

The Robertson Trust Strategy 2020-2030



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Section 1

Welcome and introduction

Since our creation almost 60 years ago, The Robertson Trust has remained true to the founding principles of the Robertson sisters: providing support to organisations to enable them to deliver vital services and resources to communities and individuals in need across Scotland.

Although we are proud of our achievements to date, we recognise that the world around us is changing at an unprecedented pace and we need to consider our future role in it. Even before the Covid-19 global health crisis, technological advances, changes to working patterns, and climate change had already brought about fundamental shifts in how we live our day to day lives and will continue to do so over the coming decades. As with Covid-19, it is very likely that these changes will impact most on those who are already facing financial hardship.

Over the ten-year period of this strategy, we want to build on our rich heritage, experience and knowledge as a funder, while recognising that we are operating in a changing world that requires a different approach to tackling the complex problems that face society today. With our vision of a fair and compassionate Scotland where everyone is valued and able to flourish, we will focus our resources on two of the most significant challenges faced by communities across Scotland today: poverty and trauma.

We will take stock of the wealth of knowledge and expertise that already exists on the causes and consequences of poverty and trauma in order to transform support systems, services and the way we address them. This is an evolution of the work we have

undertaken previously but will sharpen our focus around poverty and trauma, supporting communities and the organisations working with them to affect lasting change.

We recognise that The Robertson Trust is not the authority on issues of poverty, nor trauma, nor communities. However, we see ourselves as advocates and champions for those who are. We want to use our position and experience as one of the largest independent funders in Scotland to support and enable communities and third sector organisations to do what they do best – helping people and communities experiencing poverty or trauma, or both, to thrive. In particular we will further support their work through research, development of policy and practice solutions, influencing, and advocacy.

As part of the development of this strategy we spoke to a wide range of stakeholders to learn more about the challenges they are facing and the kind of support they want from us. We heard about the complex challenges communities are facing. Organisations told us that they valued our role as a funder, and encouraged us to be clearer about our aims and to recognise that our position means that we have an opportunity to speak up, challenge and connect in a way that others might not be able to.

We have long been advocates for the role of communities and the organisations supporting them, in building solutions to their own challenges. The global health crisis has demonstrated clearly the role that communities, and the third sector organisations working with them, have in addressing need, building on assets and making change happen. They have stepped in and responded nimbly and ably, often reaching places that statutory services could not to address the needs presenting themselves: food security, incomes falling, costs rising, digital exclusion and severe pressures on mental health. But the crisis has also highlighted the huge strain that these communities and organisations were already under and the need they have for better resources and support.

To achieve our vision, we must address long-established risks, anticipate new ones and work intelligently. The scale and complexity of the challenges presented by poverty and trauma, and the wider changes our world is facing, are far too big for any one of us to address on our own. We will work across sectors, but with a particular focus on the third sector, to support communities experiencing poverty or trauma. We want to be a funder that meets and anticipates the needs of organisations and communities working to address the impacts of poverty and trauma and support them to build, collaborate and develop effective solutions to the problems they face.

Our role is to fund, to support and to inform, and we will do this by championing organisations and communities finding solutions to poverty and trauma, bringing together a diverse coalition of sectors, organisations and communities to realise our common goals.

This strategy is the product of collaboration, consultation and listening to the needs of people through the third sector, and places us in a privileged position of driving change. We remain as committed as ever to working with and for communities, now and in years to come and supporting them to co-design and share solutions that work. The strategy reflects this commitment, in the new, post-Covid-19 world, and aims to support its transition in the short-term by being responsive and adaptable and helping communities to flourish in the long-term.

We will continue to invest in communities through our grants programme. We will also continue our commitment to supporting young people from disadvantaged backgrounds, ensuring we widen access and routes to university through our scholarship programme, the only area of our work where we are currently responsible for directly delivering services and support to individuals. However, we want to use this time to build our own understanding around our areas of interest, and to help us identify where we can most effectively make a difference and add value. Initially, this will include developing our



understanding of how we can best fund, support and inform work around routes into education and work for young people based on our experience in this area to date.

Poverty and trauma are not inevitable; there are things that we can all do to address and mitigate their causes and impacts and support a fair and compassionate society where everyone is valued and able to flourish. But for change to happen, we need to work differently, smarter and together. The scale and complexity of the challenges presented by poverty and trauma, and the wider changes our world is facing, are far too big for any one of us to address on our own. However, collectively, with a clear shared goal and a will to change, we can achieve a major reduction in poverty and trauma and the risks they create.

Section 2

Context: poverty and trauma

At the heart of our strategy is a recognition of the heavy, but unnecessary, burden that poverty and/or trauma places on the physical, mental and material wellbeing of individuals, families and communities, and the detrimental impact this has on people's lives.

It is estimated that 17% of Scotland's population (910,000 people each year) were living in absolute poverty after housing costs in 2016-19. During the same period, it is estimated that 24% of children (230,000 children each year) were living in relative poverty after housing costs. ⁽¹⁾

Figures show that, overall, poverty declined in the first decade of the 21st century before beginning to rise again from around 2012. ⁽²⁾ Even before the current public health crisis we knew that the impact of poverty on people's lives was widespread and devastating.

Over and above the immediate financial hardship that people living with poverty experience, many also face stress, social isolation, shame and stigma. In the longer term, poverty affects people's health and wellbeing, limits their ability to live full and fulfilling lives and can affect their life chances.

The last two decades have brought an increased understanding of how childhood experiences can affect people throughout their whole life. There is growing evidence that trauma, particularly when experienced during childhood, can impact on an individual's long-term health, wellbeing, educational and life chances. Trauma can and does occur at all stages of life.

The toxic stress caused by childhood trauma (often referred to as Adverse Childhood Experiences or ACEs) can affect healthy brain development. But perhaps more surprising is the growing evidence that experiencing trauma as a child can bring about physiological changes to a person's body as well. Indeed, there are links between ACEs and the likelihood of developing long-term health problems such as heart disease, stroke, cancer, and diabetes.

In Scotland, it is estimated that between 500,000 and 750,000 are affected by their Adverse Childhood Experiences. ⁽³⁾

How do poverty and trauma interact?

The links between poverty, trauma, and ACEs are complex and there is not a simple link between the two. There is, however, growing evidence of an association between deprivation and ACEs ⁽⁴⁾ and, that risk factors “cluster together in the lives of the most disadvantaged young people”. ⁽⁵⁾ There is also evidence that people who experience ACEs are more likely to experience poverty as an adult. When children experience poverty and trauma at the same time, the impacts can be even more profound, damaging and long-lasting.

Section 3

Vision, mission, aims and values

The vision, mission and values of our new organisational strategy are rooted in our heritage.

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

- Ethel Robertson

The Robertson Trust was established in 1961 by the Robertson sisters Elspeth, Agnes and Ethel who donated the shares in their businesses, founded and developed by their grandfather and father, to The Trust for charitable purposes.

The sisters were among the first Trustees, serving for a combined total of 71 years and ensuring The Trust upheld the principles at the heart of the family: honesty, integrity and a willingness to help people in need.

Over our 60 years, we have sought to build on their legacy, and will continue to do so throughout this strategy by targeting the specific barriers of poverty or trauma, or both.

Our **vision** describes what we want to achieve:

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

Our **mission** describes how we plan to get there:

We work with others, using all our tools and resources, to improve the wellbeing of people affected by poverty and trauma.

Our **aims** set out what we want to achieve over the course of the strategy:

Over the course of this strategy we want to deliver positive values against our mission. We want to see the support systems and services for people facing poverty and/or trauma transformed, and we want to support the testing and scaling of more evidence-based interventions and ways of working that address poverty and/or trauma in order to find lasting and meaningful solutions. We recognise that this work is complex and that setting out hard measures for impact is unlikely to benefit those we are working with. Instead our work will focus on understanding who is doing work that is addressing poverty and trauma, what is being achieved, where the barriers are and where there are opportunities to “break through”.

In order to do this, we will **fund** and **support** organisations working to improve people’s life chances by:

- developing understanding of the causes and impacts, and working to deliver potential solutions to poverty and/or trauma
- reducing the occurrence, of poverty, trauma or both
- improving the ways that services and systems supporting people facing poverty and or trauma are designed and delivered

We want to use learning from the activities we fund and support in order to **inform** our own work and that of others working to address poverty and trauma. In particular we will use the period of this strategy to develop and enhance our culture and ways of working in recognition that this is more directly within our sphere of influence and the space where

we can take direct action to make changes of all scales that leads to progress in the short to medium term.

Our **values** are the qualities that we seek to bring out in our work in order to make the vision and mission real:

Our values are part of everything that goes on at The Robertson Trust. They are the cornerstone of our identity, a route map for our actions and a “north star” when making decisions and working with others, both internally and externally.

<p>We are ambitious</p>	<p>We are not afraid to take on difficult issues and will take risks in pursuit of positive change. We underpin our approach with curiosity, agility and a commitment to learning and continuous improvement.</p>
<p>We connect</p>	<p>We work collaboratively and are informed by the knowledge and experience of those we work with. We are compassionate in our interactions and value quality relationships based on honesty, understanding and support. Our independence is a valuable asset, but we recognise that working with others makes us all stronger.</p>
<p>We act with integrity</p>	<p>We take personal and collective responsibility for our actions and how we use our resources. We are trustworthy, consistent, and open about our successes and failings. We welcome challenge and feedback in order to improve our work.</p>

Section 4

Our objectives

Over the course of the strategy we want to see a transformation of the support systems and services for people facing poverty and trauma, in order to improve their experiences and life chances.

Here we set out how we intend to deliver on our strategy against our three key objectives – to fund, to support and to inform.

To fund

Our financial resources are one of our greatest assets and over the next 10 years, we expect to share in excess of £200m directly with organisations working to address poverty and trauma in Scotland. We will:

- fund organisations seeking to address the immediate needs of their communities in relation to poverty and trauma
- shift the focus of our work to organisations seeking to provide earlier help to people and communities, and which aim to improve the design and delivery of systems and services supporting people affected by poverty and trauma
- fund ambitiously and flexibly, encouraging communities to test and improve new approaches to addressing poverty and trauma and to do more of what works
- consider how we can use our financial resources innovatively to support our work through the adoption of different funding models.

To support

Over the course of the strategy we wish to support capacity and skills development within communities and the third sector. We will:

- consider how best we can add value to support capacity, skills and capability within the organisations we fund, and the third sector more broadly
- amplify the voices and experiences of the people and organisations working around poverty and trauma and speak up on issues directly affecting the third sector's ability to address the root causes of poverty and trauma
- support the development of multi-agency initiatives and true partnership between organisations with shared goals, cultures and values, which aim to improve how systems can be developed to support solutions to poverty and trauma
- develop our systems and processes to make it easier for organisations and communities to access our support and make the difference they want.

To inform

We want to use our experiences over the course of the strategy to build and inform our own practice, and that of others. We will:

- build and share our understanding and learning around poverty and trauma, their causes, consequences and potential solutions
- utilise networking and convening opportunities to develop robust and open conversations around topics relating to our work
- identify where our work can best add value to the system in order to better target our resources, developing programmes in identified areas that will build evidence around potential solutions to poverty and/or trauma
- continually review our own ways of working, culture, behaviours and processes in order to ensure that these fully reflect our stated principles and values.

Section 5

What we are interested in

The Robertson Trust recognises that we have a responsibility to build on our existing knowledge of poverty and trauma, and grow understanding of the solutions to both, taking account of what works best where, and for whom. We will use this knowledge to focus and develop our work and partnerships.

Over the course of the strategy, we are interested in building and applying our own knowledge and understanding in the following areas:

- the ways in which people's lives are affected by poverty and/or trauma, and how these can be addressed – in this document, these are referred to as THEMES
- how the way we, and others, work can help to reduce the effects of poverty and/or trauma on people and communities – in this document, these are referred to as APPROACHES
- how personal and societal circumstances can compound the impacts of poverty and trauma on all aspects of our lives. This includes geographical communities, and specific demographic communities affected by poverty and trauma – we refer to these in this document as GROUPS

In the early stages of delivering our new strategy, we will focus on building our own understanding of these themes, approaches and groups in order to help us identify where we want to focus our work to best add value to the existing system. We intend to invest significant time to listening and researching, engaging our networks, building relationships, and utilising information from our existing programmes of work to help us better understand these issues and our role in addressing them. All of this activity will be driven

by our desire to identify and develop new solutions that work in practice – solutions that are borne out of the significant expertise and know-how of the organisations we fund in the areas of poverty and trauma.

Themes

A wealth of knowledge already exists on how people and communities are affected by poverty, trauma or both. Over the period of this strategy we will build on existing knowledge to inform the development of our work in three key thematic areas:

Financial Wellbeing: addressing the financial and material effects of poverty on people and communities

At its heart, poverty is a problem rooted in a lack of access to financial resources. Existing evidence suggests that the best solutions to poverty include consideration of how to support people with their financial needs. We want to understand the causes of poverty and financial need, and to explore and support interventions and approaches which address them.

Emotional wellbeing and relationships: ensuring people have emotional wellbeing and confidence and strength in their relationships with others

People's life experiences and chances are affected by the physical, social and economic environment they live in. We know that the relationships people experience, particularly as children, can affect their health (physical and mental), wellbeing, lead them to engage in risky behaviours and limit their life chances over their entire life course (complex trauma). We also know that a connection exists between the relational trauma that people experience in their lives and poverty.

Evidence suggests that having safe and secure environments and relationships can provide protection for people who may be at risk of experiencing financial hardship and can prevent people from experiencing trauma.

We want to build our understanding of how the relationships people experience, particularly as children, affect their health and wellbeing (both physical and mental).

We want to better understand the relationships that exist between trauma and poverty, and to support trauma and poverty informed interventions and approaches which support people's emotional wellbeing and place strong and trusted relationships at their centre.

Educational and work pathways: Equipping people for the future through learning and skills pathways

Poor educational outcomes are a key indicator of experiencing poverty in later life, with fair/good work recognised as one of the best protections against poverty. We are interested in supporting work which helps people to engage with and progress through education to secure employment with opportunities to progress as a key factor in reducing the risk of experiencing poverty.

Approaches

Through our own experience, and development of this strategy, we have identified several approaches and ways of working that we believe are likely to support positive outcomes for people experiencing poverty and trauma. We will be exploring what they mean to us, and others over the coming year. We have the ambition to deliver our approaches in partnership and through collaboration with organisations with existing knowledge and best practice in overcoming the effects of poverty and trauma. These include:

- **Community:** communities provide a crucial protective function for people by providing them with networks, relationships, support, services and often a sense of purpose. We want to champion the role of communities (both geographical communities and specific demographic communities) in addressing the challenges they face and are interested in how communities can be supported and resourced to develop their own solutions to poverty and/or trauma.
- **Relationships and rights:** we are interested in work that considers the specific needs and rights of individuals. We will explore what this looks like by supporting organisations taking a relational approach to their work with a focus on the fundamental principles of fairness, dignity and respect.
- **Collaboration:** the scale and complexity of the problems relating to poverty and trauma requires a collaborative approach, often across sectors. We will work to understand what good collaboration looks like and what conditions need to be in places for this to happen. We are particularly interested in considering how systems can adapt and change to meet the needs of the people they serve, and how more work can be done to provide early help to people experiencing hardships related to poverty and trauma.

Groups affected by poverty and trauma

It is recognised that certain groups of people, are more likely to experience poverty or trauma, or both, often for extended periods of time. We also know that the changing world we inhabit, and in particular the health crisis and economic crisis caused by the coronavirus pandemic, increases the likelihood of more people experiencing poverty and trauma in Scotland in the decade that spans our strategy. Groups more likely to experience poverty include women and especially single parents, families with three or more children, disabled people and carers, people from BAME backgrounds, people locked out of secure employment, people living in certain geographic locations and asylum seekers and refugees.

We also recognise young people as being at increased risk of being adversely affected by changes to labour demand and access to education and skills development. People experiencing severe and multiple disadvantage are likely to be in deep, enduring poverty or face destitution.

Over the course of the strategy, we will seek to build our understanding of how and why these different groups are more affected by poverty and trauma. We will work to consolidate existing relationships and build new connections with organisations supporting these groups, and help them to expand existing proven solutions and develop new ones.

Section 6

How we will implement the strategy

We will use the period of this strategy to affect transformative change around how poverty and trauma are understood and addressed. We aim to fund and support those finding solutions to poverty, trauma or both, by sharing our resources and using all of the tools at our disposal. In turn, we aim to inform our own work and support change within the wider policy and practice environment.

We will continue to fund work within communities through providing funding directly to third sector organisations under our broad areas of interest. We also want to develop a more holistic approach by developing programmes of work in specific areas where we judge that we are able to add most value.

We will support these programmes through our resources, research, convening, networking, policy influencing and advocacy, widely sharing what we learn and using that learning to inform how we can develop to be the best funder we possibly can.

Our resources

We will continue to fund activities in communities through grants and provide financial and development support to young people wishing to pursue further and higher education.

However, we also want to focus more on enabling change at a system level and supporting interventions which engage and provide support earlier to prevent people experiencing the worst impacts of poverty and trauma in the first place.

We will explore other ways in which we can deploy our financial resources to support the efforts of organisations. This includes exploring alternative funding approaches, flexibility and duration of funding. We recognise communities, and the organisations working with them, are best placed to make decisions that will affect them, and we will always try to provide resources as close to communities as possible.

Our perspective

As a national funder, with a 60-year history of operating across Scotland, we have a distinct perspective around the challenges facing diverse communities. We will use our position and perspective to identify patterns, trends and issues in order to inform our own work, and that of those we work with.

Our position as an independent funder also enables us to adapt quickly to the changes we see around us, and to be a catalyst for work which may be longer term, more challenging or come with a higher level of risk.

Our platform and voice

We will use our voice to support, inform, champion and inspire. We will seek to regularly share evidence and stories from our work and those we work alongside to support wider conversations around poverty, trauma and social change.

We will seek to widen our platform to amplify the voices of others and advocate for those we support, ensuring that the voices of individuals, communities and the organisations working with them, are heard.

Our networks and relationships

Using our network, we will start discussions, encourage new voices into the conversation and make connections that will allow effective approaches to addressing poverty and trauma to progress.

We will acknowledge the power dynamics that can often exist when a funder is in the conversation and will work to address these, ensuring that we always use our influence responsibly.

Where communities tell us there is real need, we will work with them to identify where we can most effectively make a difference and add value. We will do this by identifying, championing and supporting organisations and communities who are delivering solutions to poverty and trauma.

We will build diverse coalitions of partners who share our vision of a fair and compassionate society to develop longer-term programmes of work in specific areas.

Our knowledge and learning

We will take a learning approach to our work. We are committed to being curious, seeking out a range of perspectives and building our own knowledge around our areas of interest to inform our work. We welcome challenge and will use a range of evidence to inform our choices.

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.

Section 7

How we will track our progress

Over the ten-year course of this strategy, we want our work, and the work we fund and support, to deliver positive value against our mission. However, we know that we are only one small part of a large system working hard to address a complex set of problems. This means that setting hard measures for impact is unlikely to benefit us, or those we are working with. We need to be comfortable with a high level of ambiguity, ready to “wait and see” where and how value is being delivered.

We want our approach to focus on understanding who is doing work aimed at tackling poverty and/or trauma, what is being achieved, where the barriers are and where there are opportunities to “break through”. We want to be forward looking and agile and will concentrate on building a range of supporting evidence that will help us to address our key learning questions and to think about “what next”.

We recognise that focussing on our own culture, our decision making, our experience, our relationships and our influence provides us with the biggest opportunity to bring about change. Our progress in evolving our own ways of working is where we expect to see the strongest indicators of success in the short to medium term.

Fundamental to this approach is that we see our strategy as a living document that will evolve as we learn about how we can be most effective. We will regularly review our course and progress to ensure that we can bring most value to people’s lives through our work, striving to always offer the best combination of support and resources to drive lasting change.

References

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