

The Robertson Trust's grant holder survey—

Social change

Analysis of findings

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Contents page

Executive summary	3
Introduction	5
The social change grant holders achieve	7
Participation	13
Prevention.....	17
Racial Justice.....	22
Climate Change	26
Future support needs.....	31
Conclusion	36

To assist navigation:

Introductory material will be indicated with a **purple** flag (Executive summary and Introduction)

The section on the social change grant holders achieve will be indicated with an **orange** flag.

The sections on the Robertson Trust’s strategic priority areas of Participation, Prevention, Racial Justice and Climate Change will be indicated with a **pink** flag.

Future support needs and the Conclusion will be indicated with a **yellow** flag.

Executive summary

In June 2023, The Robertson Trust (the Trust) hosted a survey for its existing grant holders, to help understand the Trust's effectiveness as a funder, and to identify areas to improve upon. A total of 468 grant holders responded to the survey which is a response rate of 63%.

Grant holders achieving social change

Responding to an open-ended question about the social changes the organisation wants to make for individuals, communities and/or systems, responses fell into several (overlapping) categories:

- Cohesive and connected communities, reduced isolation and safe/welcoming spaces
- Individuals able to lead financially stable, sustainable and independent lives, able to navigate barriers to support and services and take advantage of opportunities
- Individuals leading healthier lives, supported emotionally and holistically, able to express themselves creatively, families and children supported to overcome the challenges of multiple deprivation
- Individuals and families able to access basic necessities in times of poverty and cost of living challenges

Learning about strategic priorities

Of the Trust's strategic priorities, Participation was particularly strong—a main focus for 4 in 10 organisations. Overall, more than 9 in 10 organisations did some participation work.

Prevention was the next strongest priority—a main focus for a quarter of organisations, and overall, around 8 in 10 did some prevention work.

The priorities of Racial Justice and Climate Change were less strong in the portfolio – racial justice was a main focus for 1 in 10 grant holders; and climate change for 1 in 20. However, combining the figures for 'main focus' and 'some focus', around 50% of the portfolio was working on each of the priorities: climate change and racial justice.

The challenges organisations described in focusing on these strategic priorities were varied, but resource challenges came up in each theme. Other cross cutting issues included the practical circumstances (including mental health) of the people the grant holders support, and mindsets, stigma or lack of knowledge in society.

Future support needs

Respondents were forthcoming in sharing how the Trust could help them in deepening their work in relation to Participation, Prevention, Racial Justice and Climate Change. They referenced a range of factors relating to the way the trust funds; its potential voice on these topics to national audiences; and the knowledge and learning opportunities it could provide—with peer networking a major theme.

Introduction

Background

In June 2023, The Robertson Trust hosted a survey for its existing grant holders, to help understand the Trust's effectiveness as a funder, particularly around its strategic priorities. A total of 468 grant holders responded to the survey which is a response rate of 63%.

The Robertson Trust commissioned NPC to analyse and summarise the findings. We conducted both quantitative and qualitative analysis of the survey responses, including summarising responses from the scoring statement and multiple-choice questions and identifying areas for cross-analysis by breaking the data down by organisation size, geographic focus and grant type. We then supplemented our quantitative findings with qualitative analysis of responses to open-ended questions, allowing us to thematically analyse the results and gather findings.

About this report

This report explores the context Trust grant holders are working in, and their experiences of working to address the Trust's strategic priorities. The findings will be useful to the Trust and its grant holders and may be of interest to other funders. This report covers:

- Grant holder reflections on their work achieving social change in their own words
- Grant holder reflections on their work in Participation
- Grant holder reflections on their work in Prevention
- Grant holder reflections on their work in Racial Justice
- Grant holder reflections on their work in Climate Change
 - Note, these four areas are strategic priorities for the Trust which underpin all the work that it does as an organisation.
- Future support needs

A companion report, *The Robertson Trust's grant holder survey—Customer service; Analysis of findings*, draws on data collected in the same survey, but focused on information shared by grant holders about their experience of working with the Trust. Please see that report for background information on survey respondents, including organisation size, geographic focus, grant type, type of award, and award length.

The social change grant holders achieve

The survey asked grant holders an open-ended question about the social changes the organisation wants to make for individuals, communities and/or systems. Overall, the responses fell into several (overlapping) categories,¹ which can broadly be broken down as follows:

- Individuals able to lead financially stable, sustainable and independent lives, able to navigate barriers to support and services and take advantage of opportunities (indicated a primary focus for ~33% of respondents).
- Individuals leading healthier lives, supported emotionally and holistically, able to express themselves creatively, families and children supported to overcome the challenges of multiple deprivation (indicated a primary focus for ~21% of respondents).
- Cohesive and connected communities, reduced isolation and safe/welcoming spaces (indicated a primary focus for ~15% of respondents).
- Individuals and families able to access basic necessities in times of poverty and cost of living challenges (indicated a primary focus for ~5% of respondents)

Empowerment, independence and stability

Grant holders also aim to create a positive impact by empowering people to improve their own lives and to gain access the services they need. 153 out of 468 organisations (33%) indicated this

¹ In many cases, grant holders' answers spanned a number of overlapping outcome areas. These cases have been assigned to the outcome area that seemed most prominent (rather than double counted under two outcome areas). In other cases, grant holders' responses described their activities or how they intend to use current or future grant funding. While some of these activities correlated clearly with one of the outcome themes, this was not always the case. The percentages given should be taken as approximate (rather than absolute) proportions. 54 out of the 468 organisations did not answer this question or answered it purely with a description of their activities.

is a primary focus for them. This might be through raising awareness, or reducing barriers, or encouraging them to take advantage of opportunities:

To ensure that individuals do not suffer through ignorance of their rights, responsibilities, or of the services available to them, or through an inability to express their needs effectively.

[Grant holder organisation aims to] empower them to take more control over their lives, both the barriers that they face and the opportunities that they want to choose.

Empowering individuals and improving their resilience. Increasing knowledge and awareness of self-help techniques.

We want individuals, whatever their background and identity, to have opportunities to flourish and achieve their potential. We want them to have control over their lives.

We want people to feel part of something which allows them to communicate their needs and ask for and receive the help they need whether it be health and well-being, financial or social.

Many grant holders noted that their aim in empowering people in this way is to enable them to live financially stable lives, as independently as possible.

Our organisation wants to see young people, who maybe haven't "achieved" academically or socially, use work/employment as a means of boosting their esteem, self-belief and financial independence.

Grant holders want to ensure that the voices of young people and other people at risk of exclusion (those on lower incomes, those with health conditions, those in the asylum system) are heard on matters that affect them:

We want to be able to give young people a voice, however we want to approach this in a way that does not result in them having to be involved in paperwork or sitting in on board meetings. Young people have told us that their lives are stressful enough and they need ways to reduce pressures, not increase them. We feel that there needs to be a review on what "Youth Led" really means and look at better solutions to empower young people to thrive. We want young people to be ambitious and to see the vast amount of opportunities that could be available to them. We have found that living in a rural area, young people can have a very limited view of the world.

We want to continue to develop and deliver holistic support for people seeking asylum and refugees. In the context of a hostile environment where the government is trying to dismantle the asylum system anti destitution support is essential and in even greater demand. We want to see

people thrive as new Scots and access their rights and entitlements are well as grow confidence, community and find places to develop new skills, make friends and have fun.

Ultimately, grant holders feel that enabling people to become empowered and independent will return benefits back into their communities.

We aim to give young people a better start to adulthood by helping them to become more confident about themselves and their abilities, and their relations with teammates. This will enable young people to be more effective citizens.

Bringing communities of young folk together to energise and embolden their collective power will further play a crucial role in addressing challenges faced by marginalised groups; reducing inequalities and improving pathways.

Better physical and emotional health

Other grant holders aim to create social change by supporting people to live healthier lives in the round, including physical, mental and emotional health. 100 out of 468 organisations (21%) indicated this is a primary focus for them. There is significant overlap between these comments and those above which focused on reducing isolation.

As an organisation we want to ensure that women, children and young people are supported to feel safe, embed into the local community and have their mental well-being needs met.

More specifically, some grant holders have a specific focus on helping those who have experienced trauma or abuse to heal from the effects of these experiences.

The changes we are supporting enable women to live happy, independent lives free from fear and gives them the tools to identify the flags of an abusive relationship in the future.

Our work is about healing people's traumas from the past which affects their well-being, opportunities and ability to function in their community. For us it is about allowing people to heal and move forward, to achieve educational opportunities and good satisfying jobs or education experiences, to form and build good healthy relationships that allow them to thrive, that protect children from harm and allows people to be responsible citizens.

Other grant holders have a specific focus on helping those who have experienced bereavement to heal and again, to connect to others in the community:

We wish to provide peer support from bereaved parents to other parents whose son or daughter, of any age, has also died, from any cause. We wish every bereaved parent to have access to the compassion, empathy, understanding, friendship, and hope that only other bereaved parents can give. We wish every bereaved parent to feel less isolated, to be able to have safe, non-judgemental space to talk about their child and their life without their child, to talk about their true feelings with those who truly understand them, to feel they can cope with the trauma and stigma they may be experiencing, and to have hope for a future life without their child. We wish all bereaved parents to feel they can again begin to play a role in the wider community.

Without appropriate support, bereaved and traumatised children can grow up to be troubled adults. The flip side of this is that by providing appropriate support we can empower bereaved children to achieve their full potential in life, becoming active citizens who go on to make a positive contribution in their local community.

Cohesion and connections

Grant holders noted a number of ways that they aim to create better cohesion, connections and reduced isolation of individuals within communities. 72 out of 468 organisations (15%) indicated this is a primary focus for them. In some cases, this is through the provision of free or low cost, safe spaces where people can connect and/or activities designed to bring people together.

Grant holder organisations aim to create better connections for groups including older people, children and young people, young families, people currently unemployed. These spaces also serve as hubs for vital community services such as food distribution and educational activities and to promote other social impact aims such as promotion of biodiversity and food growing.

[Grant holder organisation] offers young people and families a safe, warm environment when they use our facilities free of charge. As we continue to recover from the restrictions of covid we play a vital role in our community by bringing young people together to allow them to play and make friends in a safe environment. ...We want to see young people thrive in their own abilities and to develop whatever talent they may have, to improve their social skills by interacting with other young people, as well as building confidence and developing their skills.

We wish to bring members of our community closer together, providing a space for those who are lonely to meet and chat and strengthen bonds, regardless of age.

As a retiree club our aim is to provide a safe environment for those attending to enjoy social activities and to encourage participation and integration within the community while improving

health, mental well-being and combatting social isolation as many of those attending are elderly and live alone.

We want to offer a safe place where young people can be themselves without fear of judgment... We want to ensure that we promote our community in a better light, leading to young people becoming positive integrated members of society.

In other cases, the grant holder organisations aim to create more community cohesion by facilitating opportunities for community volunteering and giving back to the community:

We want to address social isolation and feelings of boredom, and lack of self-worth. We provide an environment that builds relationships, gives people a sense of purpose and they regain their self-esteem. They feel that they belong to the group and in turn help others in the community by providing services asked for by other community groups, Nurseries and Primary schools as well as local residents.

We want our individuals to feel confident coming to us for support & advice and to reach their full potential. We want our young people to be involved in the local community through events and volunteering opportunities.

We provide a serviced community hall for local people to use in many ways. Some use it for health benefits e.g., Yoga, Keep Fit, Dancing, Badminton etc. Others use it as a meeting facility where they can develop particular interests e.g., the Gardening Club. Toddlers Group helps early learning for youngsters. The Village Hall is intended as a community facility which can be used very flexibly to develop the community and improves people's lives. People can develop new interests, learn new skills and hopefully enhance their lives. The area is not a high wage area and thus proving a community facility which is reasonably priced and available to all is important to us.

Throughout these comments, grant holders emphasised the particular importance of these free/low-cost community spaces for connection in the current cost of living crisis.

[Grant holder organisation] wants to create a strong positive community. We want to create a 10-minute community in which groups clubs' activities and help can be accessed from just a 10 minute walk from individuals and families homes. We want to make a positive impact on social isolation and inclusion to ensure no individual or family feels alone or struggling. We want to keep our focus on creating clubs' activities and resources which are free to families and individuals to help with the cost of living crisis so individuals and families don't have to miss out on positive community engagement within the community and can be part of a strong community network.

Fulfilment of basic needs

The fourth major area of social impact that grant holders discussed in response to this question was about the fulfilment of basic needs, so that individuals can focus on building or rebuilding independent lives. 25 out of 468 organisations (5%) indicated this is a primary focus for them. Grant holders noted that this is particularly critical at this time during the cost of living crisis. Again, many of these comments overlapped with the other areas of social impact identified by grant holders, including community cohesion, individual empowerment, emotional support and reduction of isolation.

We want to give people a fresh start after a period of homelessness who have no recourse to funding to help them with their new tenancy. By providing them with all the small household items that help turn a house into a home helping them settle into their new home and community.

We want to give all local children the chance to access and fully engage in their education by removing barriers that are created by lack of appropriate clothing. By providing free school uniform in dignified and accessible ways we aim to support children's school attendance and attainment as well as their inclusion and well-being.

Through the project we deliver, we aim to empower people to take control of their financial situation, including supporting them to tackle high energy bills through our energy saving advice project. Overall, we want to help the community to be self-sufficient in local food, by promoting local growing, reduce carbon emissions, support resilience in mental health through our therapeutic projects and action for well-being project. Tackle energy security and financial security concerns especially on the back of covid recovery, cost of living crisis and energy crisis.

Participation

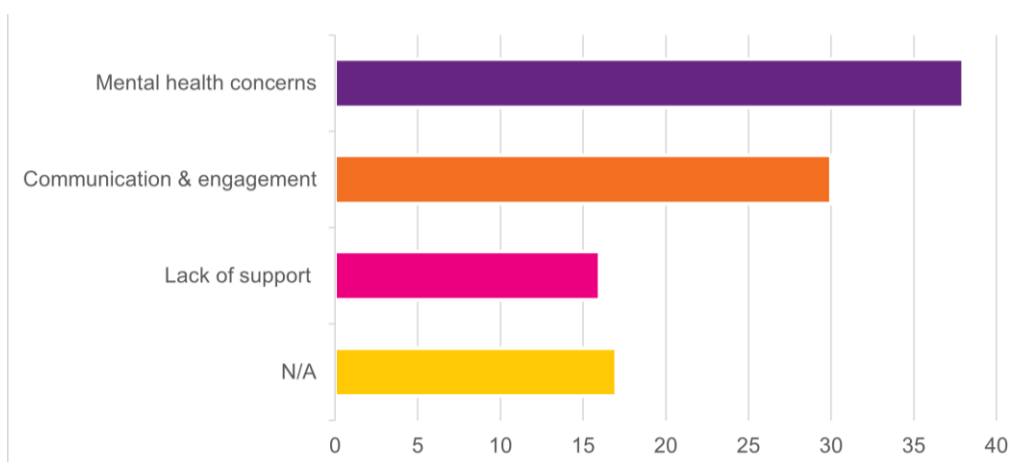
Of the Trust’s strategic priorities, participation was particularly strong—a main focus for 4 in 10 organisations. Overall, more than 9 in 10 organisations did some participation work.

Out of the 461 grant holders answering whether their organisation focuses on meaningfully involving individuals with lived experience across their work, 44% said it is the main focus of their work, and approximately 47% conveyed that some of the work they do focuses on participation. 6% believed that inducing participatory approaches in their work is important but lack the time or resources to undertake such strategies.

A follow-up question asked them their views on the key challenges that they have been facing when attempting to meaningfully involving people with lived experience in their work. A thematic analysis of the grant holder responses revealed 3 major themes:

- Mental health of participants;
- Communication and engagement;
- Lack of financial, practical, and governance-related support.

Figure 1: Percentage breakdown of challenges faced by grant holders when meaningfully involving individuals across their work



Mental health of participants

Responses from 38% of the 332 grant holders that shared what challenges they have faced while undertaking participatory work pointed towards such work involving an element of risk of triggering individuals with mental health issues, with many people being victims of stigmatisation in wider society. For instance, one grant holder conveyed that:

“The key challenge is understanding and managing the fact that they are invariably still very fragile themselves and therefore you need to make sure that you support them, don't push them too hard or fast and be acutely aware of when they need to slow down or back off and be given some "space" to re-centre themselves. They can't share their stories or help others if that sharing triggers / retriggers their own trauma”.

Several responses also highlighted privacy concerns, blurring of boundaries especially when service providers and participants interact, as well as both those who are helping better the situation and for those who the situation seeks to improve looking at each other with suspicion. Some grant holders conveyed that past experiences have led to low self-esteem and confidence amongst the participants:

“Participants can be affected by the experiences they have dealt with or endured and without the right support they can find it difficult to put boundaries in place”.

Additionally, one respondent explained how participants look at such work with:

“Reluctance and doubt as it has not worked for them before and that they are sceptical and cynical that it can. People also will give up, if they believe that no one is listening to them”.

On the other hand, prejudice can exist in another way, as noted by a grant holder: *“There can be a perception that people with lived experience of trauma, poverty or the care system are not capable of making objective and clear-sighted decisions about services”.*

Communication and engagement

The second theme that emerged from the analysis of survey responses revolves around difficulties in communication with individuals with lived experience, alongside ensuring meaningful and inclusive engagement in the work of grant holder organisations. Around 30% of grant holders felt that such issues form the basis of the biggest challenges they have faced in their participatory

work. Responses reflected points such as diverse expectations, language barriers, cultural and religious differences, and time pressures. For instance, one grant holder conveyed that:

“Our projects involve the whole community and, on occasion, those with lived experience of one issue expect the programme to always and exclusively reflect their needs. This isn't always possible, especially where experiences differ”.

Congruently, accommodating different individuals from different backgrounds in single combined sessions can prove to be a major issue. A respondent explained:

“It can be challenging to ensure diverse representation of people with lived experience, including individuals from different backgrounds, cultures, and socioeconomic statuses. Lack of representation can lead to a narrow perspective and may not adequately address the needs of all affected individuals. Also, a very practical challenge is that people with lived experience may not have a complete set of skills to be able to communicate what is important - this requires additional support, time and resources”.

Further, a respondent conveyed that:

“It takes time to build up trust and understanding so that the work is meaningful and goes beyond the 'headline'. This can be challenging when you are working with short funding cycles that require lots of 'deliverables' to be achieved”.

This point highlights a constant conflict between funder expectations and potential impact. Some organisations also faced issues with formal engagement, with a grant holder aptly articulating:

“Whilst informal involvement is relatively easy, it's not always possible to involve enough people more formally as we find that only a small proportion will respond to surveys, consultations etc”.

Lack of financial, practical, and governance-related support

For the third and final theme, approximately 16% of the respondents cited a lack of financial, practical, and governance related support and opportunities like money, knowledge, time, training of the staff, and funder perspectives to be the major issue when involving people with lived experience. For instance, one grant holder noted that:

“Investing time is often 1-1 work which can often be hard to justify/fund where stakeholders are often looking for 'numbers'.

In conjunction, another respondent explained that the current landscape and expectations of funders has proved to be a hurdle for them in achieving their desired outcomes, wherein they noted that they faced difficulties in creating a youth board because:

“Funders often expect a charity’s target audience to be fully immersed in structuring the programme. Our work is different because the young people come to us from very unstructured lives”.

A grant holder pointed towards the importance of knowing how to remunerate participants in the first place. Respondents also highlighted issues relating to training of staff members and volunteers, articulating that:

“Being accessible and inclusive of everyone is resource intensive (training, reflection, planning etc). Our training budget is tiny, and our time is always stretched”.

Similarly, a respondent explained how adequate upskilling is required when staff members interact with individuals with lived experience:

“Sometimes staff and volunteers can become over involved with a family, particularly if their issues resonate with them. Training and robust support and supervision is essential for all of our staff and volunteers to avoid any issues which may arise”.

The remaining 17% of the respondents either answered Not Applicable or did not directly answer the question.

Prevention

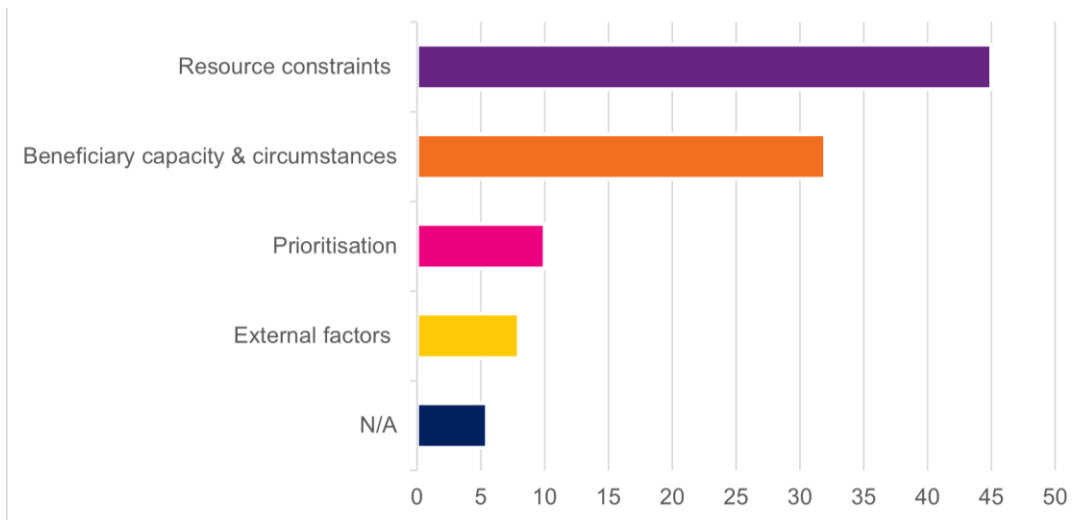
Prevention was the next strongest priority—a main focus for a quarter of organisations, and overall, around 8 in 10 did some prevention work.

Prevention refers to approaches that grant holder organisations often take to address poverty and trauma in order to make long-term and structural change in the environments they operate in.

Out of the 454 grant holders that answered the question revolving around the extent to which their organisation focuses on prevention through their work, 24% confirmed that it is the main focus of their work, with about 53% of the respondents noting that some of the work they do focuses on prevention. An additional 18% believed that preventative approaches are important but conveyed that they do not have the time or resources to undertake preventative strategies. The following section includes an analysis of the kinds of challenges grant holder organisations face while engaging in preventative work, and divides them into 4 major segments:

- Resource constraints;
- The capacity and circumstances of the people the grant holders work with;
- Prioritisation of long-term work;
- External factors.

Figure 2: Percentage breakdown of challenges faced by grant holders while undertaking preventative work



Resource Constraints

Approximately 45% of the 359 grant holders that answered the question relating to the challenges faced by them while undertaking preventative work cited resource constraints in the form of money, time, and staffing as the main hurdles stopping them from achieving their desired outcomes. For instance, one respondent conveyed that:

“Adequate funding and resources are essential for implementing effective preventative programs. The organisation has faced challenges in securing sufficient financial support, which limits our ability to reach all the children and families in need to provide comprehensive services”.

Another simply stated that it was time for themselves and from their partners which was proving to pose the most difficulties in their pursuit of preventative work. Further, a grant holder described:

“This year, we have seen a major reduction in staffing levels across our youth work and (especially) community work”.

Several other organisations agreed upon how the level of staffing to cover various times to suit different needs has been less than adequate to undertake such work.

Individual capacity

Another theme which was prevalent in the analysis for the question was related to the capacity and circumstances of the individuals whom the grant holders work with. Approximately 32% of the 359 respondents attributed challenges they faced in pursuing preventative approaches to the situations that their target groups find themselves in, alongside their mindsets which could be hard to change.

The responses included aspects like issues in ensuring the consistent attendance to sessions by families, time taken to establish trust and encourage vulnerable individuals to take a step forward and become resilient, propensity of people to lose their confidence and belief in themselves, and difficulties encountered by service providers to develop relationships with target their groups. For instance, one grant holder conveyed that:

“It is difficult for any person to make fundamental changes such as how they see themselves, how they behave and their decision-making process. For young people there is the additional challenge of peer pressure, family history, trauma as well as physiological changes in brain development making risk-taking/antisocial behaviour more appealing”.

Another organisation noted:

“We find it difficult to encourage people to help themselves. There would seem to be an apathy to moving forward and a desire to stick with the status quo. People often do not believe they have the ability and skills, or do not have the energy to gain the skills, necessary to help lift them out of poverty”.

Such responses point towards the importance of a combined approach wherein individuals and communities are meaningfully involved to ensure the betterment of their own conditions.

Prioritisation of long-term work

The third theme which was evident after a careful review of the survey results relates to difficulties in gaining access to longer-term funding and collecting data to measure the impact of preventative approaches, with 10% of the responses reflecting the presence of competing priorities that often focus on meeting immediate needs, the slow nature of results, and local bodies being better trained to tackle crisis situations to be hinderances in the grant holder organisations achieving structural change. For instance, one respondent conveyed that:

“Preventative work can be difficult to report and collect data on as this often involves invasive questions. This in turn makes it difficult to access funding for, particularly as preventative work forms part of our delivery but not the whole”.

Given that the organisations broadly focus on poverty alleviation, a respondent also noted that: *“The sheer scale of poverty facing us means that most of our time, money and efforts are taken up with supporting those in an emergency situation”.*

Another grant holder also highlighted that such work often seeks to answer extremely broad questions, like finding out whether it has prevented individuals from being homeless, making it hard to quantify. Others pointed towards a systematic level failure:

“A key challenge has been the focus on treatment rather than prevention as ultimately our systems are funded to treat people with problems rather than prevent”.

Further, a respondent articulated that challenges can be overcome with a change in mindset:

“Collective understanding that organisations can play a small part in prevention - but really it is about that individual person's own journey. This means it is not linear but quite messy and may mean people returning to use services rather than one off access”.

External factors

In conjunction with resource constraints, approximately 8% of the respondents acknowledged that challenges they faced while undertaking preventative approaches were either perpetuated or exacerbated by external and uncontrollable factors like the COVID-19 pandemic, cost of living crisis, adverse weather conditions, and government policies.

The responses reflected that the pandemic and cost-of-living crisis in particular have led to severe recruitment challenges and financial hardships for their own organisations, while also acknowledging the devastating impact they have had on their target groups. For instance, one respondent noted:

“The COVID-19 pandemic and the cost-of-living crisis have significantly influenced our work. The pandemic has led to job losses, financial instability, and limited access to essential services, exacerbating the challenges faced by individuals and families. As a result, our cases have become more complex, and clients often reach out to us when they are already in the midst of a crisis, rather than seeking assistance proactively”.

Several grant holders also conveyed that the adverse weather conditions often forced them to cancel their sessions. The current socio-political environment and government policies were also cited, with one grant holder that works in the realm of immigration detention believing:

“The challenge for us is the increasingly hostile political rhetoric around immigration, which makes the prospect of achieving positive change around immigration detention difficult”.

One respondent also expressed their frustrations about policies not being followed through in actions, with many political statements being made but little changes translated in/to reality in the past 25 years.

The remaining 5.5% of the respondents either answered Not Applicable or did not directly answer the question.

Racial Justice

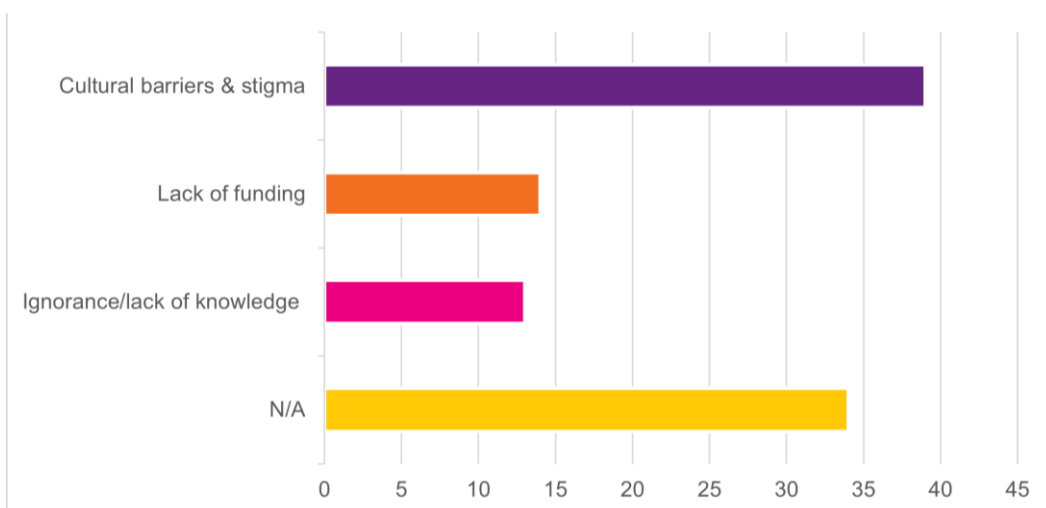
In comparison to the above priorities, racial justice has not been a priority for most organisations- it was the main focus of less than 1 in 10 grant holders, with 4 in 10 doing some work in racial justice.

When asked to what extent the grant holders are working to advance racial justice, only 8% of respondents considered it as a main focus of their work, while 41% of revealed that some of the work they do focuses on racial justice and equality. A similar proportion of respondents (38%) conveyed that they believe advancing racial justice is important but felt that they do not have the time or resources to engage with this focus area.

An analysis of the challenges that grant holder organisations said they faced while pursuing work in the racial justice realm brought forth 3 major themes:

- Cultural barriers & stigma;
- Lack of funding;
- Societal ignorance / lack of knowledge of the topic.

Figure 3: Percentage breakdown of challenges faced by grant holders while advancing racial justice



Cultural barriers and stigma

Approximately 39% of the 217 grant holders that answered the question relating to the challenges faced by them while undertaking work to advance racial justice cited cultural and linguistic barriers, prevalent stigma against certain populations, and difficulties in reaching diverse target groups as impediments to their attempts. For instance, one respondent noted that one's upbringing matters, and postulated that individuals need to learn how to respectfully refer to those different from them.

Another conveyed that:

“Racial injustice is deeply entrenched in societal systems and structures, making it a complex and multifaceted issue. Challenging systemic racism requires addressing deeply ingrained biases, discriminatory policies, and unequal power dynamics. Overcoming these deeply rooted challenges can be an ongoing and arduous process”.

A grant holder also explained how:

“Language and attitudes are a constant challenge as a large proportion of our customers are European, many non-English speakers and who may not be speaking to their children in English”.

Several respondents also spoke about the difficulties they faced while trying to reach minority groups and encouraging them to engage with their programmes. For instance, as conveyed by a grant holder:

“If it's a small minority group then it is harder to reach as we don't know how to approach them for their ideas”.

Lack of funding

A second theme that was evident post the analysis of survey responses related to 14% of the organisations feeling that the lack of funding and propensity of funders to look at short-term rather than long-term outcomes was a major hurdle to them achieving desired outcomes. For instance, one grant holder articulated that:

“The lack of long-term funding poses a challenge for trying to advance racial justice as it hinders the ability to invest in comprehensive programs, resources, and initiatives necessary to tackle systemic racism, provide support to marginalized communities, and sustain long-term efforts for meaningful change”.

In conjunction with the linguistic barriers mentioned above, a respondent spoke about the issues they face because they do not have enough monetary resources to hire translators:

“Unfortunately, as a small service we don't have funds to access to interpreters or to offer our communications tools in multiple languages, this in turn means there are some clients we are unable to support”.

Concerns were also expressed regarding a surface level funding landscape that may not be able to lead to systemic change for diverse ethnic groups in the long run. For instance, a grant holder conveyed that:

“...funding available generally focuses on dealing with symptoms rather than causes”.

Societal ignorance/lack of knowledge

The third and final theme, as agreed upon by 13% of the grant holders, revolves around wider societal ignorance of the issue at hand, alongside a lack of knowledge amongst both the organisations working to advance racial justice and the general public.

A grant holder attributed the challenges they have faced while working in this arena to a lack of interest from mainstream society. Similarly, a respondent believed that there is:

“A general lack of real understanding of the impact on communities, individuals and families dealing with this issue”.

Responses highlighted that overcoming such ignorance and fostering dialogue is likely to be challenging when dealing with such a sensitive topic.

While numerous grant holders spoke of the lack of collective knowledge and expertise in dealing effectively with racial justice, one respondent particularly took on the issue of data:

“Our main challenge is data collection. Without accurate information about people's ethnic and racial backgrounds it is challenging to open up conversations about racial justice in the SBH Scotland community”.

In addition to ingrained prejudice amongst society members:

“A hostile environment and discriminatory attitudes and policies towards asylum seekers, refugees, and migrants” were also cited as major challenges to advancing racial justice in Scotland.

The remaining 34% of the respondents either answered Not Applicable or did not directly answer the question.

Climate Change

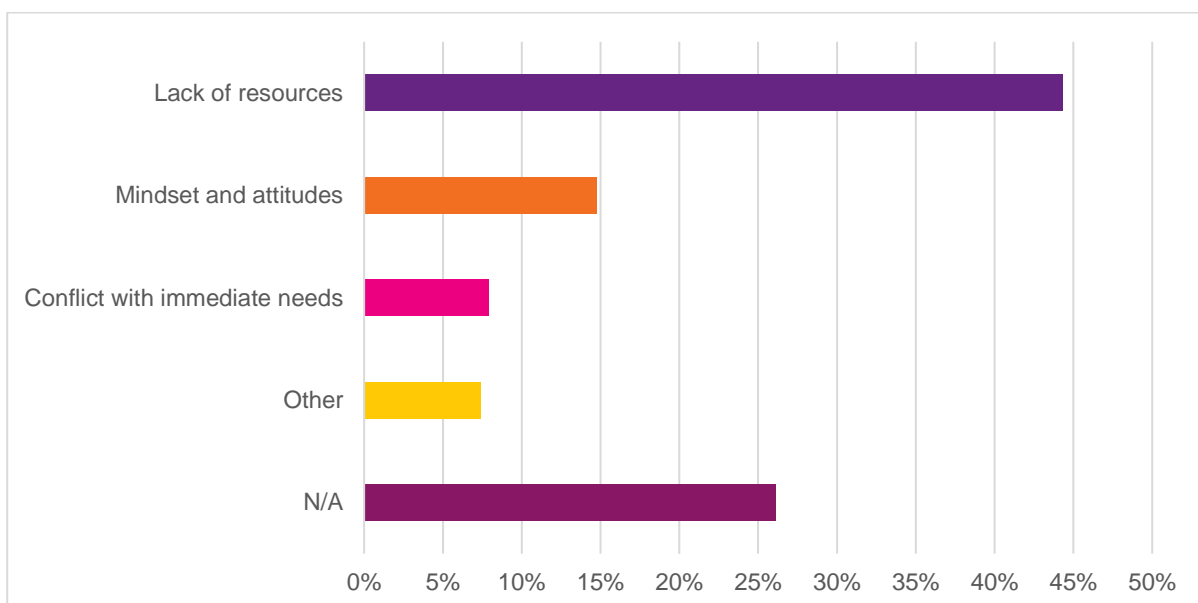
Climate change was least prominent of the four priorities as a main focus for just 1 in 20 grant holders. However almost 5 in 10 were doing some work on climate change.

Out of the 458 grant holders answering whether their organisation is taking or planning conscious action to address climate change, 4% (17 respondents) said it is the main focus of their work, and approximately 48% (220 respondents) said that some of the work they do focuses on addressing climate change. 40% (179 respondents) said they think it's important but don't have the time or resources to engage with the issue. 8% (38 respondents) said they aren't thinking about climate change at all. (4 respondents said they didn't understand what was meant by the question and 10 did not respond to the question).

An analysis of the challenges that grant holder organisations said they faced while pursuing work in addressing climate change brought up 3 major themes:

- Lack of funding, resources, capacity and/or power (including technology issues)
- Mindsets, attitudes and lack of priority for climate issues
- Sensitivities/conflicts over more immediate needs for people living in or close to poverty

Figure 4: Percentage challenges faced by grant holders while advancing climate change action



Lack of resources

44% of the organisations who said they faced challenges in working to address climate change (or 19% of survey respondents overall) cited challenges with resources. This fell into several subthemes.

In some cases, the resource challenge is a fairly straightforward comment about the unavailability of funding, either from local Government or other statutory sources to support programme work.

In communities like ours with many social issues to contend with, with withdrawal of funding from local authorities, who still want to see action in all of these areas you are highlighting, with broader public sector cuts meaning more demand on our existing services and significantly higher running costs our organisation can often feel at tipping point, there is so much we can do or want to do, our staff and volunteers are willing but time and money are always finite. Local Development and regeneration plans often imply pay lip service to these issues which have knock on effects.

Grant holders specifically mentioned a lack of support or resource for technology, energy saving measures and infrastructure improvements for organisations to address climate issues:

[lack of] access to grant funding for larger scale projects, i.e., insulated flat roofing and new windows, more efficient boiler or heat pump systems.

It has been hard work getting the right technology together. We don't really get any support regarding improvements to energy saving in our work environment.

Our building is old and therefore the cost to upgrade heating / windows etc is very expensive and prohibitive, so we could easily be more climate friendly if we had the resources to make specific changes which would reduce our carbon footprint.

For other organisations, there is a lack of internal capacity and expertise to understand and implement climate-related solutions, and the cost of finding this expertise externally is high.

{there is} a lack of knowledge within the team to understand and support it.

The Company at one time found difficulty in identifying just what it could do, given the financial and time constraints it faced. Some guidance needs to be given to registered charities to underline their responsibility. Perhaps in skills sets suggested in previous Sections some direction could be given to Board members and senior staff on climate change.

We had an issue with our solar panels, and it was difficult trying to get someone to help us figure out what was wrong - when it comes to vehicles and solar panels, the technical info can be very tricky.

For some, the sharp end of this capacity challenge is in the choice between addressing climate issues and continuing to provide core services:

We do not have the time and funds to implement the necessary changes. We could apply for funding for this, but our main focus always has to be to secure funding to continue our services.

A particular challenge exists in the costs of switching to electric vehicles for organisations that provide transport services or other services requiring transportation such as delivery and pick up of essential items.

Cost and availability of vehicles are a major issue when looking at EV's. We can't get like for like replacements and can't afford to swap 17-seater buses for smaller versions as it impacts on our ability to run our services. 17-seaters are too heavy to be driven on a normal license or under section 19 permits.

Client work is face to face, therefore involves travel by car/public transport to and from clinics.

Mindsets and attitudes

15% of the organisations who said they faced challenges in working to address climate change (or 7% of survey respondents overall) cited challenges with attitudes and mindsets. Among other challenges, they cited entrenched habits and resistance to change,

We can all remain 'stuck in our ways' or just have habits of not recycling, not switching off lights when not in use etc etc, the challenge is changing mindsets and habits.

A lack of willingness to change and follow advice provided.

Other grant holders pointed to challenges with scepticism or mistrust of messages about climate action:

Some scepticism from people who see it is a 'woke' trendy topic.

Widespread distrust of mainstream services means that we have faced challenges in informing clients of the importance of tackling climate change and being climate conscious.

At the same time, some grant holders noted challenges with pessimism or overwhelm at the scale of climate change.

Feeling that it is all too little, too late!

It can be seen as too big an issue to address locally and when looked at through the lens of multiple deprivation and trauma - can seem less of an emergency. Others perceived a challenge with different demographic or cultural values or beliefs about the importance of climate action:

When families come from different areas, recycling can be different, so it has been challenging for them to adapt to our processes.

Older people can be a bit reluctant to change. In addition to these themes, respondents mentioned a small number of 'other' issues. These included uncertainties about how to measure the impact of their climate action, lack of awareness of what comparator organisations are doing about climate action, and difficulties disseminating ideas about climate action (particularly in a range of service users' languages and accessible formats).

Conflict with immediate needs

8% of respondents noted specific challenges where there is a (real, or perceived) conflict between immediate needs and the longer-term existential challenges related to climate change. In some cases, this means there are attitudinal and/or practical barriers to climate action among grant holders' service users:

People in poverty and disadvantage do not see the climate challenges as a priority for them personally.

A lot of the challenges are around changing attitudes and if there is a cost element, people don't have the finances to make these changes and stick to what they are doing as they can afford to make these changes even that it would save them in the long term.

It's not high on everyone's agenda for different reasons. But in particular if you're living with poverty and trauma and stress climate action is the last thing on your mind.

Some families can find it overwhelming and are dealing with things that they may feel is a more present issue in their life such as the cost of living and poverty. It is not that families don't want to address climate change it is just not what they feel they need to focus on due to mental health, well-being, financial pressure.

In other cases, this means the grant holder organisation needs to prioritise the more immediate needs (such as home heating) of their service users over a more environmentally positive option:

Sometimes there is a conflict with direct support for the needs of those in poverty. E.g., oil heating is the most common type of heating in rural off-grid (Gas) areas.

It isn't always clear what is the best measure to take or thing to do, and there are times when we have to, for practical reasons, or reasons of time efficiency or safety make a decision that is maybe not the best for the climate, but to not do it would have a negative impact on the project outcomes.

There were a small number of other comments not classified into any of these themes, including those relating to language barriers, terminology and complexity, and interest in knowing what others are doing.

Future support needs

For each of these four themes, grant holders were asked if there was anything the Trust could do to support in that area. Themes were repeated across the four areas, so are presented together here. Many respondents noted that with additional funding they could achieve more.

How the trust could help

Grant holders offered suggestions for how the Trust could best enable grant holders to address these themes of Participation, Prevention, Racial Justice and Climate Change.

Long term, flexible funding

Many respondents thanked the Trust for its multi-year core funding, noting that this afforded freedom and capacity to respond to these important issues.

As always, unrestricted funds to help us mitigate some of these issues.

Trust and flexibility (which you do), alongside supporting, encouraging and requiring organisations to work in this way.

Not all grant holders had the same experience of funding from the Trust, and some encouraged the Trust to go further in this regard. Some mentioned the importance of not being proscriptive, seeking to understand the context grant holders are working in. Others mentioned specific thresholds between grant pots which prevented them accessing funds to address these issues.

The funding process

Several respondents noted the importance of the grant manager, and the relationship-based approach they had experienced in working with the Trust as something to build on.

I think possibly just by being there to talk to when we feel we are not making enough progress and to offer advice.

Others noted ways the application process could signal the importance of these topics, and guide respondents in how they design their applications.

Encourage in funding apps the need and importance for people with lived experience to be part of the project and show us through the application why this is, what can we learn from it and what are our aims and objectives in pulling all this together.

Distinctive context of funding prevention

Responding specifically about **prevention**, some respondents made observations about the nature of the challenge and implications for how the Trust could respond.

Maybe be take more of a risk to support programme that are new and are focused on the prevention.

Recognition that offering people the opportunity to break the cycle of generational poverty takes years and so being alongside us for the duration - we will demonstrate impact and it all moves in the right direction ...but its slow.

Anchor funding - recognising that prevention is not a singular activity but rather a sustained pathway.

Years ago, the National Lottery piloted a Lived Experience Leadership Fund that was targeted at lived experience led organisations, championing them and allowing them to form supportive networks. I would love to see other funders take the same approach.

Ring fenced of supplementary funding

Specific suggestions were made for additional dedicated resources to support the themes.

Participation: ensuring the Trust's is happy to pay expenses (travel, refreshments) for participants and is very clear that these expenses are welcomed.

In **racial justice**, a couple of respondents requested subsidised translation support, and access to low cost ESOL training for the communities they work with.

Several suggestions were made for dedicated funding to address **climate change** including reducing the environmental impact of buildings and vehicles.

Additional grant payments akin to the cost-of-living payment that would be ring fenced for initiatives related to climate action would be amazing.

If there was funding available to offset some of these costs, then we would certainly be interested in looking to make changes which would improve of energy efficiency and reduce our impact on the environment.

A powerful voice and convening role

A voice and a national platform

Several grant holders noted that the Trust has an opportunity to speak on these topics: to drive conversations about these themes beyond its grant holder cohort.

Create more awareness on issues of poverty, and abuse. Involve organisations... discuss these issues, and be involved in policy making.

Lead by example and support anti-racist campaigns.

We'd also love to engage more with the national campaigning element of RT... there are some areas that are out with our control but RT, along with other large bodies, has some influence over.

Some noted that to have authority in this role the Trust would need to reflect on its own practices.

I do not know the make-up of your Board but if there is under-representation of ethnic groups on your Board then I would suggest you employ strategies to improve this representation.

Others were keen that the Trust act as an ally to grant holders on the issues associated with funding flows and organisational sustainability, including the importance of unrestricted funding, Others noted the Trust was active on a national level, but that grant holders would benefit from support influencing at a local authority level.

Demonstrating how alternative approaches to commissioning are effective, in comparison to local authorities for example and how that delivers impact.

Amplifying and connecting

A linked theme was the opportunity to amplify the voice of grant holders in these channels, rather than only speaking with the Trust's own voice. Some respondents felt the Trust had a powerful network and could offer connections and networking which might raise the profile of the grant holder.

Promotion of our organisation through your channels.

Knowledge, learning, Funder Plus support

A training and support offer

The strongest theme from respondents was requests for support with knowledge and learning; acknowledging that the strategic themes are complex, systemic problems and it is challenging for organisations to devise their responses individually. Advice, training and consultancy were mentioned frequently. Some respondents were interested in guidance on organisational development topics such as managing risk and leadership.

Training and development or funding organisations like Youth Scotland to provide it.

I believe the answer is in leadership development to develop brave leaders who stay focused on these essential areas (involvement)

Others referenced training, constancy and information on the strategic theme topics (Participation, Prevention, Climate Change and Racial Justice). In Climate Change particularly, respondents were interested to know what 'good' looks like. One suggested a diagnostic questionnaire for the identification of development needs could be useful.

Some direction could be given to board members and senior staff on their responsibilities for climate change.

Some advice about what 'commitment to climate action' might look like for charities whose mission is not related to the environment.

One respondent referenced that the format of the support mattered.

Run a master class rather than a training - sort of Ted talks for lived experience embedded decision making.

Investment in tools and evidence base

Some respondents felt the Trust could play a role building the evidence base to help grant holders understand and influence others on the importance of prevention.

The availability of good quality information, not just statistics but on the cause, nature and impact of gender-based violence is vital for prevention.

Others referenced challenges around evaluation, with suggesting about how the Trust could make it easier for grant holders to demonstrate the value of their work.

How to evaluate where preventative work stops someone from engaging in a behaviour / activity which is detrimental to them and others.

Investment in developing standardised evaluation systems for preventative work, so that we are not continually having to explain what we are trying to do.

Learning from other grant holders

A common theme from respondents was interest in learning from peers who were grappling with these challenges. Respondents felt the Trust could bring grant holders together to discuss the approaches they had taken.

Network of innovators to share learning and the growth of being curious to new ways of working.

We would appreciate a city conference where we could listen to and learn from other projects that have made a significant contribution in this area [climate].

Networks that can exist of people in the same geographic area or working in the same theme can be really useful, in terms of joining services up or sharing good practice.

Others were interested in case studies and examples of good practice—this is particularly true in relation to the Racial Justice and Climate Change themes.

Exchange of good practice - where has this worked well to get lived experience into the direction of the organisation as a whole.

Giving examples of where organisations have successful approaches to this would help as sometimes the thinking can be a bit stuck. [Involvement]

We would welcome information on what other organisations are doing to embed environmental changes/considerations in their service delivery.

Highlighting 'best practice' from some of the organisations you support.

Conclusion

When describing their work in their own words, grant holders responses clustered into several overlapping themes: Individuals able to lead financially stable, sustainable and independent lives; Individuals leading healthier lives, supported emotionally and holistically; Cohesive and connected communities; Individuals and families able to access basic necessities in times of poverty and cost of living challenges. It is interesting to note that while three of these relate to individual or family changes, one relates to changes at a community level. It is interesting to note that two categories align well with the Trust's strategic themes (Emotional relationships and well-being; Financial security). There is a less explicit link to the themes of Education pathways and Work pathways.

It is clear that grant holders are very aligned with The Robertson Trust's strategic priorities when it comes to Participation and Prevention. The priorities of Racial Justice and Climate Change are less strongly represented. This is a prompt for The Robertson Trust as it continues to embed these priorities, in terms of the partnerships it builds, and the way resource is directed.

While the challenges of working in alignment with these priorities have been analysed separately, there are themes which repeat across the four priorities. It is perhaps not surprising to see that in all four priorities, resource constraints were an important barrier to doing more. In Racial Justice and Climate Change there was a theme about the readiness of the public to grapple with this issue. In Prevention and Participation, grant holders recognised a duty of care to the communities they work with and needed to be careful about making requests of them in respect to their mental health, capacity or other circumstances. In Prevention and Climate change there was a sense of the challenge in prioritising long-term work alongside more urgent needs.

Grant holders shared rich suggestions about how the Trust could help them in further addressing these priorities. It is interesting to look at this alongside the relatively low awareness and take-up of the Trust's Funder Plus support, and it would be valuable to draw on these insights when the Trust explores how to develop that offer.