Groups of people affected by poverty and trauma:** We would like to fund work focusing on groups of people who experience higher rates of poverty and trauma, or who are at higher risk, than the population as a whole. We are focused on those groups in Scotland who are more likely to experience low incomes and restricted opportunities as a result. These groups include but are not limited to:

- Lone parent families
- Child poverty priority family groups (including larger families, families with young children, and young parent families)
- People experiencing severe or multiple disadvantage (e.g. due to homelessness, substance misuse and offending)
- Disabled people
- Communities experiencing racial inequity
- Asylum seekers, refugees and those with no recourse to public funds
- Households claiming Universal Credit or related low-income social security benefits
- People with experience of the care system
- Unpaid Carers
- Women
- Young people (in most cases up to 25, or 30 for those with additional support needs)
- Older people
- People living in deprived places, including rural or remote communities







We will also consider work which is not specifically aimed at these groups but which provides earlier help to prevent or reduce the likelihood of experiencing negative outcomes relating to poverty and trauma.

Where targeting people on low incomes is difficult, such as in rural or remote areas, we would ask that you share evidence of the impact, or planned impact, of your work on preventing and reducing poverty and trauma.

### What can I apply for?

- **Revenue funding typically for three years,** depending on your need or request. For exceptionally strong applications, we can consider up to 5 years' funding for work which is most clearly and directly aligned to one of our funding themes and at least one of the priorities listed under that theme, and which is also recognised as leading or best practice. Please see our [FAQs](#) for applicants for further information.
- **Revenue funding of between £20,000 and £50,000 per year.** Please note that we are planning to move towards making fewer, but higher levels of grant. While grants of £50,000 per year will be available, these will be for work which is most clearly and directly aligned to one of our funding themes and at least one of the priorities listed under that theme, and which is also recognised as leading or best practice. For this higher level of funding, we are particularly interested in work which is preventative, either focused solely on preventing poverty, or on preventing poverty and trauma where the experiences are interlinked. In addition, we are interested in work which has clear potential to contribute to long-term change in addressing poverty and trauma at practice, organisational, community, or system level.

- We can consider **unrestricted funding**, which can be used to support any costs within your organisation, to help you further your work. Where there are elements of your organisation's work that do not fit with our themes, you may not be eligible for unrestricted funding.
- Alternatively, we can consider **restricted funding** for a specific salary, project or service, including any associated equipment costs, such as laptops. We can consider fully funding a small project or part-time salary, or part-funding a larger project, service or full-time salary.
- You don't need to have any match funding in place when you apply, but if we are not able to fund the total costs of your work, you will need to consider additional sources of funding. Our Funding Officer will discuss this with you during the assessment process.
- Due to the high level of demand for our funding, you can only hold one Large Grant under Our Funds at any one time and you would not be eligible to apply for a Small Grant. The exception to this is with our Programmes Funding. It is possible to hold a Programmes award, and a Large Grant at the same time. However, if you are already in receipt of funding from us, we will take this into consideration when assessing any new request you make.

### What will not be considered for funding?

We're happy to fund most costs, but there are certain costs and activities we would not consider supporting:

- Work which takes place outside Scotland
- Work which seeks to address forms of trauma which are not connected to experiences of poverty, but are experienced across the general population - for







example, trauma caused by a car accident, bereavement or illness.

- Funding for individuals (by this we mean we won't provide funding which primarily benefits only one or a very small group of individuals, although we could consider funding to provide e.g. vouchers to individuals to help with the costs of essentials)
- Whilst we can provide funding to faith-based organisations delivering services and activities for the wider community, we cannot contribute towards projects and activities which incorporate the promotion of political or religious beliefs, or requests for salaried posts and volunteer costs where there is a requirement to be of a particular faith or none. This is because of the Trust's commitment to support and enable equal access to activities, employment and volunteering opportunities, regardless of whether an individual is of a particular faith or none
- Feasibility studies or academic research
- Replacement of statutory revenue funding for mainstream playgroups and nurseries
- Standalone costs of childcare provision, although we may consider making a contribution towards childcare costs as part of a broader programme of support to help individuals access education or work, where childcare presents a barrier to this.
- Daycare or residential care for older people
- Standalone events or festivals – i.e. events that are not part of a larger programme of work relating to poverty and trauma
- Any retrospective costs already incurred by the applicant organisation
- Any costs not incurred by (or the salaries of staff not directly employed by) the applicant organisation.
- The salary costs of staff who are also Trustees/Directors on the applicant organisation's Board.
- Capital costs such as building or renovation works, although, as above, we may consider small items of equipment as part of your revenue request.

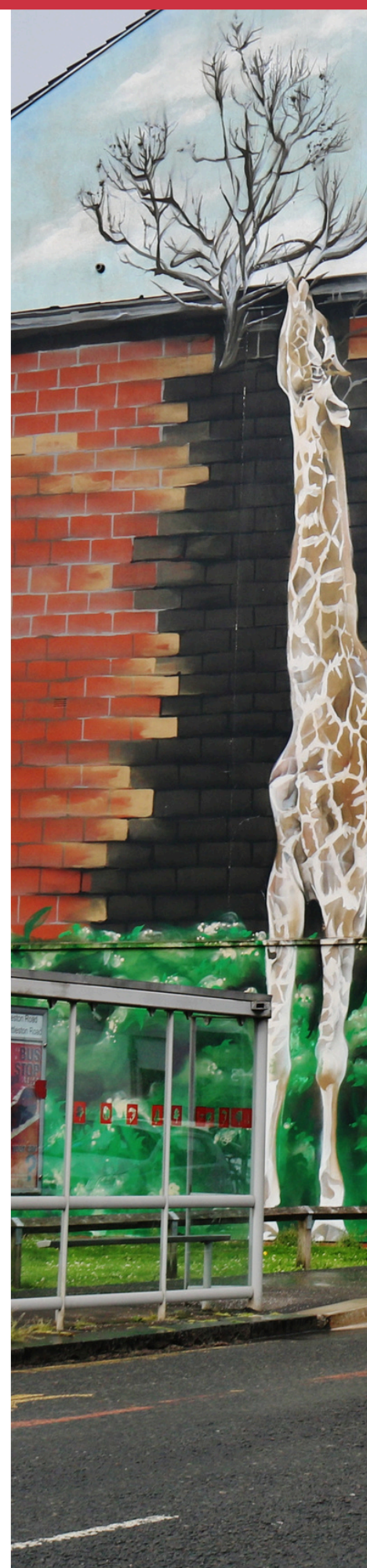
If any of the above costs make up a large part of your organisation's annual expenditure, we will be more likely to restrict any grant we award you.

## What do you look for in an application?

We consider a number of key criteria when assessing applications. As well as meeting the basic requirements and fit with our themes and associated priorities, as outlined above in the 'What type of work will you fund' section, we want all organisations who apply for a Large Grant to demonstrate how their work aims to prevent or reduce poverty and trauma. This is the most important consideration to us as a funder and will influence the level of funding that we are able to offer.

- **Focus on preventing or reducing poverty and associated trauma:** Organisations should show us that they recognise the challenges people in their community are facing in their lives related to poverty and trauma, as well as how their organisation's work will respond to this and support them, and work to prevent future experiences of poverty and trauma.

Organisations applying for higher levels of funding, for example over £40,000 a year, should show how their work is specifically targeted at people who are facing poverty and trauma. They will have a commitment and track record in applying good practice approaches and may be recognised as a leader in their field. They can clearly demonstrate how their work will make a difference through a preventative approach, and may potentially bring about change at practice, organisational or system level. Their work may test new approaches, or may build on what already works.







**We also would like all organisations who apply for a Large Grant to demonstrate how they:**

- **Focus on community participation:** by showing that they involve their community in the organisation, for example on the Board or through volunteering; and that they listen to their community and respond to their needs. By community, we mean either a geographic community or a community of interest (a group of people with shared characteristics and/or experiences). We are also interested to know how applicants include people from diverse communities (for example disabled people or people experiencing racial inequity) and remove barriers to their participation.

Organisations applying for higher levels of funding should show how they have listened to people with lived experience of the issues they act on, and can show how they have considered their views in the design and delivery of their services.

- **Focus on relationships and rights:** by showing that their work has a clear relational focus (i.e. that they treat people as individuals with equity, dignity and respect) and that this is reflected in their policies and governance.

Organisations applying for higher levels of funding will be able to demonstrate an assets-based approach to support an individual's independence, resilience, and an ability to make their own choices. Detailed plans will be in place to ensure that the board, staff and volunteers are poverty and trauma aware, are effectively supervised and supported, and have relevant skills, knowledge and training appropriate to the target group of people accessing their services.

- **Focus on collaboration:** by showing that they are aware of other groups and services in their area, including those delivering related work, and are linked in with them, for example, through referrals, partnership working or participating in local networks.

Organisations applying for higher levels of funding should be able to demonstrate their willingness and track record of working collaboratively and have clear plans to share learning from their work. They will be able to demonstrate a clear understanding of key local, regional and national strategies and provide examples of practice and influencing which reflect this.

If you plan to deliver your work in a formal partnership or consortium with other charities and would like to discuss how this might be supported by the Trust, please contact us at [funding@therobertsontrust.org.uk](mailto:funding@therobertsontrust.org.uk).

**Other criteria we consider include:**

- Size of grant the applicant organisation is asking for, relative to its annual income – we try to be proportionate in how much we award.
- Organisation's financial position, including its sustainability and whether it has an immediate need for our funds.
- How the organisation is governed.
- The duration and the scale of your work, for example delivered at local, regional or national levels, and the number of people it will support.



**We consider Large Grant applications under the themes of Financial Security, Education Pathways and Work Pathways as part of a rolling programme of funding.**

**You can apply at any time, bearing in mind our timescale for decisions, detailed below. You can download a copy of our application questions and help text [here](#).**

Please complete [the online application form](#). Within the form, we will ask you to upload:

- A copy of your most recent independently examined or audited annual accounts.
- If you are a newly registered charity and have not yet produced accounts, we will ask you to provide details of an independent referee (someone who knows your work well but is not directly involved in it), a recent bank statement and a financial projection showing your organisation's expected income for its first year.
- A budget detailing the costs of your work, including any other funding secured or projected towards these. We ask that you use our budget template (linked within the application form) to provide this information.
- If you are applying for a contribution towards salary costs, please provide a job description for the post, including contracted hours per week and salary scale.

## What happens next?

- **We'll email you to confirm we've got your application** and when you can expect to receive a decision.
- **We'll aim to tell you the outcome of your application within 10-12 weeks.** This is dependent on receiving any additional information we may ask for – delays in receiving this extra information could mean the decision takes longer. As we have been receiving increased numbers of applications across Our Funds, there may be times where we have to extend our published turnaround times. We will do our best to respond to requests and assess new applications within our published deadlines, but if there are any changes to this we'll either communicate this in advance and/or notify applicants on an individual basis.
- **We'll send all correspondence about your application via email,** so it's important that the email addresses and contact details you provide in your application are correct. We'll normally contact the person you've listed as the 'application contact' in the first instance, so it's helpful if this person is available during the assessment period. Please let us know if there are any changes to the contact details provided.
- **We'll assign one of our Funding Officers to assess your application.** They may get in touch with you during the assessment period and will be able to help you with any changes or updates you might need to make to your application.



## If we award you funding:

- **We'll email you to let you know.** Before we can pay your funds, we'll ask you to provide a copy of a recent bank statement for your organisation's account (within the last three months).
- **We may also ask you to complete certain actions before we can pay your funds.** This is more likely to be the case for restricted awards rather than unrestricted. For example, we might ask you to provide evidence of other funding or let us know when a new postholder has been appointed.
- Once we have the information we've asked for, we'll do our best to pay the funds to your organisation's bank account **within two weeks**.
- We'll ask that you send us a **brief report at the end of each grant year** telling us about your progress, the differences or outcomes your work has contributed to making for the people and communities you support, and what has helped to make those differences. We may use information from your report to highlight stories and case studies used as part of our Communications work. We may also request to visit you or speak to you on the phone to find out how you're getting on and whether you need any additional support from us.
- As you approach the end of your grant, we know you may be thinking about further funding. **You can reapply to us from 6 months before the end of your grant period.** If successful, we would not release any funds before your existing grant ends and you've sent us your End of Grant Report.

Take a look at the [Support for grant holders](#) section.

## If we do not award you funding:

- **We'll send you an email in which we'll try our best to explain why we've not awarded you funding.** We will also let you know in our email how soon you can re-apply. If the reason we haven't awarded you funding is something we both think you can address, you may be able to re-apply once you have been able to do so. We'll explain this in the email.
- If you would like to have a chat with us about our decision and whether – or how soon – you can re-apply, you can email us on [funding@therobertsontrust.org.uk](mailto:funding@therobertsontrust.org.uk) and your Funding Officer will aim to get back to you within five working days.

## FEEL FREE TO GET IN TOUCH

If you have any other questions about applying for a Large Grant, please contact us on 0141 353 4321 or [funding@therobertsontrust.org.uk](mailto:funding@therobertsontrust.org.uk)

We've done our best to make sure the above guidance is clear, however, if you have any feedback on this, we'd welcome the chance to talk to you about it.