

OUR VISION

A fair and compassionate Scotland where everyone is valued and able to flourish.

OUR MISSION

We fund, support and champion those seeking solutions to poverty and trauma in Scotland.

at





*“I want everyone to feel special and valued,
and they will see what they can aspire to.”*

ETHEL (BABS) ROBERTSON



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£300+ million

Total funding awarded 1961 to present

£200+ million

commitment for the next decade

Robertson House on Bath Street, Glasgow – the Trust's home and a third sector hub



WELCOME



MARK BATHO
CHAIR

“The Robertson sisters’ legacy and values continue to shape our story and inspire our vision – of a fair and compassionate Scotland where everyone is valued and able to flourish.”

A WARM WELCOME to The Robertson Trust’s story, published to mark 60 years since its founding in 1961.

On the occasion of our 60-year anniversary, we celebrate the compassion and foresight of our founders, the remarkable Robertson sisters. We take the time to reflect on our rich past, and look ahead with ambition at our role in tackling Scotland’s present challenges.

Over the decades, we have grown to become Scotland’s largest independent grant-maker, supporting the country’s vibrant, diverse third sector through changing times. Though the world is a very different place now than it was when the Trust was established, the sisters’ legacy and values continue to shape our story and inspire our vision – of a fair and compassionate Scotland where everyone is valued and able to flourish.

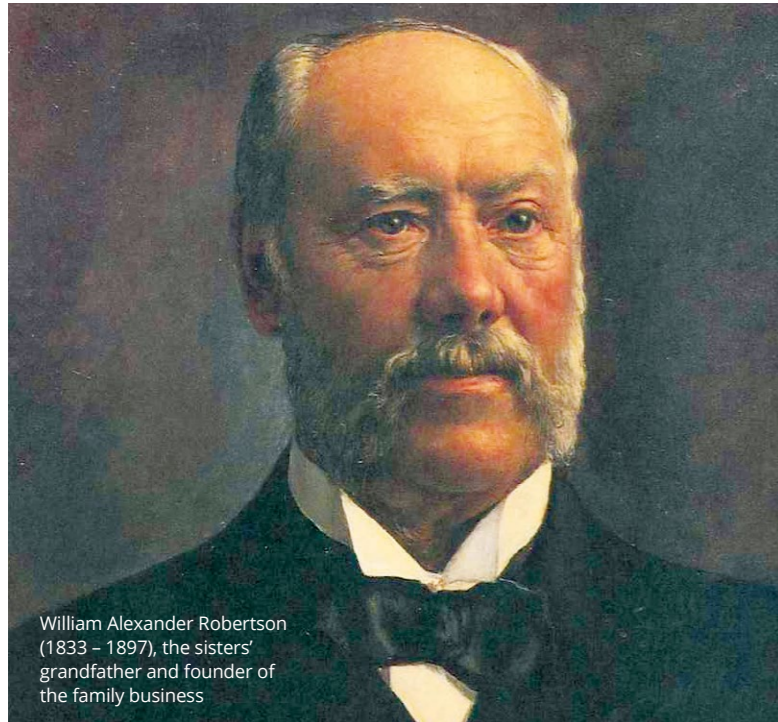
We are proud of our approach, forged since the early days: one of collaboration, mutual support and building connections. We also take this opportunity to celebrate the achievements of our partners across the third sector. Through the decades, we have built lasting relationships with charities large and small – their expertise and experience on the frontline have guided and informed our approach and our priorities.

As a funder, we have always aimed to be ambitious and flexible – responding to the shifting needs of Scotland’s charities and communities, funding innovation and seeking fresh solutions to challenging problems. Learning and insight from our partners have informed our strategic focus for 2020-30: to empower a lasting transformation of the services that help people experiencing poverty and trauma.

It is our privilege say that, since 1961, the Trust has awarded a total of over £300 million to charities across Scotland. In the next decade, we will invest at least £200 million to achieve far-reaching social change.

Now, we look ahead at the future with an aspiration to further strengthen Scotland’s third sector in the decades to come. We believe that a sustainable, thriving third sector means better outcomes and life chances for the people and places in Scotland facing the burdens of poverty and trauma.

Origins: the family whisky business



William Alexander Robertson (1833 – 1897), the sisters' grandfather and founder of the family business

THE Robertson Trust was established on 1st May 1961 by three sisters: Elspeth, Agnes, and Ethel Robertson. But its roots go back a whole century earlier – to the beginnings of a highly successful family enterprise in whisky wholesaling and blending.

In 1861, the sisters' grandfather, William Alexander (W.A.) Robertson, set up as a wine and spirits wholesaler in Glasgow with his business partner, John W. Baxter. Originally from Fife, William had gained experience in the trade before striking out independently.

Pioneers of blending

Robertson & Baxter initially distributed a wide range of wines and spirits – from port, sherry and claret to bourbon and rye whiskey – and then began buying and blending Scotch malt whisky. The company fast became a pioneering player in the industry, and William himself came to be seen as a highly influential figure. Several Robertson & Baxter apprentices also went on to become famous names in the trade: the likes of Alexander Walker of Johnnie Walker & Sons, and John Dewar Junior of John Dewar & Sons.

To gain greater control of blending and secure reliable supplies of malt whisky, William founded two further businesses: Clyde Bonding Company in 1879 and Highland Distillers in 1887. In 1895, in response to the introduction of death duties, Robertson & Baxter became a limited company, with William as 60% shareholder.



He died suddenly in 1897, at the age of 64. His eldest son, James, took over as Chair of Robertson & Baxter, while his second son, Alexander (known as Nander) became director at Highland Distillers. Like his father, James was soon regarded a leading light in the Scotch whisky trade.

Tough times

The turn of the century ushered in a difficult three decades for the whisky industry. The economic boom of the 1890s ended abruptly in 1900, and the growing Temperance movement dampened sales. Then came the First World War, followed by Prohibition in the USA from 1920 to 1933, and steep increases in duty at home.

Despite this turmoil, the Robertson family businesses weathered the storm better than most. Further recognition of Robertson & Baxter's reputation for excellence came in 1936, when the distinguished London wine merchant Berry Bros. & Rudd appointed it to take over the blending of Cutty Sark, its flagship whisky for the American market.

After a brief period of recovery, the outbreak of the Second World War again brought tough times for the industry. Duty was increased, barley was rationed and in 1942 malt whisky distilling ceased. It was also a difficult spell for the family, with the death of both Robertson brothers: Nander in 1940 and James in 1944.

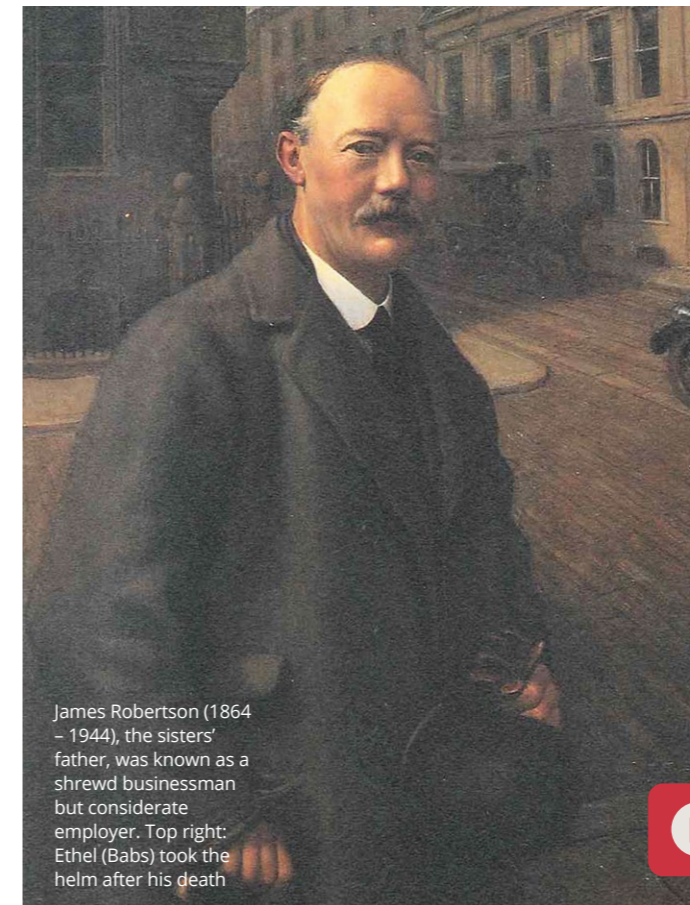
After his death, James' three unmarried daughters inherited his shares in Robertson & Baxter and Clyde Bonding, with the youngest, Ethel (known as Babs), taking on a hands-on role in the day-to-day running of the companies.

“For the sisters – just like their father and grandfather – commercial success was about so much more than profit.”

Post-war prosperity

The post-war years heralded the start of a golden age for the industry and the family business. Local sales bounced back strongly and exports boomed, particularly to the USA, where Cutty Sark (50% owned by Robertson & Baxter) was a leading brand.

The sisters' two decades at the helm of the family business saw a period of prosperity and growth – by the end of the 1950s, Robertson & Baxter's profits had quadrupled. However, for the sisters – just like their father and grandfather – commercial success was about so much more than profit. They had built a thriving yet compassionate business where all employees were treated as family and felt valued.



James Robertson (1864 – 1944), the sisters' father, was known as a shrewd businessman but considerate employer. Top right: Ethel (Babs) took the helm after his death



Highland Distillers, founded by the family, acquired the Orkney distillery Highland Park in 1937

[Check out the short film of our story here](#)

Family values in business and life

Three generations of the Robertson family lived by strong values of integrity, compassion and humility, both in business and life – threads that run all through the history of the Trust.

Founder William Robertson was an astute and influential entrepreneur, but also operated with honesty and lived by the philosophy of taking “the long view”, as he put it – planning for the future rather than being tempted by quick profit. He was also known for his “generous and unostentatious support of philanthropic works”.

His son James, the sisters' father, was equally known for being “far-sighted and shrewd, but also considerate and courteous: he habitually took the time to enquire of and show concern for [all] his employees”.

When James's daughter Ethel took the helm, she too cared deeply for the welfare of company staff, and with her sisters continued the family tradition of philanthropy with humility. It was this ethos that laid the foundation for establishing The Robertson Trust.

Note: quotes taken from the book The Robertson Trust by Charles Maclean, 2001

The remarkable Robertson Sisters

Elspeth, Agnes, and Ethel inherited Scotland's leading whisky empire when their father James, the second generation in the business, died in 1944.

The sisters agreed that the youngest, Ethel – known by her childhood nickname Babs – would play a hands-on role in running the companies. She was 41 at the time and had no previous commercial experience, but enthusiastically took on her father's mantle as managing director of Robertson & Baxter and Clyde Bonding, supported by the other directors.

Evidently, Babs was a remarkable woman: intelligent, energetic and brimming with common sense. She had been brought up with strong family values and was devoted to the welfare of employees. Hardworking and savvy, she ably led the businesses.

The post-war boom saw the fortunes of the business soar. Big North American distillers envied this success and were keen to muscle in. As early as 1947, Babs received a buy-out offer from

“Babs was a remarkable woman: intelligent, energetic and brimming with common sense.”

Sam Bronfman, the redoubtable president of Canada's Seagram Corporation. She turned him down without hesitation, and subsequent hostile bids were narrowly fought off.

These events made the sisters realise just how ruthless some American businesses could be, and that a hostile take-over could have serious consequences for the employees they cared for so deeply. They were also well aware that retirement loomed – in 1960 Babs was 57, Agnes 63 and Elspeth 64 – and that death duties would claim 80% of their estate. This meant the companies would have to be sold to meet such duties – again, with potential consequences for the staff.

In search of a way to safeguard the family legacy and the future of their staff, the sisters consulted a leading tax counsel. His recommendation was to set up twin vehicles: a holding company and a charitable trust. The sisters' business assets would be transferred to a new holding company, and the shares received in return would be gifted to a new charitable trust, to be called The Robertson Trust.

In this way, the sisters could protect their businesses and their family of employees from hostile take-over, while also creating a charity to improve the lives of Scotland's people, in line with their family values.



“In this way, the sisters could protect their businesses and their family of employees, while also creating a charity to improve the lives of Scotland's people, in line with their family values.”

Agnes, Elspeth and Babs Robertson taking tea at Cawderstones, their Berwickshire home

Childhood and home life

The three sisters were born in Ayrshire: Janet Elspeth in 1896; Agnes Heatley in 1897 and Ethel Greig (known as Babs) in 1902.

Their childhood, though privileged, was also marked by loss: their mother Agnes (née Greig) died shortly after Ethel's birth and their brother, William Alexander, succumbed to flu in 1919, aged just 19. The family had moved to Edinburgh in 1910 and the sisters were raised by their no-nonsense housekeeper, Mrs Shoreditch, who lived with them until 1954 (and apparently twice opposed Ethel's engagements!). But by all accounts, the sisters' childhood was happy and sociable.

Their father James was a passionate outdoorsman. His daughters accompanied him on outdoor pursuits around Scotland and for holidays at the family's Highland bolthole, Kintail Lodge in Glenshiel. Here they enjoyed walking and sailing on Loch Duich, and nurtured a love of horses and dogs – animals and the outdoors remained lifelong passions.

Soon after their father's death, the trio moved to Cawderstones, a house near Berwick-upon-Tweed they'd bought between them. They also acquired

two neighbouring farms – Edrington Mains and Edrington Castle – and lived simply and quietly, though the house was remembered as being convivial, filled with flowers, music and humour.

All who knew the sisters recalled their modesty, gracious manner and charisma. They were said to be generous and considerate toward their household staff and farm workers, and this was repaid with loyalty and genuine affection.



The sisters with their housekeeper, Mrs Shoreditch, and beloved pets

A spirit of generosity

Like their father and grandfather, the sisters shared a genuine interest in the wellbeing of people and communities around them. Robertson & Baxter was very much a family company and the sisters viewed its staff as extended family.

Babs made an effort to get to know every employee personally and helped them where she could. A couple of days a week she would

“I want everyone to feel special and valued, and they will see what they can aspire to.” Babs Robertson

travel from home in rural Berwickshire to the company offices in Glasgow, and spend some time there chatting to staff and asking about their families.

The sisters encouraged employees to develop their personal aspirations. Believing that people felt good when they looked good, Babs insisted on formal wear and taxi transport at the annual dinner dance, but she also made sure that formal wear hire and taxis were paid for by the company.



Elspeth

Modest, soft-spoken and generous, she ran the household and was the best known sister among local people. She was active in the community and sat on Berwickshire County Council for 30 years. Elspeth often helped neighbours in need and made generous anonymous donations to local causes. She was the driving force behind building a new school at nearby Foulden and paid for many facilities herself. Apparently she loved to wear an old fluffy hat bought at a church sale!



Agnes

The sporty one, she fenced for Scotland and was an enthusiastic golfer and horse rider. Agnes ran the farms, cared for the sisters' numerous dogs and cats and established a successful racing stable. Known to be able to turn her hand at anything, she was also a talented artist, painting in oils and producing the illustrations for the sisters' humorous annual Christmas cards, which often featured their pets.



Ethel (Babs)

The youngest sister was stylish and gracious, but with a core of steel. Former Trust Chairman John Macphail recalled that when she felt very strongly about something, Babs would subconsciously make a chopping gesture with her hand – as if to say 'there is no point in continuing to argue'. A confident driver with a fondness for Aston Martins, she'd drive from the sisters' Berwickshire home to the company offices in Glasgow every week to catch up with staff.

Founding and early days

On 1 May 1961, Elspeth, Agnes and Babs Robertson signed the deed of trust which transferred their business assets to a new independent holding company – named Edrington after their Berwickshire farms – and gifted their shares in the new company to a new charitable trust, called The Robertson Trust.

This arrangement had two aims: to protect the family businesses from hostile take-over by foreign rivals – and the negative impact that might have on the staff they cared for – and secondly, to continue and grow the financial support the sisters had given to a large number of charities. Joining them as founding Trustees of the new Trust were their solicitor, accountant and representatives from the companies.

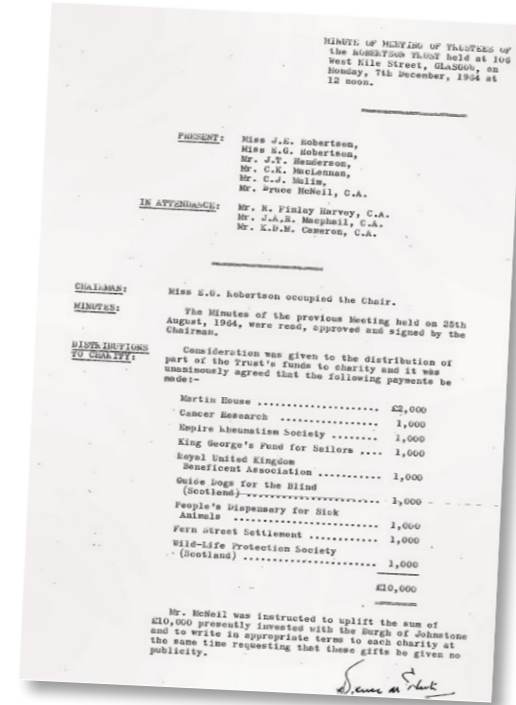
Underpinning the new charitable trust were family values close to the sisters' hearts: honesty, integrity and a willingness to help others. The Trustees had broad powers to select which causes they would support, though the sisters insisted that they held true to the core principle of improving the lives of people in Scotland and "helping to make a difference" to the charities they supported.

Early funding priorities

The sisters enthusiastically guided the Trustees' meetings. Four main priorities for donations quickly emerged, mostly reflecting interests and concerns close to their own hearts: animal welfare, medical research and facilities, children and young people, and welfare of elderly and disabled people.

After a period of settling in, the first 'distributions to charity' totalling £10,000 were awarded at the Trustees' meeting on 7 December 1964. Typical of the sisters' humility, early donations from the Trust were made anonymously.

“Underpinning the new charitable trust were family values close to the sisters' hearts: honesty, integrity and a willingness to help others.”



Extract from the Trustees' meeting in 1964 showing details of the first donations

All creatures great and small

The sisters were great animal lovers. They were passionate about the welfare of the livestock and horses on their Berwickshire farms, and had many house pets. Their menagerie often featured on the humorous Christmas cards illustrated by Agnes (below).

Nearly a third of the first disbursement went to animal welfare. Early beneficiary charities included Guide Dogs For The Blind, Scottish Wildlife Trust and People's Dispensary For Sick Animals. Later on, substantial funding went to centres of veterinary excellence, such as the University of Glasgow's Weipers Centre and the Small Animal Hospital at the Royal Dick Vet School in Edinburgh.



Growing old with dignity

A cause close to Elspeth's heart was care for older people. From the early days into the 21st century, it remained a focus for the Trust.

In 1972, Elspeth bought Mordington Clappers, a tiny hamlet near the sisters' home in Berwickshire which the local council had earmarked for demolition. She gifted it to the Trust three years later to provide homes for elderly people, including some of the sisters' retired farm workers. The Trust refurbished the homes and in 1975 set up a separate entity, The Clappers Trust, to administer the project.

Over the decades, the Trust has supported a huge range of charities that care for older people: from national organisations such as Erskine, Age Scotland and Contact the Elderly to smaller regional, local and community-based initiatives and facilities.



Down the decades

In the decades since its creation, The Robertson Trust has always remained true to the sisters' family values and vision. However, its funding priorities have evolved to reflect changing times.

Since its early days, the Trust has responded with agility and flexibility to the shifting needs of Scotland's people and communities, and the constellation of charities that support them. And in latter decades, it has worked proactively to research, encourage and develop fresh approaches to more complex problems.

At the same time, the organisation itself – and its staff, skills, networks and expertise – have grown and expanded, underpinned by Edrington's healthy growth. Now, let's take a whistle-stop tour down the decades and explore what's changed... and what's remained constant.

“Flexibility and the agility to adapt to changing circumstances has remained fundamental to the way the Trust operates.”

For six decades, Scotland's people – of all ages, backgrounds and abilities – have benefited from initiatives and projects funded by The Robertson Trust

£300+ million

Total funding awarded 1961 to present

THE 1960s

The Trust's earliest funding priorities reflected the sisters' own interests: animal welfare, medical research and facilities, children and young people, and care of older and disabled people.

Throughout the 1960s, Edrington enjoyed strong financial performance, which meant ever-increasing funds for disbursement. Towards the end of the decade, the Trustees agreed additional priorities: the founding of a Chair of Economics; research into alcoholism; multiple sclerosis research; the provision of operating theatres and funding lifeboats on Scotland's coasts.

Already in this first decade, a tendency emerged toward being flexible and adaptable: the sisters and their fellow Trustees felt that the agreed long-term objectives should not rule out the ability to make ad hoc donations to meet other needs as they arose. This key strength – flexibility and the agility to adapt to changing circumstances – has remained fundamental to the way the Trust operates.

£ 1960s total funding £166,000

THE 1970s

By the early 1970s, with the Trust's income growing thanks to Edrington's continued success, awards were divided into 'short-term' and 'long-term'. In recognition of the fact that the family fortunes were built on alcohol, research into alcoholism became a focus: from its creation in 1969 into the early 2000s, the Trust supported the Medical Council on Alcoholism (MCA) and its Lecture Trust.

Existing priorities of medical research, lifeboats, animal welfare, children and young people were also joined by community initiatives and the arts. The Trust often viewed its support as 'pump priming' – providing a catalyst for charities to obtain additional funding and support from elsewhere, instead of becoming reliant on it.

£ 1970s total funding
£1 million



The Peterhead lifeboat *Misses Robertson of Kintail* launched in 2006. Left: *The Three Sisters* was the first lifeboat funded by the Trust



MAIN IMAGE: NICHOLAS LEACH; INSET: WWW.AMBALIE.ORG.UK

Saving lives at sea

The sisters first named lifeboat provision as a priority in 1967. The RNLI was one of the first charities to receive a sizeable award from the Trust: £73,000 to fund a new lifeboat for Thurso. Named *The Three Sisters* (though the benefactors remained anonymous), it launched in 1971. With typical modesty, one of the sisters attended the ceremony anonymously.

In 1986, a new lifeboat for Peterhead, *The Babs and Agnes Robertson*, was launched (naming the funder this time), and in 2006 it was replaced with the state-of-the-art Tamar class *Misses Robertson of Kintail*, funded by the Trust to the tune of £2 million. A three-year donation for the training of Peterhead's lifeboat crew followed in 2011-14.

THE 1980s

The decade began with a deep and enduring recession. Despite tough economic times, the Trust's income kept growing throughout the '80s as Edrington continued to prosper. With more funds available for disbursement, the 'big ticket' funding of medical research facilities – begun in the previous decade – could be expanded.

The late '80s saw the first of many large donations towards excellence in biomedicine at Scottish universities, which continued into the 2000s: £1 million towards construction of new facilities for the Institute of Biotechnology at Glasgow University, named The Robertson Building, and the start of a longstanding relationship with biomedicine at Strathclyde University.

The decade also marked the end of an era, with the deaths of all three sisters: Agnes in 1980, Babs in 1985 and Elspeth in 1989.

£ 1980s total funding
£3 million



The Trust first supported life sciences at the University of Glasgow in 1988, and later helped to fund the Wolfson Medical School building, which opened in 2002

PHOTOGRAPHIC UNIT, UNIVERSITY OF GLASGOW

THE 1990s

This was a decade of growth and change. Thanks to Edrington's continued strong performance and expansion, the number of beneficiaries grew, as did the size of the donations made.

In 1993, Sir Lachlan Maclean of Duart was appointed the Trust's first dedicated Secretary to oversee its expanding work. In the mid-1990s regular funding categories were refined to: Alcohol Misuse; Animals; Art; Care; Community Services; Disability, Drugs; Education; Environment; Heritage & Conservation; Medical; Sport.

Significant awards to Scottish universities continued, totalling £6.6 million in the '90s. And the focus on nurturing excellence in higher education widened to include individuals: in 1992, the offshoot Robertson Scholarship Trust was formed to provide scholarships and

“The Trust supported excellence. It recognised that small things can grow into larger things, attracting others to join in over time – the beehive approach.”

Sir Lachlan Maclean



Dundee Rep was among the performing arts partnerships forged in the 1990s

bursaries for promising students (see page 28 for more).

As well as academic scholarships, the Trust supported emerging elite talent in sport through Scottish Sports Aid, and in the

performing arts through partnerships with Scottish Opera, Citizens Theatre Glasgow and Dundee Rep among others. The provision of playing fields and sports for facilities for young people was also added to the areas of support.

1990s total funding
£31 million

THE 2000s

The new millennium again brought growth and evolution for the Trust: its income increased significantly, the first dedicated staff came on board and its first website went live. A strategic review also brought new focus, identifying four priority areas that reflected an assessment of greatest social need in Scotland: Health; Social Care; Education and Training; Community Arts and Sports.

In addition, the Trust began a more proactive approach to understanding complex social challenges where its support

could make an impact. Its new Development ethos saw it begin to research and explore solutions to seemingly intractable problems – such as rural homelessness, criminal reoffending, drugs and alcohol misuse – with evaluations shared with the Scottish Government and third sector partners to help improve policy and practice.

2000s total funding
£75.9 million



Social Care, such as support for carers in the community, was identified as a priority area in the 2000s



Macphail recipient Angus Fraser chasing the ball

Excellence in rugby

The focus on nurturing Scottish sporting talent saw the creation, in 2005, of the Macphail Rugby Scholarship in memory of John Macphail, the former Chief Executive of Edrington and Chairman of the Trust who had won two caps for Scotland (in 1949 and 1951). The Scholarship has funded specialist training abroad for promising young players, with the view to a Scottish cap. Well-known names among the 40 or so alumni include John Barclay (the first); Roddy Grant; Grant Gilchrist; Jonny Gray and Finn Russell.



THE 2010s

The 2009 financial crisis cast a long shadow over a decade of austerity that followed, with public funding of frontline services being squeezed in real terms and charities facing financial uncertainty – a situation that continues to this day.

The decade saw widening inequalities and more complex needs among the most disadvantaged people. The Trust's Development work to build partnerships, grow evidence and inform policy on complex issues such as drugs, alcohol misuse and reoffending gained momentum.

Early in the economic downturn, the strategy for the decade focused on being a

flexible funder that built close, supportive relationships with smaller and medium-sized charities – 'the fabric of Scotland'. Bricks-and-mortar support for smaller charities came in 2013 with the opening of Robertson House in Glasgow – a new home for the Trust and a charity hub offering space for small third sector organisations.

Another boost came in 2017 with the announcement of a new project to develop a third sector charity hub and conference venue in Stirling. The Barracks opened its doors in late 2019.

2010s total funding
£168.5 million



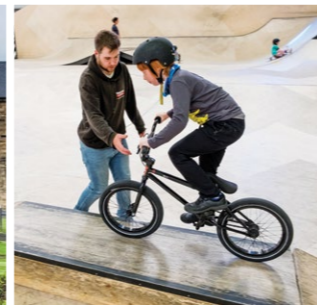
2020 – a pivotal year

With the turn of the decade came a whole new chapter of upheaval and uncertainty – globally, for Scotland and for its third sector – as the Covid-19 pandemic took hold. In the midst of the first wave, Board members and staff were considering the future direction of the Trust with a major strategic review.

Its new strategy for 2020-30 was published in the autumn of 2020, sharpening the Trust's focus on two complex, interlinked social issues affecting Scotland's communities – poverty and trauma.

2020s total funding commitment
£200+ million

Projects and initiatives large and small supported in the 2010s, from left to right: Business in the Community; Paragon; The Barracks in Stirling; Youth Work in Sport; MCR Pathways; Garnethill Parents Association



Check out the short film of our story [here](#)

Find out more about the strategy for 2020-2030 on our website [here](#)



ANGELA CATTIN



Through our Funds and new initiatives like Partners in Change, we work with grassroots groups and diverse charities to achieve shared goals

Our place today

Today, the Robertson Trust's vision and values remain true to the three sisters' legacy of compassion, kindness and aspiration for all, though the world is a very different place today than it was in the early 1960s.

In Scotland and around the globe, people's daily lives have been changing rapidly these last few years. Ongoing economic upheaval, technology, shifting work patterns and climate change have all brought greater uncertainty and inequality.

The Covid-19 pandemic in 2020-21 deepened this inequality, and has had a far-reaching impact on people and communities – including greater financial insecurity, social isolation and poor mental health and wellbeing. Evidence suggests that people who were already living with economic hardship or previous trauma are most likely to bear the brunt of present challenges.

A sharpened focus on poverty and trauma

In the second decade of the 2000s, the Trust undertook a major strategic review with extensive input from many quarters, including long-term funding partnerships. From their experience, it was clear that some of the most intractable social problems facing Scotland's people and communities are often rooted in a complex interplay between two damaging life experiences: poverty and trauma. >>



The Trust's current strategic focus on poverty and trauma is informed by its research with partners, such as that captured in the 2019 report *Hard Edges Scotland*



TEN-YEAR FUNDING COMMITMENT:

£20 million a year

£200+ million in total

Our vision, rooted in our heritage:

A fair and compassionate Scotland where everyone is valued and able to flourish.

Our mission:

We fund, support and champion those seeking solutions to poverty and trauma in Scotland.

“As a flexible and ambitious funding partner, we are supporting the third sector to re-imagine and transform services for people living with poverty and trauma.”

The Trust's ten-year strategy for 2020-30, published in September 2020, has sharpened its focus on these interlinked issues of poverty and trauma. It builds on previous strategy insights and experiences gained over six decades, and on strong relationships with others across the third, public and private sectors. The Trust will identify how best to fund, support and influence solutions on education and work pathways, financial security and emotional wellbeing and relationships.

A catalyst for social change

Knowing that these are complex and deep-rooted social challenges, the ambition we have set ourselves for the next ten years is to be a catalyst for far-reaching social change. As a flexible and ambitious funding partner, we are supporting the third sector to not only help meet immediate need, but to re-imagine and transform systems and services with and for people living with (or at risk of) poverty and trauma. Through our Funds and new initiatives like Partners in Change, we will work with grassroots groups and diverse charities to achieve shared goals.



View the short film 'Tackling Poverty and Trauma: Our 2020-30 Focus' [here](#)



ANGELA CATLIN

Among the first Partners in Change is Scottish Refugee Council, whose Family Rights Service supports parents and children at every step in their asylum journey



Poverty in numbers

19%

of Scotland's population – just over 1 MILLION people of all ages – living in relative poverty after housing costs

24%

of children – 240,000 – living in relative poverty after housing costs

Figures are for 2017-2020 as reported at <https://data.gov.scot/poverty/#Poverty>



View the short film 'Catalyst for Change: Our Way of Working' [here](#)



Find out more about the strategy for 2020-2030 on our website [here](#)

Transforming support for families in Tayside



SallyAnn Kelly, Chief Executive of Aberlour Child Care Trust, on the charity's new project funded through Partners in Change.

*“*During the pandemic, the number of families in need increased dramatically. Many told us they found it very difficult to access support and navigate the benefits system.

Our new Tayside Family Financial Wellbeing Project, funded by The Robertson Trust, is ambitious and two-pronged: firstly, it offers immediate financial and practical support to families who are living in poverty. But it will also look at improving the existing services that are meant to support families. We'll be working



with local authorities and partners to simplify access to what can feel like very bureaucratic systems.

Partners in Change provides us with the opportunity to test our assumptions about how we can improve things for and with families. If we get it right here in Tayside, there is a huge opportunity to roll out that learning across Scotland.

Collaboration is critical. It's important that we work alongside a funder that is flexible and innovative, and that shares our ambition: not just trying to help lift people out of poverty but allow them to live a life in which they thrive.”

The Robertson Trust Scholarship



The Robertson Trust's in-house Scholarship scheme also reflects the sisters' family values, giving promising young people the chance to see what they can aspire to and fulfil their full potential.

To date, the Scholarship has supported thousands of undergraduates in Scotland who may have the talent and ambition to pursue higher education, but lack the financial resources or support network to do so.

The Scholarship is so much more than a bursary scheme. Along with financial assistance, it offers a comprehensive self-development programme called Journey to Success, which provides training, mentorship, peer support and work internship opportunities. Journey to Success is designed to help young people overcome financial and social barriers to gaining the university education they deserve and the career they aspire to.

Origins

Today's Journey to Success programme grew from the Robertson Scholarship Trust, a sister charity to The Robertson Trust formed in 1992. Initially, this Trust assisted young students with exceptional potential to pursue their studies at well-known centres of excellence throughout the world.

In 1995, a pilot scheme was created to award bursaries to young people from Glasgow schools with the ability, but not necessarily the financial means, to attend university. The pilot scheme was such a success that it was extended to other parts of the country, and in 2016 the Robertson Scholarship Trust was wound up and its work absorbed into the main Trust.

Over the years, Journey to Success has built strong partnerships with Scottish universities, as well as employers in the public, private and third sectors to boost Scholars' employability through work internships. There are more than 700



“Journey to Success is designed to help young people overcome financial and social barriers to gaining the university education they deserve and the career they aspire to.”

A group of enthusiastic Robertson Scholars enjoying the peer-to-peer support the Journey to Success programme offers. Facing page: Scholarship Ambassador Jemma speaks at a meeting

Scholars at the time of publication, with around 150 new places available each year.

Closing the poverty-related attainment gap

For many promising young people, barriers to fulfilling their potential might already feel insurmountable at late primary and early secondary age.

Recognising that early support at school gives them the best possible chance of going on to further or higher education, the Trust's Widening Access programme, begun in 2015, has been supporting mentoring initiatives in schools and colleges around the country. This includes a school-based programme called MCR Pathways; First Chances Fife in partnership with University of St Andrews and Fife College, and mentoring programmes at Borders College and Forth Valley College.

Over the next ten years, The Trust wants to address the poverty-related attainment gap in Scotland, being clear on what needs



A group of Fife school pupils graduating from the First Chances Fife programme with Fife College and University of St Andrews

DAVID WARDLE

to change, and where we as an independent funder can add value. Guided by the Trust's long-term strategic focus, this work continues to look at innovative ways of

closing the attainment gap, so that every child has the best chance to fulfil their potential, whatever their background or circumstances.



Vijay Chand

Robertson Scholar Vijay is studying Physics with a Year Abroad at the University of Edinburgh.

“When I applied to university, I realised that I would run into financial hardship. Thankfully, I managed to get the Robertson Trust Scholarship.

As part of my course, I'll spend a year abroad working at the TRIUMF particle accelerator centre in Vancouver. Without The Robertson Trust's support, guidance and encouragement – pushing me to aim for my potential – I wouldn't have had the confidence to think I could go abroad.

The Journey to Success programme has really changed my life. Some of the best people I've met have been through the programme. The workshops have helped me gain awareness about employment after you graduate, and have helped me develop a lot of the skills I will need to be successful. It's really changed my perspective on the kind of expectations I had about myself, and it's opened a lot of doors for me.”



Monica McDougall

Former Robertson Scholar Monica did an internship with children's charity PEEK (Possibilities for Each and Every Kid) and now works as their Communications and Engagement Officer.

“Doing the internship in my third year at university prepared me for working life. It made graduating easier because I was already in the workplace environment. The internship was a really good stepping stone to make that transition from university to real-life working. I don't think I would be working at PEEK if it wasn't for the Trust.”



Check out our short film about Journey to Success [here](#)



Find out more about the Journey to Success and read more Scholars' stories on our website [here](#)

The Robertson Trust A brief history

The family business

1858

William Alexander (W.A.) Robertson starts his wholesale wine and spirits enterprise

- **1860s** Robertson & Baxter fast becomes a pioneers of quality whisky blending
- **1879** W.A. Robertson founds Clyde Bonding Company
- **1880s-1890s** Boom years for the whisky trade
- **1887** Highland Distilleries formed
- **1897** W.A. Robertson dies, his eldest son James takes over as Chair
- **Early 1900s** Start of difficult decades for the Scotch whisky industry
- **1933** Prohibition in the USA ends; the industry starts to recover
- **1944** James Robertson dies; his daughters inherit the business
- **1947** Ethel refuses to sell the family business to rivals
- **Late 1950s** Whisky market booms as remaining wartime restrictions are lifted

The Robertson Trust

1961

1 May: The sisters establish The Robertson Trust; family business assets transferred to the new holding company Edrington

- **Dec 1964** First donations totalling £10,000 awarded
- **End 1960s** £166,000 awarded in the course of the 1960s
- **1975** The Clappers Trust formed to run Mordington Clappers houses
- **End 1970s** £1million awarded in the course of the 1970s
- **Nov 1980** Agnes dies
- **Dec 1985** Ethel dies
- **Oct 1989** Elspeth dies
- **End 1980s** £3 million awarded in the course of the 1980s
- **1980s-1990s** Edrington's financial success means a dramatic increase in available funds
- **1992** The Robertson Scholarship Trust established
- **Nov 1993** Sir Lachlan Maclean of Duart appointed as Trust's first Secretary

- **1995** Pilot Scholarship scheme for disadvantaged young people launched
- **End 1990s** £31 million awarded in the course of the 1990s
- **2000** Sir Ian Good appointed as Chair; strategic review
- **2005** Macphail Rugby Scholarship created in memory of John Macphail, previous Chair
- **2006** Duncan Munro appointed as Director
- **End 2000s** £75.9 million awarded in the course of the 2000s
- **By 2010** More than £110 million awarded since founding
- **2011** Trust celebrates its 50th anniversary

- **2011** Kenneth Ferguson succeeds Duncan Munro as Director
- **2012** David Stevenson CBE succeeds Sir Ian Good as Chair
- **2013** Opening of Robertson House, the Trust's new home and a charity hub
- **2014** Journey to Success programme created following a Scholarship strategy review
- **2015** Dame Barbara Kelly succeeds David Stevenson CBE as Chair
- **2015-16** Five-year strategy review
- **2016** 1,000th Scholar accepted
- **Aug 2016** New Giving Strategy and reorganisation; The Scholarship Trust is wound up
- **2017** Barracks Stirling charity hub project started

- **2017** Shonaig Macpherson CBE succeeds Dame Barbara Kelly as Chair
- **2019** Barracks Stirling opens its doors as a charity hub and conference venue
- **End 2010s** £168.5 million awarded in the course of the 2010s
- **Sept 2020** New ten-year strategy launched with sharpened focus on poverty and trauma
- **Oct 2020** Jim McCormick joins as Chief Executive Officer
- **2021** New senior roles created to support ten-year strategy
- **Oct 2021** Mark Batho succeeds Shonaig Macpherson CBE as Chair

Looking to the future

The Robertson Trust was founded on three principles close to the hearts of Elspeth, Agnes and Babs Robertson: honesty, integrity and a willingness to help others. Today, our values as an organisation reflect this legacy while responding to modern challenges.

Looking back on 60 years of the Trust's existence, we can take pride in the impact and achievements our funding has enabled over the decades, and how those have embodied the sisters' founding principles.

Now is also the time to look ahead. Like its founders, the organisation takes a long-term view: The Robertson Trust, we believe, has a pivotal part to play in helping to tackle some of the most complex social problems faced by Scotland's people and places in the 21st century.

Over the course of this decade, we aim to empower charities and those they serve to build innovative, sustainable solutions to poverty and trauma.

Now and in the decades to come, we will continue to utilise our substantial financial resources – thanks to the global success of Edrington – along with the talent and commitment of our staff and Board members, and the relationships of trust we have with partners, to drive real and meaningful change.

We look ahead at the future with a clear view of the changes we want to see in Scotland, and the ambition to further strengthen and advocate for charities, people and places where we meet on common ground. We believe that a sustainable, thriving third sector is essential for tackling the challenges ahead and generating better outcomes and life chances for those who face the burdens of poverty and trauma.

“Over the course of this decade, we aim to empower charities and those they serve to build innovative, sustainable solutions to poverty and trauma.”

Our values today



We act with **Integrity** We are **Ambitious** We **Connect**



Check out the short film of our story [here](#)



Find out more about the strategy for 2020-2030 on our website [here](#)



Glasgow-based charity PEEK (Possibilities for Each and Every Kid), supported by The Robertson Trust, works to improve the life chances of children from all backgrounds

