



Annual Review
2019

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Thanks to all the organisations which provided photographs for use in this report, incl. COVEY, Toonspeak, Fruitmarket and Upland.
Photos p6: Top left © Brian Hartley, bottom left © Kevin Main; p19: Left © Colin Tennant

Main image: Nevis Ensemble, Scotland's street orchestra in action
Front cover image: Games and graffiti at Speyside Youth

Chairman's message

AS I write this reflection on last year, it's from a viewpoint that seems both surreal and very real, with the UK in coronavirus lockdown.

Many of the challenges faced by our grantees and the communities they support are amplified hugely by this crisis. Many of the needs now are more acute versions of what existed already. As in most humanitarian crises, it will be people already living with disadvantage who are most at risk of harm, and of being ignored.

As a grant-maker, much of what we have learnt in 2019 and over the last five years will continue to inform our approach through 2020. We have taken on board the vital importance of understanding needs by listening carefully to what our grantees tell us, and



of giving them flexibility in how they use the money we can offer, recognising that they are the experts in responding to the needs of their communities. Those needs will shift even more quickly this year, of course. We trust our grantees to respond deftly and we know they'll do so with huge energy.

We've also learnt about looking beyond the horizon of a single year. We aren't the largest funder in Scotland so our impact in any 12-month period is limited, but we've inherited from the William Grant business and family an appreciation that we can contribute to change that is potentially profound in the long term. In practice, that means being open to supporting strategic investments in social, cultural and environmental capital even when the

pressure of the coronavirus emergency makes it hard for our grantees to achieve some short term goals.

The challenges of this crisis, and our responses to it, are still playing out. Writing next year's Annual Review will be an uncommon task. But I am confident we'll be able to look back on extraordinary things achieved by the people of Scotland to get through the crisis and to begin recovering from it.

Meanwhile I want to thank my predecessor as Chair of the Foundation, Grant Gordon, the staff and volunteers of our Foundation for their efforts last year, and to acknowledge the efforts and imagination of the voluntary sector organisations and people who share our vision of Scotland as a place where everyone has an opportunity to thrive. ●

Nigel Woof
Chairman
April 2020

"I am confident we'll be able to look back on extraordinary things achieved by the people of Scotland to get through the crisis"



Chief Executive's summary

2019 was a milestone year: Our fifth anniversary; we passed £10 million distributed to good causes in total; and donated more than £3 million in one year for the first time.

We took the opportunity to review our operations and consider if the way we'd been working was still appropriate as we look ahead. Should we continue to divide our activity according to the same themes we started out with? Do we need to develop new capabilities to remain effective? What are the implications of continuing to grow the scale of our giving in line with the success of the William Grant & Sons business from whose profits we are funded?

Our conclusion was to build on our previous work and the relationships we've established to date, retaining our four key themes to maintain both a broad, flexible scope while nurturing opportunities for focused learning and impact. But we now manage well over a hundred live grants at any one time so, in 2020, we will add another member to our small staff team. We want to ensure our partners' experience of engaging with us is consistent, and that we capture and apply intelligence and learning

"We have sought to maintain a progressive focus on learning across all our activity."

as we go, to inform our future decisions.

Those decisions become increasingly important as we seek to apply our resources as effectively as possible. Having started out in 2014 working with who and what we knew at the time, we have sought to maintain a progressive focus on learning across all our activity. There will never be a definitive answer to the question "Who and what should we fund?" but through reflection and learning we aim to develop knowledge and insight that will drive us closer to the best answer we can practically find at any point in time.

Our interests are broad and diverse, and

– when there are so many opportunities for philanthropic funding to make a difference – our challenge is increasingly to decide what *not* to support. We now know these decisions about priorities will be ever more important during the year ahead as we begin to realise the severity of the Covid-19 pandemic and its implications for our society and economy.

Ultimately, our work is all about people: people benefiting from the activities our funding supports; people working with skill, passion and commitment in the many charities and organisations we are privileged to fund; and the people in William Grant & Sons and our own Foundation who make what we do possible. In the following pages we focus on a few of their stories. I hope you enjoy reading them. ●

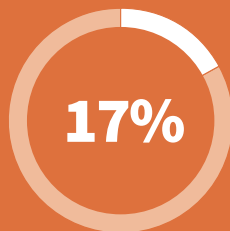


Nick Addington
Chief Executive

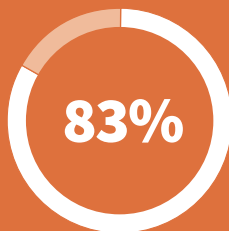
2019 in numbers

109
grants paid to

97
organisations
(excluding grants <£2K)



(19 grant payments)
related to existing
multi-year
commitments



(90 grants)
were new
grants approved
this year

AVERAGE GRANT SIZE

£25,700

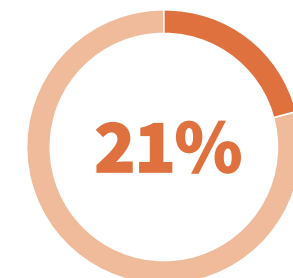
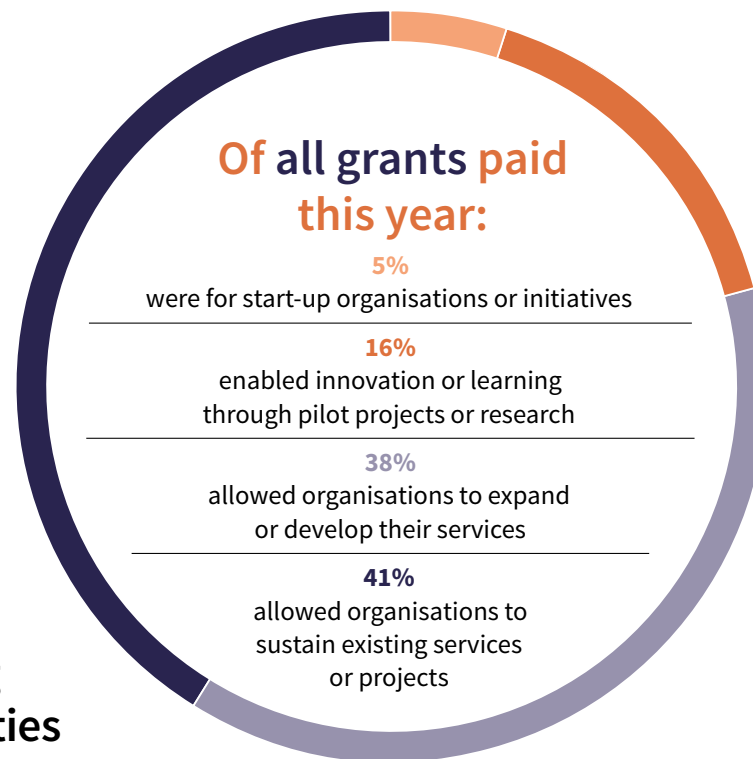
50% of our funding relationships
extend for 3 years or more

TOTAL GRANTS PAID THIS YEAR:

£3,160,890

A further £1,552,788 is committed for payment over the next two years.

342 employees used the William Grant & Sons Matched Giving scheme to support 226 charities



19.5 full-time equivalent jobs were created or sustained specifically thanks to our funding – our unrestricted grants will have supported more, too

9 grants related to buildings or equipment – £298,850 was given for capital spending, 9.5% of this year's total

5 grants were collaborations with other funders – representing 22% of our total grant-making this year

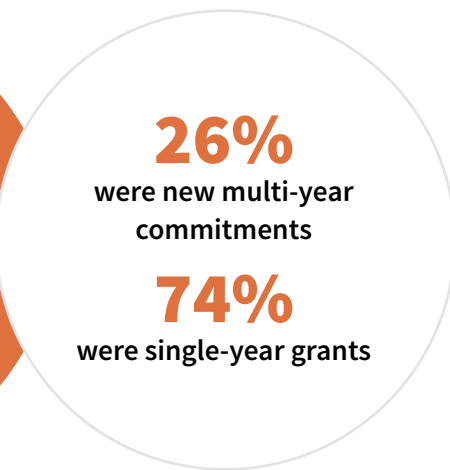
9 grants supported the replication of programmes or new ways of working that have been proven to work elsewhere

15 grants specifically enabled grantees to undertake research or to promote learning

13 grants specifically focused on strengthening organisations and building their capacity

8 grants supported campaigning, advocacy or policy work by grantees

Of the 90 new grants approved this year:



Our grant-making



NOT everyone in Scotland has the same opportunity to thrive. Approximately half of our funding is therefore given to support work to remove barriers to opportunity and reduce disadvantage.

But for people to thrive, we believe we must also nurture strengths and talents, and protect, promote and sustain the country's cultural and physical environment. This is about strengthening Scotland's communities today and also inspiring people for the future. The second part of our mission is therefore to fund initiatives and organisations in the fields of culture, heritage and environment.

Operationally, since the Foundation's creation in 2014, we have divided our grant-making into several strands which continue to define our structure.

Four of these reflect different aspects of our broad mission and are focused exclusively in Scotland:

- Health and Social Causes
- Youth Opportunities
- Natural and Built Environment
- Scottish Culture and Heritage.

Although these key themes represent our long-term interests, the precise focus of our giving under each of them continues to evolve as we learn more about how and where we can make the biggest difference.

A fifth strand, Employee-led Giving, is delivered in partnership with William Grant & Sons and supports causes chosen by the company's employees in the UK and around the world.

Finally, in 2019 we made a small number of exceptional awards to enable organisations to achieve a 'step change' in their impact, capacity or sustainability. ●

On the following pages, you can read more about each strand of our giving and find a list of all the grants we paid out during the year.



Coronavirus and the year ahead

AS we were preparing this report looking back at 2019, the coronavirus pandemic was unfolding in the early months of 2020.

This has transformed the context for our work and affects everything we do. All our existing grantees are affected and our selection of new funding opportunities has to reflect the different world we now inhabit. Our grant-making in 2020 will not look like it has in previous years.

At the outset, we reassured all the organisations we already supported that any money we had paid or pledged during this year could be used flexibly to respond to the challenges they faced. We continue talking to them about what they need as the crisis progresses.

We earmarked our available reserve funding – over one million pounds – to respond to the crisis, and initially supported a number of urgent response

initiatives with grants totalling over £260,000, mostly delivered in partnership with other funders. We also increased funding available for the company's Employee-led Giving schemes which support the efforts of William Grant & Sons employees across the world who are taking action in their own communities.

Looking ahead, we know people, communities and charities will need support through the remainder of the crisis, and then need to recover and adapt again to the altered environment and continuing challenges we will face once the immediate pandemic is over. We are resolved especially to support

“We aim to look both at and beyond the current crisis to ensure people and communities can be ready to thrive again.”

people and communities that were already marginalised, in poverty, or living with multiple and complex challenges before the crisis, as they are most likely to be severely affected by it.

But we also recognise the importance of culture, environment and heritage in helping people and communities to thrive. Although the early response to the crisis rightly focuses on emergency humanitarian and social needs, if we want our communities to be great places to live as we recover, we will need our artists and makers and our natural and built environment – and the organisations that sustain them all – to be resilient. We therefore remain committed to our four core themes but will review our strategies within each of them. We aim to look both at and beyond the current crisis to ensure people and communities in Scotland can be ready to thrive again. ●



Health & Social Causes

UNDER this theme, we continued to focus on two topics:

Living well with long-term or life-limiting health conditions

We renewed our partnership with the Alliance, contributing £150,000 to its Self-Management Fund. As a result, seven more organisations received funding to support people to stay in control of their chronic health conditions. Our grants to WHALE Arts in Edinburgh and Ayr Utd Football Academy are helping us learn how activities linked to arts and sport respectively can help improve wellbeing. During the year, Life Changes Trust published research we had funded into the potential for technology to benefit people affected by dementia, and we look forward to working more with them on this topic in the future.

Supporting families and improving life chances for disadvantaged young people
Several grants resulted from a new

partnership with the Cattanach Trust, which has both re-granted funds on our behalf and introduced us to organisations working with parents and children in the critical first 1,001 days of life. For example, the Dean and Cauvin Young People's Trust in Edinburgh will use our grant to support young mothers who have grown-up in care as they transition from residential care into independent living, helping to give their own babies the best start to life. We continued to support care-experienced young people more generally through our funding for MCR Pathways' mentoring scheme and have been keeping in touch with the work of the Independent Care Review. We will consider its findings and recommendations in the year ahead.

During 2020, we will continue working with our existing grantees under each of these two themes but any new funding relationships will have a focus on mitigating the impact of the coronavirus pandemic. ●



Libby Dawson sorts donations at 3D Drumchapel's baby bank



Informal and friendly support at Maggie's cancer care centres

CASE STUDY

3D Drumchapel

An all-round approach to supporting families

LIBBY DAWSON has lived all her life in Drumchapel in north west Glasgow and is bringing up her own three children there. Until the birth of her first baby, Libby worked full time – by her own admission she’s a real workaholic.

But then things changed significantly. She was diagnosed with post-natal depression, fuelled by a lack of confidence in being a new mum and feelings of isolation.

She was referred to 3D Drumchapel, a local charity which works with children and families.

It’s not always been easy, but life for her and her family has improved ever since. Starting out with the baby massage group, she describes her first involvement with the charity: “They took me

“They took me under their wing and welcomed me with no pressure. It felt easy to be there, I felt able to confide in them.”

under their wing and welcomed me with no pressure. It felt easy to be there, I felt able to confide in them and I made new friends with other mums who remain good friends today.”

Libby continued to be involved with 3D through the births of all three of her children and she sees the people there as part of her extended family. “I’ve not missed a mum’s group in 16 years – it’s my me time.”

Her role with 3D changed after she had her third child and she took part in a personal development course. “It switched a light on for me”.

With newfound confidence, she jumped at the chance to volunteer with ‘Bairn Necessities’, a baby bank project which provides families with new and pre-loved clothing, toys and equipment. Libby has been instrumental in helping it grow from a few boxes in a cupboard to a larger operation with its own premises; she is part of the drive to develop it into a social enterprise and is leading



the way with its operations and referral system.

Now she’s embarking on a community development course through 3D and has just started a new job. “3D helped to shape me and get me back to being the person I was. I can’t imagine Drumchapel without 3D – many would be lost without them.”

Our grant is providing 3D Drumchapel with flexible funding at a key point in its development. The charity aims to move out of its rented space in a community centre and into dedicated premises with space to run its own outdoor nursery. ●

Our grant:
£50,000

Health & Social Causes grants paid

YOUNG PEOPLE AND FAMILIES

Cattanach Charitable Trust
– *early years grant-making*
£90,783

Saheliya
£17,393

MCR Pathways
£70,000

Dean and Cauvin
Young People’s Trust
£15,000

3D Drumchapel
£50,000

Early Years Scotland
£10,000

Family and Community
Development West Lothian
£30,000

LIVING WELL WITH LONG-TERM CONDITIONS

Health and Social
Care Alliance
– *Self Management Fund*
£150,000

Ayr United
Football Academy
£25,000

Breast Cancer Now
£50,000

Leuchie House
£20,000

Maggie’s Lanarkshire
£30,000

Scottish Book Trust
– *Reading is Caring project*
£10,000

WHALE Arts
£25,635

Scottish Men’s Sheds
Association
£5,000

Natural & Built Environment

OUR grant-making relating to this topic has developed to address a number of sub-themes.

For the last two years, our environmental focus has been on marine and aquatic ecosystems – important for Scotland, but poorly supported by philanthropic funding. Most of our grants this year have supported a variety of research and education initiatives. These include: a marine research handbook for coastal communities (Scottish Natural Heritage), freshwater biodiversity monitoring and outreach (Centre for Ecology & Hydrology), the scoping of an investigation to identify herring spawn sites in the Hebrides (Skye & Wester Ross Fisheries Trust) and marine-focused outreach, teacher training and primary school loan boxes (Scottish Seabird Centre).

This year we expanded our grant-making around energy efficiency in homes – with the aim of reducing both carbon emissions and fuel poverty. Whilst maintaining support for work to influence relevant national policies via continued funding for the Existing Homes Alliance and its work on the national Fuel Poverty Strategy, we increased our investment in efforts to directly support people affected by fuel poverty. Most significantly, we partnered with Energy Action Scotland to run a challenge fund for its members to test ways of delivering advice and practical support to vulnerable households around the country.

Our funding for capital projects focuses on the development of community assets, buildings which

provide social and community benefits in addition to their heritage or design value. We try to use our limited funds in a timely way to make the maximum difference. In the case of Oban's Rockfield Centre, our 'last brick' grant is helping them complete their funding package for the former primary school in order to complete its redevelopment as a community centre before costs escalate. Whilst our continuing partnership with the Architectural Heritage Fund is providing tailored funding for early stage projects that need small amounts to overcome barriers to progress. Finally, our grant to Community Enterprise is supporting the exploration of innovative ways of delivering more community-led regeneration projects like these in a challenging funding environment. ●



Survey work at Loch Leven by the Centre for Ecology & Hydrology



Ian Young, pictured left, and volunteers

CASE STUDY

Bannockburn House Trust

Volunteering to protect Scotland's heritage

BANNOCKBURN HOUSE, a 17th Century A-listed mansion and former headquarters and refuge to Bonnie Prince Charlie, lies hidden and undiscovered for most people in Scotland.

However for Ian Young, it's a place he's known all his life. When the opportunity came up for the local community to buy and restore it, he jumped at the chance to get involved.

Ian, aged 69, was born and bred in Bannockburn, just outside Stirling, and has strong childhood memories of the House: "My grandparents took me for walks, and Bannockburn House was one of the places we went. I always admired it, but we could never get inside to see it."

Now retired, Ian's background in managing large construction projects means he brings valuable knowledge and skills to the restoration project. Currently, he is advising on roof repairs, internal restoration and is working with architects on the project the Foundation is supporting – the installation of essential toilet facilities. He

has also ensured that correct health and safety policies and procedures are in place and enforced – he's very strict on this!

Being involved has benefited Ian in many ways: "I am back in contact with old friends – and am making new ones, too – and

I have a busy retirement using and sharing my skills. I am interested in Scotland's historic buildings – so getting hands-on with this one is really exciting! And I'm learning lots, including that I may have a family connection with previous

House owners.

"I am proud of what the Bannockburn House Trust is achieving – it was a sad old building and it is rewarding that we are saving it. Bringing it back into use will benefit local people in many ways."

Our early-stage grant means that the Trust can install much-needed toilet facilities in the House courtyard – significantly improving the experience for everyone on site, whilst fundraising for more substantial renovation continues. ●

Our grant:
£60,000

Natural & Built Environment grants paid

MARINE AND AQUATIC ENVIRONMENT

Hebridean Whale and Dolphin Trust
£38,142

Skye & Wester Ross Fisheries Trust
£36,000

Centre for Ecology & Hydrology
£30,500

Scottish Natural Heritage – *Community-led biodiversity monitoring*

Scottish Seabird Centre
£20,000

Skye and Lochalsh Environment Forum
£8,500

OTHER GRANTS

Scottish Environment Link
£20,000

Clyde & Avon Valley Landscape Partnership
£15,525

Other small grants
£2,500

COMMUNITY ASSETS

The Architectural Heritage Fund – *Tailored Support Fund*
£107,000

Oban Communities Trust – *Rockfield Centre*
£60,000

Bannockburn House Trust
£60,000

Scottish Civic Trust – *My Place Mentoring*
£20,000

Above Adventure
£17,250

Community Enterprise Limited
£11,600

ENERGY EFFICIENCY AND FUEL POVERTY

Energy Action Scotland – *Fuel Poverty Challenge Fund*
£180,000

Changeworks Resources For Life
£30,000

Existing Homes Alliance Scotland
£16,500

The Pebble Trust
£9,600

Scottish Culture & Heritage

FOUR aims continue to guide our grant-making under this theme:

- Preserving, researching and showcasing aspects of Scotland's heritage – especially those at most risk – in ways that enrich and inspire people today
- Nurturing creativity, skill, innovation and craft to promote a thriving contemporary cultural sector rooted in Scotland's heritage
- Engaging and connecting people as participants – not just audiences – to creative activities inspired by Scotland's distinctive cultural heritage
- Making culture inclusive by creating opportunities for those who face barriers to participation to genuinely engage and contribute to Scotland's cultural scene.

We continue to build relationships with some of Scotland's national cultural institutions whilst also supporting a range of smaller organisations whose work we find exciting, promising or important and for whom our funding can make a significant difference.

Recognising the value of longer-term funding, we made several new three-year commitments in 2019. These included grants to Hospitalfield contemporary arts centre in Arbroath to employ a Public Engagement and Volunteer Manager, to the award-winning Cumnock Tryst festival in East Ayrshire to support its continued development, and for the expansion and promotion of the new Highland Book Prize, which aims to put writing from and about the Highlands on the literary map.

Looking ahead, we know that many activities will be unable to take place as planned in 2020 due to measures to control the coronavirus pandemic. We're committed to being flexible with our support to give our grantees the best chance of adapting and surviving during this period. A strong focus has emerged during the crisis on maintaining access to cultural experiences and opportunities. A thriving cultural scene will be essential to Scotland's recovery and future resilience. ●



Nevis Ensemble sharing the joy of music



Gerardo Cruz, finding connection and purpose thanks to Glasgow Barons

CASE STUDY

Glasgow Barons

Rebuilding confidence through music

“I arrived in Glasgow from a difficult situation, we lost everything... For a musician, losing your musical instruments is like losing part of yourself.”

In El Salvador, Gerardo Cruz, 25, was a medical student and a talented, self-taught musician. Arriving with his family in Scotland in 2019, he found himself in Govan, Glasgow, looking to create a new life in the city. He was quickly introduced to the Musicians in Exile project run by the Glasgow Barons. This brings together asylum-seeking and refugee musicians – providing instruments and space where they build relationships, create music, and rehearse for regular live performances.

Founded in 2017, Glasgow Barons creates community music projects with and for the people of Govan. As well as performing professional orchestral concerts in local venues, they devise and deliver hands-on creative programmes across a wide range of musical genres. The charity is using music to build local pride and to foster self-confidence, connection and resilience.

Gerardo, who plays multiple



instruments but principally guitar, is now a regular member of Musicians in Exile. Although settled in another part of the

city, he makes his way to Govan each week to take part. The group is a real cultural mix – from Spanish to Scottish to Iranian, and from heavy metal to classical, and everything in between. “We make the songs

our own, create something different and try new instruments. I enjoy learning from people from different cultures. It’s a place I feel comfortable, where I can enjoy and share music – and it’s really helped to improve my English.”

Musicians in Exile has been a lifeline: “We didn’t know what to do and we didn’t speak English. Finding this has helped with the stress, helped us settle in, make friends and get to know the city.” As well as making music again, Gerardo hopes one day to return to his medical studies.

2019 was the second year we’ve supported Glasgow Barons, helping the young charity to pursue its growing ambitions to build community through music. ●

Our grant:
£30,000

Scottish Culture & Heritage grants paid

National Museums Scotland £49,115	Dumfries & Galloway Arts Festival £21,000	Travelling Gallery £14,000
V&A Dundee £45,800	The Prince’s Foundation – <i>Future Textile project</i> £20,000	Nevis Ensemble £10,000
Royal Conservatoire of Scotland £40,000	Craft Scotland £20,000	Highland Book Prize £10,000
Piping Live! Festival £32,920	Sistema Scotland £20,000	The Argyll Piping Trust £10,000
National Piping Centre £36,000	Hospitalfield £20,000	Scottish Ensemble £10,000
Historic Environment Scotland – <i>Craft Fellowship</i> £31,042	Scottish Contemporary Art Network £20,000	Bernat Klein Foundation £9,632
The Glasgow Barons £30,000	Scottish Schools Pipes & Drums Trust £30,000	Glasgow Print Studio £9,000
Aproxima £30,000	Other solo piping competitions £16,600	Upland £7,500
The Cabrach Trust £25,000	The Cumnock Tryst £15,000	Ostrero £5,900
Arts & Business Scotland £25,000	Textile Conservation Foundation £15,000	Panel £5,000
The Fruitmarket Gallery £25,000		Clan Grant Society £4,450

A further £26,278 was expended on small grants and activities to support the organisations funded

Youth Opportunities

THIS strand of our giving focuses on young people living near William Grant & Sons locations: Dufftown in Moray, Bellshill in Lanarkshire and Girvan in South Ayrshire.

Evidence shows that strong and trusting relationships are critical to the development of confidence and resilience in young people. This in turn affects their capacity to access opportunities and make the most of life chances. Our sustained support to key local youth organisations like Girvan Youth Trust, Speyside Youth and YMCA Bellshill enables youth workers and volunteers to develop and maintain those trusted relationships with many young people in our communities.

We also recognise the importance of the early years on outcomes for children in later life and continue to invest in projects supporting vulnerable parents and young

families such as Stepping Stones for Families in South Ayrshire and One Parent Families Scotland in North Lanarkshire.

We've heard from young people themselves that sport and adventure activity is something they'd like more access to in rural communities. New grants this year included support for Outfit Moray's outdoor education programmes and a new surface for Girvan FC's five-a-side pitch.

In 2019, we also extended our support to help local schools meet basic needs and increase equality of opportunity for their most disadvantaged students.

As we grapple with the effects of the coronavirus pandemic in 2020, we'll seek to learn from all our local partners how our grant-making can help to mitigate the impacts on young people and their families. ●



Sharing new experiences as part of the Mark Scott Awards



Striding towards a positive future, Speyside Youth's Amberlie McKeown in Dufftown

CASE STUDY

Speyside Youth

Helping young people fulfil their potential

AT the age of 16, Amberlie McKeown is pretty clear what she wants to do with her life. Currently planning for a degree in criminology and law, she credits Speyside Youth for helping her shape her goals and get ready for future success.

As chair of the charity's youth committee she is an enthusiastic ambassador, recognising the valuable support it provides for her and her peers.

Speyside Youth was set up with backing from the Foundation in 2015 to address a lack of youth work provision in Dufftown and the surrounding villages. With emotional wellbeing, mental health and social isolation affecting many young people in the area, the fact that most services were based in Elgin, 18 miles away, meant they often struggled to access support or suitable activities.

The charity's weekly youth café nights in Dufftown have quickly become very popular and are attended by young people from all the neighbouring villages and schools – providing a safe, fun place to get together and access non-judgemental help and support.

This can come from the charity's professional youth workers, volunteers or from peer volunteers like Amberlie and the Youth Committee, who also ensure that everything is led by the young people themselves.

"Young people here can be very isolated, and this can be especially

hard when you are moving up to the High School... but if you have been involved in Speyside Youth then you'll know a lot of people who are already there.

I can really see the confidence of younger and newer members growing with their involvement."

Amberlie's time on the youth committee has given her a raft of new skills, qualifications and life experience. She organises team events and fundraisers, represents young people at the charity's board meetings, and has set up a lunch club at Speyside High for pupils in S1-3 who are looking for a safe space. "I love the organising side of it and getting involved with people I wouldn't normally meet. Recognition for my volunteering will help with uni and future employment and I'll use the leadership and communication skills I have developed in many situations." ●



**Our grant:
£10,000**

Youth Opportunities grants paid

MORAY

Elgin Youth Development Group
£30,000

Aberlour Child Care Trust – Youthpoint Moray
£30,000

Outfit Moray
£25,000

Speyside Youth
£10,000

Action For Children
£10,000

Moray School Bank
£7,500

Quarriers – Carers Support Service Moray
£5,000

Elgin High School
£2,500

Speyside High School
£2,500

LANARKSHIRE

COVEY – Pathways to Confidence (FS)
£75,000

Home-Start North Lanarkshire
£47,197

COVEY – Angels youth group
£28,953

Cardinal Newman High School
£15,000

Bellshill Academy
£15,000

The Outward Bound Trust – Mark Scott Awards
£15,000

COVEY – Pathways evaluation
£14,672

YMCA Bellshill & Mossend
£14,340

REACH Lanarkshire Autism
£14,286

SOUTH AYRSHIRE

Girvan Youth Trust – core costs
£35,000

Girvan Youth Trust – Project Search
£28,442

Adventure Centre For Education
£25,148

Girvan Community Sports Hub
£23,000

Girvan Football Club
£20,000

Stepping Stones for Families (FS)
£18,750

First Port – What If? social enterprise development programme
£15,200

Girvan Academy – leadership academy
£15,000

Glendoune Community Association
£5,040

Carrick Academy
£2,500

Girvan Academy
£2,500

Grants marked (FS) are routed through our grant-making partner Foundation Scotland.

During this year we also supported these additional organisations through Foundation Scotland from grants approved in previous years:

- One Parent Families Scotland
- Action for Children – North Lanarkshire Young Carers
- Carrick Centre

Step Change Awards

OVER and above our regular grant-making, this year we created the Step Change Awards programme.

Its purpose is to support a small number of exceptional charities to achieve a measurable 'step change' in their capacity, impact or sustainability. Each award is a one-off investment of up to £200,000 – to be used over one to three years.

We invited a selection of our previous grantees to propose how they would use such an award, together with a small number of charities nominated

by another funder, Inspiring Scotland, whom we commissioned to administer the application process on our behalf. The four awards listed here were selected from the proposals received in March 2019.

We had planned a second round of Step Change Awards in 2020, targeted at cultural and environmental organisations. Instead, the funds we had budgeted for these will now be set aside to allow the Foundation to respond flexibly to the coronavirus crisis later in 2020 and 2021. ●

Grassmarket Community Project, Edinburgh: £89,145

The Step Change Award completes the funding package for an extension to their city-centre facility which accommodates a wide range of activities and services for the community, including many of the city's homeless and most vulnerable residents. The extension will also increase income for the charity through a café and by letting space for meetings and events.

Early Years Scotland: £200,000 over 3 years

This national charity supports the early learning and childcare sector, including nurseries, playgroups and parent and toddler groups. Their Step Change Award will enable them to create a virtual learning centre, using interactive video and online resources to upskill and train the early years workforce across Scotland, which is expanding as a result of a Scottish Government commitment to increase the number of hours of paid nursery provision.

Breast Cancer Now: £167,650 over 2 years

Breast Cancer Now's vision is that every person affected by breast cancer receives the best possible treatment, information, and support. Step Change funding is enabling them to embed a new service delivery model to extend their reach across the Highlands and Islands. New key staff will be appointed to undertake an intensive period of development work and partnership-building which will enable their service to be delivered there sustainably in years to come.

COVEY Befriending, Lanarkshire: £126,243 over 3 years

COVEY supports young people who face barriers to opportunity for reasons such as disability, family circumstance or poor mental health. It does this by matching them to trained volunteer befrienders and mentors who meet regularly with them to pursue interests, broaden horizons and build confidence. The Step Change Award will enable COVEY to provide befriending services for a greater number of isolated and marginalised young people and generate independent income for the charity using Self-Directed Support payments.

Left: Outdoor play at Family & Community Development West Lothian





“It has improved my life enormously and given me confidence and freedom to speak about what I want and need.”

CASE STUDY

Breast Cancer Now

Bringing breast cancer support to the north of Scotland

WHEN Maureen Davidson, a busy grand-mum of three from Inverurie in Aberdeenshire, was diagnosed with secondary breast cancer in 2017 it was a traumatic time. She initially said no to treatment, but changed her mind after spending time with family and discussing it with her doctor.

On starting chemotherapy, a nurse handed her a leaflet about a new support group, ‘*Living with Secondary Breast Cancer*’ – part of a small portfolio of Breast Cancer Now (BCN) specialist support services being piloted in the area. It brings together women in the same situation providing a safe space to discuss their treatment, challenges and progress, get practical support and socialise. Initially Maureen was sceptical: “I’m not usually one to go to groups or speak out.” But she gave it a chance and nearly two years on she is its biggest champion.

“We offer support to each other in a way that others cannot – we understand the emotions that each other feel and we can help each other digest and make sense

of our condition and treatment. It has improved my life enormously and given me confidence and freedom to speak about what I want and need.”

Until now, BCN has been unable to establish sustainable provision of this sort of support in the north of Scotland. The Foundation’s funding is helping to change this. Dedicated specialist staff for the region will now be there for more women affected by breast cancer no matter where they live, including in isolated rural communities.

Motivated by her experience, Maureen has now raised over £2,300 for BCN through hosting afternoon teas, and she supported the charity’s national fundraising and awareness raising work by modelling in their annual fashion show. She continues to be involved in her Living with Secondary Breast Cancer group.

“It has brought new friends, fun and laughter into my life, without them I would be much worse off. They have become an important support network for me – I just love them!” ●

Our grant:
£167,650
over 2 years

Employee-led Giving

IN addition to its grant-making in Scotland, the Foundation makes funds available to support the charitable interests of William Grant & Sons employees wherever they are in the world.

The company operates two schemes which are supported by the Foundation: Matched Giving and Local Giving.

Local Giving

William Grant & Sons company locations are allocated a budget for making donations to local charities. The employees at each site decide which causes to support.

Matched Giving

A matching donation is made to double the money raised or donated by individual employees for their own chosen charities. We also make a donation to match every hour an employee volunteers in their own time.

A passion for purpose

Supporting employees to make a difference

WITH a background as a charity fundraiser, William Grant & Sons' Employee-led Giving and Volunteering Lead, Catherine Allan, knows just how much our employees can make a difference.



“Having worked for a breast cancer charity supporting fundraising volunteers, I really appreciate the

contribution every supporter makes. Whether raising money, giving time or donating financially, these

individual acts really add up to help the cause.”

Since joining the company in 2019, Catherine has supported the roll-out of our Local Giving scheme, with sites in 26 countries due to participate in 2020, and recently added employee volunteering to her remit.

Her role is a new one, with the purpose of increasing impact by co-ordinating charitable initiatives and corporate volunteering across our global workforce. “It’s a great opportunity to harness everyone’s

energy and commitment,” says Catherine. From Australian colleagues organising a fundraising boxing tournament to staff in our Richmond HQ volunteering with a homeless charity on Christmas day, there’s no shortage of ideas, inspiration and stories to share.

On a personal level, she’s delighted the Matched Giving scheme will both double her regular donations through payroll giving and recognise the free time she gives up to help organise community events in her village. But it’s the potential of her role that really motivates her: “I believe working together for good causes helps to build teams and engage employees. It’s good for our company and our communities. I’m excited about what we can do together.” ●

Matched Giving

Total donated

£127,533

(2018: £151,590)



342
employees

supported
226
charities



EMPLOYEE CONTRIBUTIONS MATCHED

(BY VALUE)

Fundraising
56%

Personal donations
20%

Volunteering
12%

Payroll giving donations
12% (UK only)

Local Giving
£169,838

(2018: £143,850)

Donated to charities local to William Grant & Sons sites in UK, Ireland, US, Russia, Australia and Taiwan.

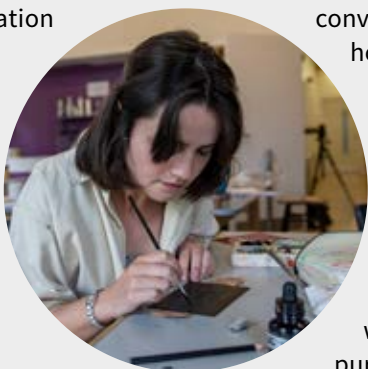
How we work

OUR strategy is to seek out the right partners across our various themes, work with them in a way that enables them to get the most value from our funding, and learn from each relationship.

The success of our mission depends on the organisations we fund and work with, and we aim to be a valued and constructive partner to them.

As a relatively new foundation we are open-minded and interested in learning. We are also independent and flexible. These characteristics give us particular opportunities to add value:

- We can look beyond short-term projects and immediate impact to enable organisations to improve, innovate and thrive over the long term
- We can make the right grant at the right time
- We can make grants in circumstances when other funding can be hard to find. We proactively identify organisations



of interest to us through research or by referral from our networks, and spend time getting to know potential partners before deciding if we will work together. We don't currently make open calls for applications but we often work with other funders who do in order to discover new potential grantees.

All of our grants begin with a conversation to identify how best to support an organisation. Often, our funding will be unrestricted – enabling the grantee to decide how it can best be used, given their other funding and current objectives. If we give funds for a specific purpose, it will have been arrived at through dialogue about the organisation's needs and priorities.

We are keen to learn about the sectors and causes we give to. Although we do not seek unsolicited applications for funding, we are open to listening and learning from organisations whose activities and interests align with ours. Contact details for the Foundation can be found on page 23. ●

“We aim to be a valued and constructive partner”



Fun and friendship at
Family & Community
Development West Lothian

CASE STUDY

Community Enterprise and Isle of Kerrera Development Trust

Exploring new ways of building community assets

THERE'S been a strong drive in recent years to encourage communities to take ownership of local buildings and facilities.

Developing and managing these assets themselves can enable communities to better meet local economic and social needs. Community Empowerment legislation and tailored training and advice programmes have enabled this, with many success stories of community ownership from the Northern Isles to the Scottish Borders.

But acquiring, building or refurbishing such assets is expensive. In the current funding environment, multi-million pound grant packages are increasingly hard to secure. The Scottish Government's Land Fund has been key to many projects, but is oversubscribed and ends in 2021.

"This means that conventional renovation or building projects – in which community organisations commission architect-led teams and commercial contractors to design

"Multi-million pound grant packages are increasingly hard to secure"

and deliver their projects – are at risk of becoming un-fundable," explains Douglas Westwater, CEO of Community Enterprise.

Community Enterprise is a social enterprise development agency which has helped many community groups acquire and operate assets over three decades. Our grant has enabled them to explore how such projects could be achieved at lower cost, making them more feasible and in ways that secure greater community buy-in. They identified four approaches – partnership and collaboration, community DIY, innovative construction, and phased development – and have produced a report including case studies and learning that illustrate the pros and cons of each.

A packed stakeholder meeting to launch their findings in January 2020 confirmed there is considerable interest in these alternative models amongst policy-makers, funders and infrastructure organisations.

Each of the alternative approaches bring their own risks and challenges. To support greater understanding of these and how to mitigate them, the Foundation is now funding

an action learning project to restore the old school on the Isle of Kerrera – a short boat ride from Oban. A Project Manager, overseen by Community Enterprise, will work with the island's development trust to maximise the use of local skills and resources to renovate the building as a community centre. The resultant learning could influence future funding and support in this field, enabling more local organisations to successfully develop and manage their own community facilities. ●



Kerrera residents celebrate the community's purchase of the old school

Funding partnerships

ACROSS all of our giving themes we have developed partnerships with other funders who share our interests.

Working with others in this way accelerates our learning and enables us to benefit from their reach, scale and expertise. It is also efficient – helping our staff team manage a multi-million pound portfolio, and reducing duplication of effort by fund-seeking organisations and grant-holders.

This year, 22% of our funds were distributed through or by other funders.

We are delighted to have worked with the following partners for the first time:



Cattanach Trust
£90,783 is being used to co-fund charities working with families and young children, including the Parent Infant Foundation for the first phase of a planned trailblazer project in Scotland.



Energy Action Scotland
Will distribute £160,000 to organisations improving the wellbeing of vulnerable people at a local level through a Fuel Poverty Challenge Fund.



Highland Society of London
Our £10,000 annual contribution over three years is supporting the cost of administering the Highland Book Prize which is given by the Society and jointly organised with Moniack Mhor Writers' Centre.

In addition, the following partners continued to make or manage grants with our funding:



for piping and drumming tuition



for dementia friendly community projects



to help people self-manage long-term conditions



for youth projects as part of The Listening Fund



for Youth Opportunities projects



for maternal mental health projects



for black and minority ethnic women's projects



to support redevelopment of heritage buildings



for a project re-framing perceptions of the care system

Expenditure

2019

Grant-making

Health & Social Causes	£598,811
Natural & Built Environment	£713,117
Scottish Culture & Heritage	£689,237
Youth Opportunities	£552,528
Employee-led Giving	£297,371
Step Change Awards	£212,607
Other donations	£97,219
TOTAL GRANTS AND DONATIONS	£3,160,890
	(2018: £2,728,305)

Foundation running costs

Staff, travel, office and misc. costs	£176,071
Database and CRM development	£15,290
Giving groups expenses and governance costs	£9,396
Communications	£7,818
Charities Aid Foundation – payroll giving fees & donor services	£15,424
Inspiring Scotland – grant-making services, Step Change	£14,107
Foundation Scotland – grant-making services, Youth Opportunities	£4,500
SUBTOTAL	£242,606
	(2018: £199,839)

TOTAL EXPENDITURE	£3,403,495
	(2018: £2,928,144)

Other donations

These include small grants and the value of William Grant & Sons products and in-kind donations given to support fundraising events. Miscellaneous donations of £2,000 or more are listed below.

The Lens £50,000

This was the fourth year we have supported The Lens and its programme promoting workforce innovation in Scottish charities.

IFB Research Foundation

£5,000

Common Purpose

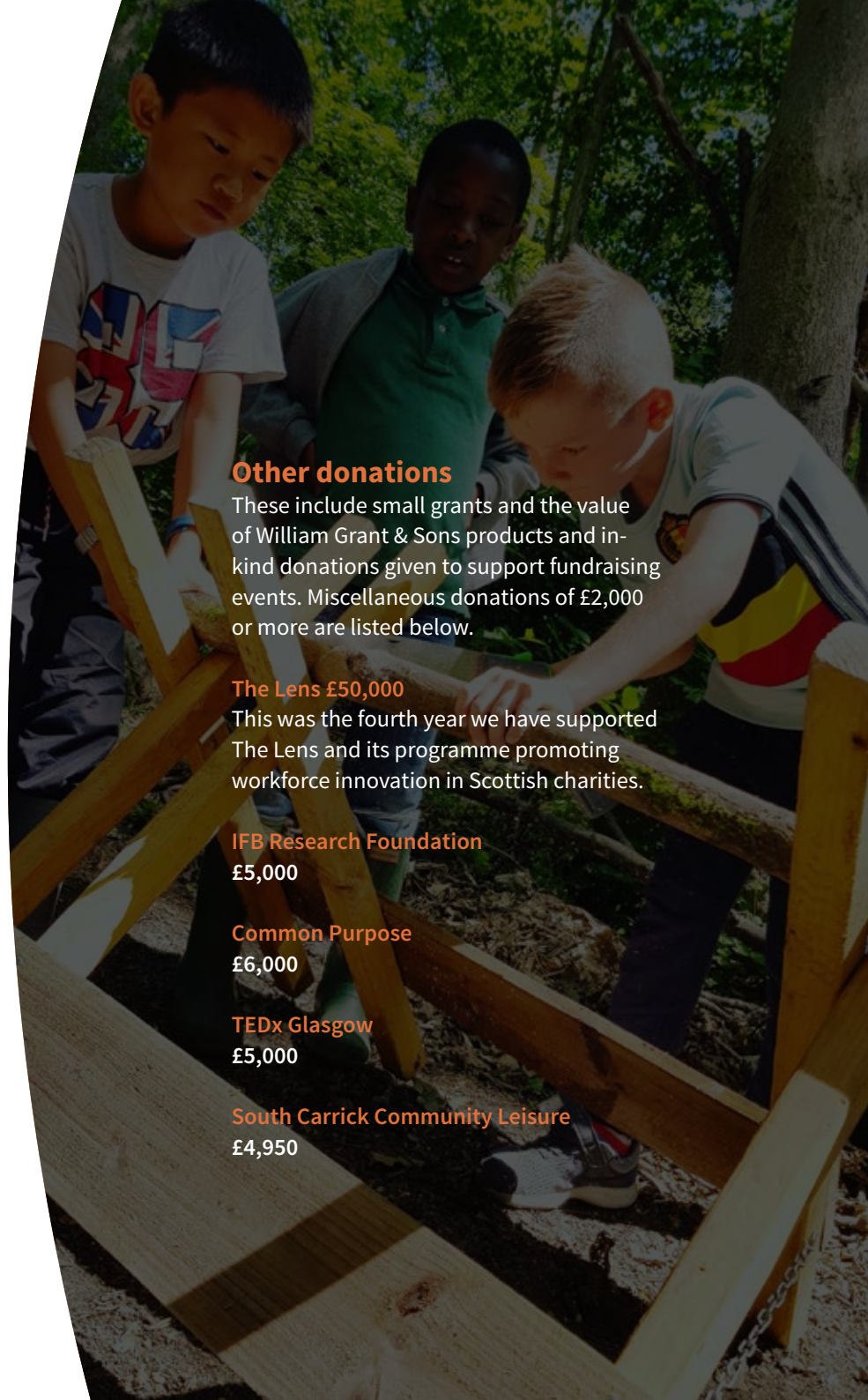
£6,000

TEDx Glasgow

£5,000

South Carrick Community Leisure

£4,950



About the William Grant Foundation

Our vision: A Scotland where everyone has the opportunity to thrive

WILLIAM GRANT & SONS is an independent family-owned distiller headquartered in Scotland and founded by William Grant in 1887.

The company has committed to set aside 1% of pre-tax profits generated each year for donations to charitable causes. The William Grant families established the William Grant Foundation in 2014 as a non-profit association to manage and direct these donations, since when it has donated more than £12 million.

Members of the William Grant families elect a Management Committee which oversees the work of the Foundation. Decisions about grants and donations are delegated to four giving groups. Each group is allocated a share of grant-making funds to support organisations and initiatives in Scotland reflecting a specific theme linked to the Foundation's vision.

The four themes, which have remained unchanged since 2014, are:

- Scottish Culture and Heritage
- Natural and Built Environment
- Health and Social Causes
- Youth Opportunities

The groups' work is facilitated and supported by a small staff team based at William Grant & Sons' Bellshill offices.

A portion of the Foundation's funds is also allocated to support good causes selected by employees of William Grant & Sons around the world.

As a family-owned business, William Grant & Sons has always taken a long-term view to support its people, its communities and its business.

The William Grant Foundation is building on a long history of philanthropy by the company and reflects an enduring commitment to helping Scotland thrive. ●

foundation@wgrant.com
www.williamgrantfoundation.org.uk

“The William Grant Foundation is building on a long history of philanthropy by the company and reflects an enduring commitment to helping Scotland thrive.”



The unique architecture of Maggie's centres – a space away from the stress of cancer

WILLIAM GRANT
FOUNDATION

William Grant Foundation
Phoenix Crescent
Strathclyde Business Park
Bellshill
ML4 3AN

foundation@wgrant.com
www.williamgrantfoundation.org.uk

The William Grant Foundation is a non-profit association which manages and directs charitable donations from William Grant & Sons Ltd. The Foundation is not a registered charity.



INDEPENDENT FAMILY
DISTILLERS SINCE 1867

WILLIAM GRANT
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