

Change takes
trust

Delivery Plan
2025-2028

**The
Robertson
Trust**

At the heart of The Robertson Trust's 2020-30 Strategy is a commitment to reducing and preventing poverty and trauma.

We are dedicated to driving meaningful social change - not just through funding, but by supporting, influencing, and working alongside others to create lasting impact. We believe that real progress comes from going beyond the traditional role of a funder to become a social change organisation in its own right.

Our new three-year delivery plan, **Change Takes Trust**, builds on the foundations of our first plan and sets out how we will turn this vision into reality.

Key to the plan is a commitment to significantly increase our charitable expenditure. Over the **Change Takes Trust** period, we will invest at least £30 million annually, moving up a gear from the £25 million per year pledged in our previous plan, and a clear progression from the £20 million annual average outlined in our 2020 strategy.

The Robertson Trust

Change takes trust



The plan is an evolution, not a departure. It continues the direction set out in our 2020 Strategy while placing even greater focus on:

- **Systems change** – Next set of Programme Awards and developing social movements
- **Prevention** – Building in prevention more consistently into funding decisions, especially Large Grants
- **Empowering communities and working across sectors** – Community Power Funds, starting with Advancing Racial Justice Fund and GLAD (Grassroots Leadership Awards)
- **Growing influence** – Including direct influencing activity
- **Building capacity for social change** – New Funder Plus offers to grant holders, including more demand-led support.

Together, these pillars, supported by a strong organisational foundation around innovating our ways of working, will guide us as we continue our journey to becoming a social change organisation.

Becoming a social change organisation



Develop **systems change** funding



Focus further on **prevention**



Empowering **communities & working across sectors**



Growing Our **influence**



Building **capacity for social change**

Foundation: Innovating our ways of working

Building on progress

Over the last delivery plan, we've made strong progress in laying the groundwork for lasting change.

Through **Programme Awards**, we introduced a new funding stream focused on systems change - an approach that aims for big, lasting change. Within this, we've seen the benefits of co-development with partners and strengthening that capability will be key moving forward.

Awards through Our Funds have supported smaller-scale interventions tackling poverty and trauma at the individual and family level. However, through our 2023 grant holder survey, we have found that a significant number of organisations are attempting to undertake prevention. To unlock this potential, we'll refine priorities and processes to embed prevention more deeply in our funding (alongside continuing to fund work which addresses people's immediate needs) supported by complementary changes to **Funder Plus**.

Building on what we've learned so far, our **Impact and Insights Framework** helps us make sense of data, learn strategically, and use evidence to strengthen our practice and decisions.

We've also taken steps to **empower communities**, bringing lived experience into decision-making, our Advancing Racial Justice Fund, and Grassroots Leadership Award Development (GLAD). We have made important connections and developed our understanding of how we could empower communities of interest and place to work across sectors (public and private as well as third) to create thriving places and populations.

Alongside this, we've begun to explore our **influencing** objective, recognising its potential to drive structural change beyond traditional funding. Early signs are promising, and we recognise there is real potential to strengthen and better resource this area as it continues to develop. We've also started to **build capacity for social change** through events and pilots such as the Plus Fund, introduced cross-cutting themes around Equity, Diversity, Participation and Rights (EDPR) and climate (committing to ACF's Funders Commitment on Climate Change), and taken steps towards embedding trauma-informed practice.

These foundations position us to build on progress and contribute to even greater impact in the next phase.



We recognise the complexity of the world we operate in and are not looking for single answers, or the 'right way'. Instead we will make informed decisions, act and learn, review progress, adjust and act again, in a cycle of continuous improvement and decision-making. We will share our evidence and learning where relevant to support the work of others.



Quote from 2020-30 strategy

Looking ahead

Change Takes Trust builds on what we've learned and focuses our energy on approaches that can have the greatest impact. Over the next 3-year period, we will develop more intentional and collaborative ways of funding - working alongside others to shape programmes that respond to shared priorities and build movements around social goals where progress has felt hardest to achieve.

We'll continue to evolve our grant-making, with a stronger focus on prevention and long-term change. This includes supporting work that addresses the root causes of poverty and trauma, and building in greater flexibility through unrestricted and multi-year funding.

We'll also continue to grow our commitment to community power developing new funding routes that help communities take forward their own ideas and solutions when resources allow.

Beyond funding, we're building up our wider support offer through Funder Plus and by using our spaces in Stirling and Glasgow to connect, collaborate and learn together. We're also developing a programme of social impact investments - supporting initiatives that create both social impact and a financial return that can be reinvested to achieve even more good.

We'll keep learning and adapting as we go, drawing on the insight and experience of those we work with. Transparency will be key - we'll share what we're trying, what we're learning and what's changing along the way.

If you'd like to stay connected as our approach evolves, we encourage you to follow our social channels or sign up to our mailing list to hear more about our learning, new opportunities and future funding offers.



Our Plan - Summary

Our Mission

We are here to prevent and reduce poverty and trauma in Scotland by funding, supporting and influencing solutions to drive social change.

Our Values

We are
Ambitious

We are
Connected

We act with
Integrity

We advance
Equity

Delivered through three objectives

Fund

We will be an open and trusting funder showing ambition and flexibility.

Support

We will stand on common ground with our grantholders, supporting them to build the capacity they need to adapt to the risks and opportunities they face.

Influence

We will enable our partners to organise for the changes we need to see in Scotland, and use our own voice for direct influence where that is the right thing to do.

Embedded through these themes

Work
Pathways

Nurturing
Relationships

Education
Pathways

Financial
Security

Equity, Diversity, Participation and Rights (EDPR)

Our Climate Commitment

Moving further towards becoming a social change organisation



Develop systems
change funding



Focus further on
prevention



Empowering
communities &
working across
sectors



Growing Our
influence



Building capacity
for social change

Foundation: Innovating our ways of working

With progress tracked through 'vital signs' indicators

With impact gauged through the Impact and Insights Framework

Tracking four outcomes for each theme