



WILLIAM GRANT
FOUNDATION

Annual
Review 2017

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 founded in Scotland 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 over £6 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 are:

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

The groups' work is facilitated and supported by two members of staff 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 wherever they are in the world. This constitutes a fifth strand of the Foundation's activity.

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.

Image: John Kenny plays a reconstruction of the Tintignac Carnyx. Photo by Francesco Marano

Cover Image: Upland's Modern Makers programme provides work experience for young people with contemporary crafts businesses





Chairman's message

During 2017, the Foundation continued its work supporting our vision of a Scotland where everyone has the opportunity to thrive. Total grant-making grew to £2.19 million (2016: £1.84 million), supporting an expanded portfolio of 68 organisations. The increase was spread broadly across our four themes. Employee-led Giving – which supports causes chosen by William Grant & Sons employees – also grew, with increasing impact both in the UK and beyond.

We strive to be a listening organisation learning constantly through engaging with our charity partners as well as seeking opportunities to hear the voices of people engaged in the issues and communities that we aim to support. I had an opportunity to do this when I attended a roundtable meeting in Girvan where four students from the local Academy presented ideas on how to make their town in Ayrshire the 'best place to grow up'. The discussion led to agreements to work with them to strengthen community-based

programmes and to explore opportunities to improve local facilities.

A highlight this year was the visit of President Obama to Scotland in May 2017 when we invited some of our partner youth organisations to each nominate a young person to attend the event in Edinburgh. During the evening, hosted by Sir Tom Hunter, not only did our young guests hear the inspiring oratory of the former President, they were also excited to each meet J. K. Rowling.

As one of the largest philanthropic funders in Scotland we have a responsibility to use our resources effectively, so it is important that we listen to our communities and partners, tailoring our support to meet real needs. We are grateful to our grantee organisations for sharing their knowledge, and look forward to developing more partnerships in the future which strengthen Scotland's social and cultural fabric.

GRANT GORDON
Chair

“We strive to be a listening organisation learning constantly through engaging with our charity partners.”

Chief Executive's summary



This year we continued to build on the interests and relationships established in our first two years. The following pages list the grants we've made under each of our four themes, and describe how our approach is developing in each area.

Across our giving groups, our strategy has three elements:

- Selecting the right partners
- Adding maximum value with our funding
- Learning – about the causes we give to and about how to be an effective funder.

We've maintained support for many grantees we funded last year but also supported 26 organisations for the first time. We continue to build our knowledge and networks to identify effective and dynamic partners to support – whether by research or referral. We are grateful to the other funders, charities and individuals who generously share their expertise and insight to help us identify where best to target our funds.

All our grants begin with a conversation to identify how best to support an organisation. A third of our grants this year were unrestricted – to be used flexibly by the grantee. If we give funds for a specific purpose, it will have been arrived at

through dialogue about the organisation's needs and priorities. The case studies in this review illustrate both the valuable work of our grantees and also the benefits of this approach.

A number of our grants this year have supported research, to support both our own and others' learning. One example, the Environmental Funders Network's *Where the Green Grants Went Scotland* report, has been widely welcomed by other funders and environmental organisations and suggests there can be a good return on investment from this kind of grant.

We also spent some time this year reflecting on how our early grants had performed. Whilst the majority had met our expectations, we learned there are things we can do to improve our success rate, including communicating our expectations more clearly to grantees.

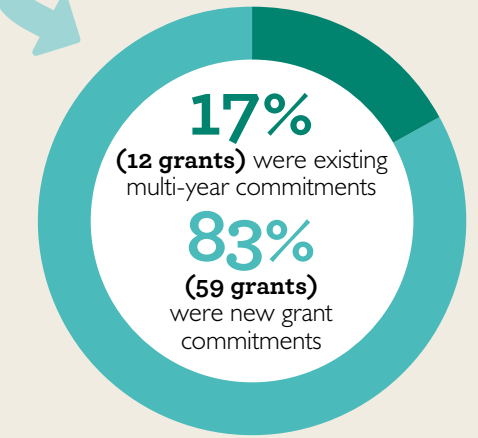
In the year ahead we aim to continue learning – to increase our effectiveness as a funder and to enhance the ultimate impact of our grant-making on Scotland's people and communities.

NICK ADDINGTON
Chief Executive

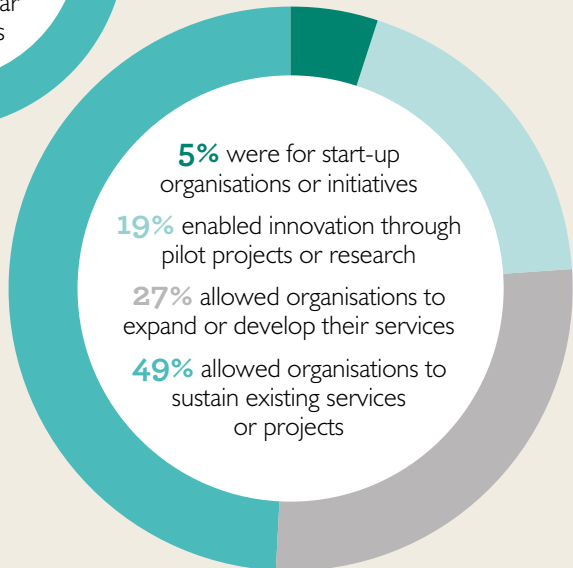
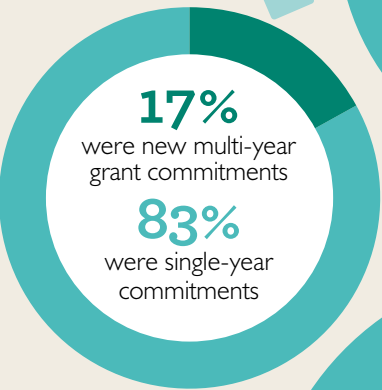
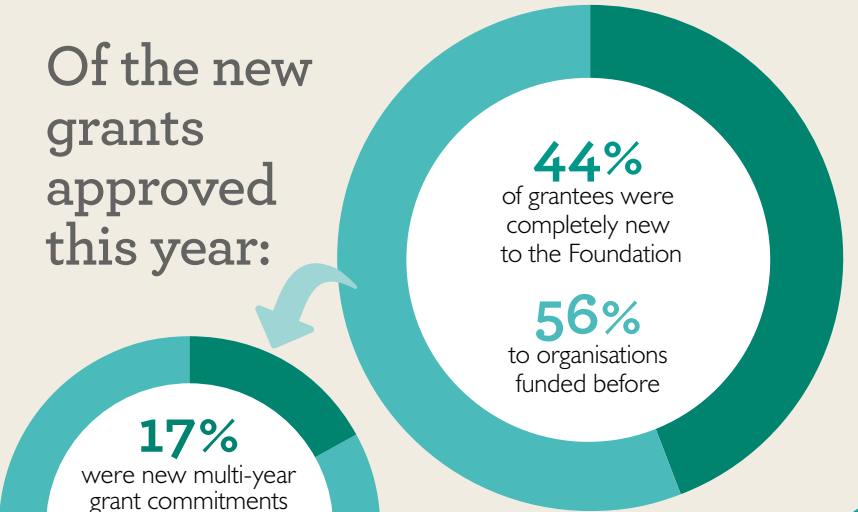
“All our grants begin with a conversation to identify how best to support an organisation.”

2017 in numbers

TOTAL GRANT-MAKING THIS YEAR: £2,193,097



Of the new grants approved this year:



Of all grants paid:



- 19** full-time jobs (or equivalent) were created or sustained specifically thanks to our funding – our unrestricted grants will have supported more, too
- 9** grants specifically enabled grantees to undertake research, evaluation or learning
- 6** grants supported campaigning, advocacy or policy work by grantees
- 6** grants related to buildings or equipment – £94,750 was given for capital spending, 4% of the total donated
- 4** grants supported the replication of services or new ways of working to Scotland from elsewhere or to new parts of Scotland
- 288** employees used the Foundation's Matched Giving scheme to support 186 charities

Health and social causes

Our Health

and Social Causes group takes a proactive, research-led approach to identifying causes to fund. We work closely with sectoral expert organisations: in our partnership with fellow funder the Life Changes Trust (LCT) we provided matched funding alongside theirs to sustain four exemplary dementia-friendly community projects beyond their initial pilot phase. We are also pleased to have enabled LCT to employ a researcher to investigate how new technology can help people with dementia and to identify opportunities for further innovation.

Only two of the organisations we supported in 2017 were new to us, reflecting

our continued interest in our chosen thematic areas. We chose to make repeat grants to many of the previous year's grantees, allowing us to continue to develop our relationships and learn more from their work.

For 2018 we have decided to focus our efforts within two key themes: improving life chances for the most disadvantaged children and young people, and helping people live well with long-term or life-limiting health conditions. This refocusing does mean that 2017 was the last year – for now – when we will make grants to support refugees and vulnerable migrants.

CASE STUDY: Early Years Scotland

Learning how strengthening families reduces reoffending
Our donation: £30,000 (over three years)

More children in Scotland each year experience a parent's imprisonment than a parent's divorce. The resulting breakdown of family relationships can lead to a higher risk of reoffending and of children becoming offenders themselves despite being innocent victims of their family circumstances.

Through its Children Affected by Imprisonment programme, Early Years Scotland works in six prisons facilitating sessions with fathers and their children to foster stronger relationships.

"We know this support helps maintain stronger and more positive relationships," says Jean Carwood-Edwards, the charity's CEO. "Fathers learn to play and interact much better with their children, and say they feel more determined not to reoffend due to a sense of responsibility for their children's lives.

"But we will only be able to change this cycle of disadvantage if we understand just what makes the most difference. There is a need, in particular, for child-focused work which explores children's experiences as they engage with their father in the prison."

That's why our three-year grant is part-funding a PhD studentship within the Social and Public Health Sciences Unit at Glasgow University to evaluate Early Years Scotland's programme. The PhD student is already fully engaged in the practical work in the prisons.

"We look forward to learning more about how we can help children have better outcomes," says Jean, "and to share this learning nationally, so that together we can help break the patterns of unfair disadvantage that come from cyclical reoffending."

Total value of grants paid

£348,300

Refugees and vulnerable migrants

£40,000

Positive Action in Housing, Glasgow
To support refugees and vulnerable migrants facing hardship and destitution.

£15,000

Govan Community Project, Glasgow
To support a range of services for new residents and asylum seekers.

£5,000

Refugee Survival Trust, Glasgow
To provide emergency financial assistance to refugees and asylum-seekers facing destitution.

Young people's mental health

£60,000

Place 2 Be, Scotland-wide
To support expansion of school-based counselling services in Scotland.

£30,000

SAMH (Scottish Association for Mental Health), Scotland-wide
To support the 'Going to Be' campaign raising awareness of young people's mental health needs.

Vulnerable or marginalised young people

£35,000

Who Cares? Scotland, Scotland-wide
To support work giving a voice to young people with experience of the care system (year two of a three-year grant).

£20,000

Stable Life, Scottish Borders
To support equestrian activities with vulnerable young people to build confidence and resilience.

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People affected by dementia and their carers

£75,000

Life Changes Trust, Scotland-wide

To maintain and develop activities by four dementia-friendly community projects.

£15,000

Age Concern Eastwood Dementia Project, East Renfrewshire
To employ a part-time care assistant to support high-needs clients.

£23,300

Life Changes Trust, Scotland-wide
To conduct a research project scoping opportunities for technology to support people with dementia and their carers.

Early Years

£20,000

WAVE Trust, Scotland-wide
To support work promoting understanding, research and best practice in prevention of childhood trauma and abuse.

£10,000

Early Years Scotland, Scotland-wide
To part-fund a PhD studentship to evaluate Early Years Scotland's work with families affected by imprisonment – a further £20,000 is pledged over the next two years.



Working with horses at Stable Life



Upland's Modern Makers work experience programme

CASE STUDY: Hands up for Trad

Renewing the Tradition
Our donation: £30,000 (over three years)

"In my own life, singing is such an important way to foster wellbeing and connection with other people, so I'm delighted to have conjured an uplifting song that can take its own journey now..." says Karine Polwart, one of Scotland's leading singer-songwriters and one of 13 artists commissioned to write new pieces especially for community choirs as part of this creative project.

Devised and co-ordinated by Hands up for Trad – organisers of the annual Scots Trad Music Awards – the three-year project saw a handful of these new songs each year taught and performed at community workshops in 22 venues across Scotland.

Each songwriter was asked to choose a Robert Burns poem and rewrite it into a modern version or to write a new Gaelic song to reflect contemporary styles and culture. The result is a set of songs that are modern, singable and relevant, but informed by Scotland's rich traditions.

In total, 960 people have taken part in workshops and the songs are being performed regularly by the songwriters themselves as well as by choirs across Scotland and beyond. A songbook, entitled *Renewing the Tradition*, is on its second print run.

"Hands up for Trad believes that singing is for everyone and that the role of a choir in building a community that celebrates its members is as important as any final performance," says Persephone Nichol-Bose, Hands up for Trad's Development Manager. "It was great to find a funder in the William Grant Foundation whose interests were so in tune with our desire to invigorate the community choir sector by enriching the repertoire of Scottish song."

Scottish Culture & Heritage

During 2017, we continued to make grants relating to four aims:

- Preserving, researching and showcasing aspects of Scotland's heritage – especially those most at 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.

The Foundation inherited an important legacy of support for Scottish piping established by William Grant & Sons over previous decades and piping continues to account for approximately one third of our giving under this theme. In 2017, we commissioned a report mapping Scotland's 'piping ecology' and began conversations to explore how – with other supporters – piping can be helped to thrive in future.

This year marked a new development in our long relationship with the National Museums of Scotland. Having supported capital projects before, our latest grant is funding research into aspects of their collections related to Highland culture. We look forward to learning more about this much romanticised aspect of Scotland's unique heritage.

Total value of grants paid

£355,300

£15,000

National Theatre of Scotland
Towards the cost of SHIFT – a participatory theatre project involving people and communities in North Lanarkshire.

£15,000

V&A Museum of Design, Dundee
Towards the costs of employing a Young People & Families Producer in the run-up to the museum's opening (year two of a three-year grant).

£10,000

Dumfries & Galloway Arts Festival
To support the Arts Live year-round programme of events.

£10,000

Cumnock Tryst, East Ayrshire
Towards the cost of the 2017 music festival.

£21,000

Dumfries & Galloway Arts Festival

Towards the cost of the annual festival – a further £42,000 pledged over the next two years.

£25,000

Piping Live! Glasgow
To support the 2017 Piping Live! Festival

£15,000

Traditional Arts & Culture Scotland (TRACS), Scotland-wide

Towards the cost of the People's Parish project supporting communities to document local cultural heritage across Scotland.

£20,000

Fruitmarket Gallery, Edinburgh

To support a programme of community engagement – a further £20,000 is pledged for 2018.

£11,000

The Bernat Klein Foundation

To establish the Foundation to manage the creative legacy of Klein, a Scottish-based textile designer and artist – a further £2,750 is pledged for 2018.

£16,750

Carnyx & Co, Edinburgh

To commission a reconstruction of the Deskford Carnyx, a Celtic instrument, for education and performance, and the commissioning of a new piece of music.

£7,450

Scottish Traditional Skills Training Centre, Aberdeenshire

To assist with the costs of moving the Centre's operational base to Duff House in Banff.

£41,100

National Museums of Scotland, Edinburgh

To employ a research fellow for two years to investigate the material record relating to the romanticisation of Highland culture – a further £41,947 is pledged in 2018.

£10,000

Hands Up for Trad, Scotland-wide

Towards the cost of the Scotland Sings project which works with community choirs to enrich the repertoire of Scottish song (year three of a three-year grant).

£7,000

Upland, Dumfries & Galloway

To support the Modern Makers work experience programme – a further £14,750 is pledged over the next two years.

£20,000

Make Works, Scotland-wide

Towards expanding the online directory of Scotland's fabricators and manufacturers.

£10,000

Scottish Schools Pipes & Drums Trust, South Ayrshire

Towards the cost of a piping and drumming tuition programme in Girvan schools (year two of a three-year grant).

£5,000

National Piping Centre

To undertake research into the landscape and funding of Scottish piping.

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Support for solo piping competitions

£66,000

National Piping Centre
Glenfiddich Piping Championship

£15,150

Scottish Piping Society of London
London competition

£5,250

Skye Piping Society
Silver Chanter competition

£3,900

The Capt. John Maclellan Recital, Edinburgh

£2,775

Competing Pipers Association

£1,650

The Argyllshire Gathering
Senior Piobaireachd competition

£1,275

The Atholl Gathering, Perthshire

The group expended a further £26,522 on small grants and activities to support the organisations it funded.

Youth Opportunities

This strand of our giving is place-based, focusing on young people living near our company's locations in Dufftown in Moray, Bellshill in Lanarkshire and Girvan in South Ayrshire. Our vision is that more of them move successfully from school into employment, education, or training and go on to fulfil their potential.

During 2017, we continued our research into needs and opportunities in each location. Visits to local youth services and charities have been helpful but it is by developing relationships with local schools that we have learned the most. We aim to build on these relationships and conversations in the year ahead.

In Girvan, we increasingly see opportunities for young people as bound up with the

general regeneration of the town. In Moray, whilst continuing to support Speyside Youth in Dufftown, we are learning about needs in the wider region, too. And in Lanarkshire, we working to understand the context in this complicated, largely urban area.

Two common issues have emerged, however: the impact of poverty and family circumstances on children's ability to thrive and the need to better support young people's mental health.

Finally, we were delighted the Big Lottery Fund joined us from this year in funding the Pathways to Confidence project in Lanarkshire. With them, we continue to support the project partners to develop and learn from this innovative whole-family support model.

Outdoor activities with ACE on Girvan Beach

CASE STUDY: Adventure Centre for Education

Finding the spark
Our donation: £49,320 (over two years)

Nine unemployed young people face a brighter future thanks to this project delivered by Girvan-based Adventure Centre for Education (ACE). ACE seeks to get people active in the beautiful environment of South West Scotland. It offers tailored outdoor adventure activities for all abilities, working with schools, community groups and commercial clients.

Recognising that school leavers in the small seaside town of Girvan faced a limited range of local work or training opportunities, ACE wanted to offer work placements as a way of igniting the spark that might motivate young people to find a career best suited to them.

Our 2016 grant-funded six-month trainee positions during which the nine young people worked alongside ACE's outdoor instructors to help prepare and deliver activity sessions from mountain biking to paddle boarding. As well as achieving outdoor skills and qualifications, trainees had to communicate with a wide range of clients and colleagues and take responsibility for elements of the programme, boosting confidence and a sense of achievement. "You can see it on their face," says Chris Saunders, ACE's Manager, "when they come back from a successful session they've helped to lead."

And the results are positive: seven young people went on to find jobs; the other two entered further education. One has even joined the board of ACE!

In 2017, we made a further grant to allow ACE to offer subsidised activities to more young people who might see outdoor adventure as beyond their reach or ability, looking to ignite more sparks of confidence and ambition in the region's young people.

Total value of new grants committed

£351,598

Grants marked (FS) are routed through our grant-making partner Foundation Scotland. Foundation Scotland also released the following additional funds held by them on our behalf during this year to grants committed prior to the establishment of the Foundation:

- **£43,328 to COVEY Befriending** and **£37,110 to YMCA Bellshill & Mossend**, both for the Pathways to Confidence project in Lanarkshire.
- **£19,875 to The Conservation Volunteers (TCV)** for the Get Some Credit vocational skills project at Girvan Academy.

South Ayrshire

£34,098

Carrick Centre, Maybole (FS)

Towards the cost of employing two youth workers for one year.

£2,500

Girvan Academy

To provide resources and activities that tackle barriers to learning for children experiencing poverty or disadvantage.

£50,000

ACE (Adventure Centre for Education), (FS)

To provide outdoor activities to schools and youth groups who would otherwise be unable to access such opportunities, over two years.

£50,000

Stepping Stones for Families (FS)

Towards the costs of the Girvan & Carrick Money Advice Service for families over two years.

Lanarkshire

£15,000

First Port

To provide seed funding for new social enterprise ideas incubated through the What If? Girvan initiative (year two of a three-year grant).

£75,000

COVEY Befriending and YMCA Bellshill & Mossend (FS)

Towards the Pathways to Confidence project supporting young people and families.

£10,000

Bellshill Academy

To provide resources and activities that tackle barriers to learning for children experiencing poverty or disadvantage – a further £10,000 is pledged for 2018.

£5,000

Moray School Bank, Moray

To provide school clothing and winter coats for children of families experiencing poverty.

£35,000

Speyside Youth (FS)

To fund a youth drop-in service and related activities in Dufftown for one year.

Moray

£10,000

Cardinal Newman High School

To provide resources and activities that tackle barriers to learning for children experiencing poverty or disadvantage – a further £10,000 is pledged for 2018.

£50,000

One Parent Families Scotland (FS)

To provide advice and services to single parent families over two years.

£15,000

Outward Bound Trust

To support the cost of the Mark Scott Leadership for Life programme delivered with secondary school children (year two of a three-year grant).

The group expended a further **£4,000** on donations and fees related to its research and consultation on local needs and opportunities in the three areas.



The Woodland Trust volunteers

CASE STUDY: New Caledonian Woodlands

Core funding during a time of change
Our donation: £29,000 (over two years)

Andy Ross founded New Caledonian Woodlands in 2007, growing it to an enterprise employing ten staff working with 1,000 people each year.

The organisation benefits people and planet, combining woodland activities for people experiencing mental ill-health with a range of environmental enterprises.

By 2016, Andy felt the organisation was approaching the right scale – “But we’d not quite managed to get to where we wanted,” he says. “We couldn’t get the support we needed to structure our business in a way that secured long-term financial sustainability and resilience.”

His ambition was to grow his core team so it had the skills and capacity to generate more of its own income; move into fit-for-purpose premises; and recruit a successor he could hand over the reins to. But with a shortfall in core funding he was struggling just to keep projects running, with no capacity for adapting and preparing for the future.

Our timely two-year grant was unrestricted, allowing flexibility to restructure and maintain core activities over the transition period. This flexibility turned out to be important as things didn’t go to plan: It took three rounds of recruitment to find the new director, and their old premises flooded.

“This kind of unrestricted funding is about trust,” says Andy. “Recognising that things change and problems arise, we were trusted to know our business needs and to make good decisions at the right times.”

In April 2018, the organisation is settled in new premises and planning modest growth in the year ahead. And Andy is handing over to a new director and moving on to his next adventure in Norway.

Natural & Built Environment

We dedicated time in 2017 to thinking about the key ingredients we value when supporting projects related to the improvement or creation of a building. Social benefit, community engagement as well as heritage value and good design were identified. Whilst we made a handful of such grants this year, we pledged a further £200,000, subject to the projects raising sufficient funds to proceed.

This is by no means guaranteed. During the year, we heard some projects we had pledged funds to previously will not go ahead. We will always give careful consideration to viability, but we also recognise the potential impact of supporting projects in the early stages when risk is higher but when a grant can be a catalyst to further development.

Meanwhile, our approach to the natural environment is evolving.

Our grant to Scottish Environment Link is enabling us to benefit from their broad insight and connections whilst supporting the organisation’s unique role bringing the environmental sector together to work towards a sustainable future.

The report we commissioned on environmental grant-making for Scotland is helping us understand how we can complement existing funding streams. It has also been welcomed by others in the sector, particularly for highlighting the disproportionately low value of philanthropic funding for Scotland’s environment. (Find the report here: <https://www.greenfunders.org/where-the-green-grants-went-scotland/>)

Total value of grants made

£200,249

£10,000

Highland Birchwoods, Inverness

Towards the cost of wilderness-based conservation activities with school groups.

£20,212

Clyde & Avon Valley Landscape Partnership, Lanarkshire

Towards a range of events and training activities promoting outdoor play and learning.

£9,237

Environmental Funders Network, Scotland-wide

To research and publish the Where the Green Grants Went Scotland report into environmental grant-making for Scotland.

£20,000

Scottish Environment Link, Scotland-wide

Core funding to support information-sharing, discussion and joint action by Scotland’s environmental charities – a further £40,000 is pledged over the next two years.

£13,800

Scottish Wildlife Trust, Ayrshire

Towards employing a full-time Community Engagement Officer for the South West region (year two of a two-year grant).

£20,000

The Woodland Trust, Scotland-wide

To part-fund a Volunteer Co-ordinator post for Scotland (year two of a two-year grant).

£11,000

New Caledonian Woodlands, Central Scotland

To support a range of woodland enterprise and wellbeing activities (year two of a two-year grant).

£20,000

Existing Homes Alliance Scotland, Scotland-wide

To support policy work to ensure the Scottish Government’s Warm Homes Bill brings low-carbon and affordable warmth to all households in Scotland – a further £10,000 is pledged in 2018.

£15,000

Scottish Dark Sky Observatory, East Ayrshire

Towards the cost of a new planetarium.

£3,000

Kirkcudbright Development Trust, Dumfries & Galloway

To support a feasibility study into a dark skies visitor centre within the former Johnston School building.

£7,000

Urras Dualchas Shiaboist (Shawbost Heritage Trust), Western Isles

Towards the development costs of a project to convert Shawbost Old Church into a heritage centre.

£11,000

Fife Employment Access Trust, Fife

Towards the development costs of a project to convert the former Silverburn Flax Mill into an enterprise and community hub.

£40,000

Glasgow Building Preservation Trust, Glasgow

Towards the cost of renovating the former Parkhead Public School to create a community hub.

In addition, further pledges totalling

£200,000

were made to assist with future capital projects to:

- Govanhill Baths Community Trust, Glasgow
- Gairloch & District Heritage Company, Wester Ross
- The Cabrach Trust, Moray

Strategic Investment grants

In addition to the work of our thematic giving groups, we sometimes make other grants which support our strategic objectives and have potential to achieve significant impact, build valuable partnerships or generate useful learning.

£500,000

William Grant Piping Trust

To establish the Trust as an invested charitable fund held by Scotland's community foundation, Foundation Scotland. The Trust will provide long-term support for the performance and study of the bagpipes in Scotland.

£30,000

The Lens

To deliver a collaborative shared programme to stimulate workforce-led innovation within four medium-sized charities over two years (year two of a two-year grant).

CASE STUDY: The Lens

Unlocking innovation from the front line
Our donation: £80,000 (over two years)

"We know innovation is essential, but creating the conditions for it to flourish is hard – especially in charities squeezed by rising demand and shrinking resources," says Steve McCreadie, founder and CEO of The Lens. Steve believes front-line charity staff are often best placed to spot how to do things differently and he set up The Lens in 2015 to empower them to put their ideas into action.

The Lens is a workplace innovation programme. It invites employees to put forward ideas and then supports these 'intrapreneurs' to hone their proposal and pitch for investment to a panel of their peers. Combined with support for managers it helps build an empowering, entrepreneurial culture.

The Lens had run successfully in larger charities before we invited Steve to consider how it could be implemented in medium-sized charities which wouldn't have sufficient staff to justify running the programme themselves. Steve's idea was to test a collaborative 'Shared Programme' for several charities at the same time: A single investment pot; a panel including one judge from each organisation; and joint workshops with participants from all organisations.

Our grant is enabling the Shared Programme to be piloted with four charities: Alcohol and Drugs Action, Beatson Cancer Charity, CLAN Cancer Support and Includem. Evaluation of the first round in 2017 found it to have been surprisingly effective. Participants highlighted the benefits of participating alongside colleagues from other organisations, including networking, learning from others and constructive challenge.

Says Steve: "A second round in 2018 will help refine the programme further and enable The Lens and our partner charities to learn more about how to harness the creativity and passion of their staff to improve lives."

Employee-led Giving

The Foundation wishes to encourage the energy and motivation that exists amongst the company's employees to support the causes they care about. So, in addition to its grant-making in Scotland, the Foundation supports charitable initiatives by William Grant & Sons employees wherever they are in the world.

It does this principally through two schemes, Matched Giving and Local Giving.

Both schemes grew substantially during 2017, involving more people and benefiting more charities in more countries.

In 2017, we also made a small number of donations to disaster relief charities where William Grant & Sons staff on the ground went above and beyond their regular duties to support local relief efforts in regions affected by hurricanes in the Caribbean and the Mexico earthquake.

Employee-led Giving has two key strands:

Local Giving: We delegate a budget to Local Employee Forums or Charity Committees at our company locations. They use this to make donations to local charities.

Matched Giving: We match money raised or donated by William Grant & Sons employees for their own chosen charities. We also make a donation to match every hour an employee volunteers in their own time.

Total value of donations paid

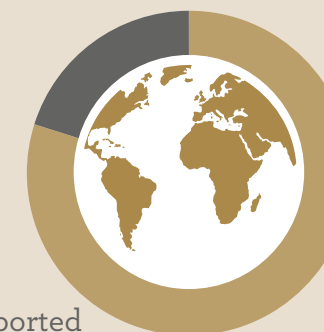
£308,489

Local Giving
£154,000

Donated to charities local to William Grant & Sons sites in UK, Ireland, US, Mexico and Taiwan. (2016: £79,500)

Matched Giving
£148,089
(2016: £125,223)

288
employees...

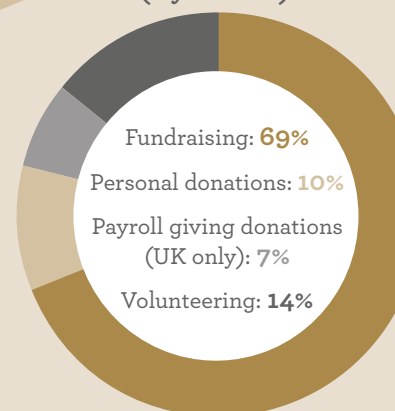


230 of these employees were UK-based
58 from other global locations

Disaster relief
£6,400

...supported
186 charities

Donations matched (by value):



The Lens, providing a different perspective on innovation

Expenditure 2017

Grant-making

Health and Social Causes	£348,300
Natural and Built Environment	£200,249
Scottish Culture and Heritage	£381,822
Youth Opportunities	£355,598
Employee-led Giving	£308,489
Strategic Investment grants	£530,000
Other donations	£68,639
Total grants and donations	£2,193,097 (2016: £1,837,574)

Foundation running costs

Staff, travel, office and admin costs	£136,077
Communications	£3,140
Learning events	£9,832
Foundation Scotland – grant-making services, Youth Opportunities	£27,901
Charities Aid Foundation – payroll giving and matched giving fees	£6,776
Subtotal	£183,726 (2016: £158,971)

TOTAL EXPENDITURE **£2,376,823 (2016: £1,996,545)**

Other donations

These include small grants and the value of William Grant & Sons’ products and in-kind donations given to support charity and fundraising events. Miscellaneous donations of £2,500 or more are listed below:

Rockefeller Philanthropy Advisers £10,000

Towards the costs of the Theory of the Foundation Learning Collaborative global initiative.

John Merricks Sailing Trust £5,000

To enable young people to take part in the sport of sailing.

Mortlach & Cabrach Church of Scotland, Dufftown £5,000

Towards the cost of creating level disabled access to the churchyard and church.

IFB Research Foundation £5,000

To support research into the family business sector.

The Hunter Foundation £5,000

To support youth charities in Scotland.

Birlinn Ltd £3,900

Towards costs associated with the publication of Scotland’s Secret History.

Girvan Town Team, South Ayrshire £3,000

To support the #FutureUnwritten heritage tourism project in Girvan.

Gordon Highlanders Association, North East Scotland £2,500

To support the costs of a 2017 VC commemoration event.

Gordon Highlanders Museum, Aberdeen £2,500

Towards the running costs of the museum.

The Distillers’ Charity £2,500

To support the Distillers’ Charity Auction.



Pipers in George Square, Glasgow for the Piping Live! festival
Thanks to all the funded organisations who supplied photographs for this Annual Review.

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