



30th Anniversary

LintelTrust Annual Review 2008-2009



30 years of grant-giving in Scotland

Convener's and Director's Report

Lintel Trust has now reached a milestone in its' grant-giving operation. For thirty years, Lintel (formerly known as SHACT – Scottish Housing Association Charitable Trust) has been supporting projects the length and breadth of Scotland helping pilot exciting new ideas which have often taken flight and grown, or helping more established projects move into different areas and themes of operation. We've learned from projects about how important their particular work is in localities across Scotland, and in turn, have also realised our worth in helping these projects along the way, and thus influencing policy.

Lintel continues to provide support to housing and community-related projects but finds itself, like so many others, being restricted from supporting the projects it would like to by lack of donations. As has been said many times, Lintel is quite a difficult organisation to 'pigeonhole' in any meaningful way: we exist to support others and then disseminate results of that work to as broad an audience as possible. We are not endowed, so don't have the luxury of relying on large amounts of cash always being available for our work. Every penny we have has been donated by other Trusts and charitable or organisations, by housing associations and commercial companies working in the sector. You may ask – 'What is the purpose of Lintel – we can surely donate money to projects ourselves?' Where Lintel offers a bit of an 'added bonus' is, in order to save your staff time, Lintel can source, support, and monitor projects on your behalf, thus saving your organisation being inundated with requests for support. We work with you to ensure that the eventual project/s which receive funding are the ones you want, and we then manage the evaluation of the project on your behalf. All you have to do is turn up to present the cheque to the lucky project!

Lintel continually strives to offer a quality service to those who donate, and to build good relationships with the projects it supports. We need your help now, more than ever. Please consider Lintel when thinking about supporting projects; you really have nothing to lose and everything to gain! My fellow Trustees and I, and Pauline as Director, look forward to working with you all in the future, and thank those who have already built a lasting relationship with us.

Thank you



*Robert McDowall,
Lintel Trust Convener*

30 Years Ago.... That was then.....this is now.....

The year 1979 saw a major change in housing policy, embodied in the introduction of the Right to Buy. Heralded as 'the new dawn' by the Conservative Government, it spawned a legacy that still has far-reaching effects in housing today.

Labelled at the time as a '...new code of rights for public sector tenants...' the Right to Buy was the single most important aspect of the Tenants' Rights, Etc. (Scotland) Bill 1979. Also, '...The Bill's provisions,...(were) likely to lead to a net reduction in public expenditure...' and 'The sale of public sector dwellings...will produce savings both in housing authorities' capital expenditure and in central government subsidies.' Note that a consolidation Act, the Housing (Scotland) Act 1987 (the 1987 Act) came into effect on 15 August 1987.

Some 30 years later, the whirlwind of Right to Buy sales, albeit slowed, has produced a seismic effect in what was termed for many years social housing, and now has become affordable housing. In Scotland alone, between 1 October 1980 and 31 December 2005, nearly 454,000 local authority and Scottish Homes dwellings had been sold to sitting tenants.

A new draft Housing Bill has been introduced by the Scottish Government, currently taking the form of a consultation document. It is planned to introduce this Bill to Parliament in 2010. One of the main proposals is to reform the Right to Buy, by ending the right to buy for 'new supply': 'new supply' will be any new lets after the date of implementation of the Act (as yet unknown), plus any re-lets of properties built after 25th June 2008.

However, it is not being suggested to halt the Right to Buy for those currently eligible to take this up, should that be their wish: just to end it for first time tenants, and for those returning to the sector from a different sector.

How SHACT Became Lintel Trust

Some thirty years ago this year, Lintel Trust (formerly Scottish Housing Association Charitable Trust - SHACT) was born. It grew from a need to support projects in the social housing sector from an independent source, with the view to it becoming a vehicle to share the results of work across the sector. This would save time and effort for those with specific projects in mind (as they may have been developed already), and would allow for the dissemination of the results of projects across the board.

At first, SHACT survived fully on the donations from housing associations, and their goodwill. SHACT staff were employed on a part-time basis and pushed for the growth of the Trust. Through time, shares were purchased by the Trust, utilising available resources, and some time later in the Trust's history, these were 'cashed in' thus taking Lintel above the £100,000 in available reserves.

This is where Lintel has remained over time: still providing the best service it can, but with limited resources. The 'grass roots' approach is still very important to all who are involved with the Trust, seeing this as a real strength in our work. We would, of course, like to crash through this £100,000-odd barrier in order that we can provide as many grants as we are asked, but this has proved difficult. Cultures of giving change over time, with more and more charities seeking support. Even so, Lintel endures, still knowing we have a useful role to play in grass roots support of projects. Often Lintel has 'taken a chance' on projects other funders were unwilling or unable to support, and only through our grant, matched funding has been found to help the project grow.

We still operate our three main programmes of giving.....

- Older People's Programme (supporting projects that help older people to remain in their own homes for longer, such as Care and Repair and Handyperson schemes);
- Mainstreaming Equalities Programme; (supporting projects helping those who find themselves to be disadvantaged in housing in some way, including people from Black and Minority Ethnic backgrounds, and disabled people);
- General Grants Programme (where we provide support to new and innovative projects at start-up, or where we help projects develop and expand into different areas).

How Lintel Helped Us....

We thought you might like to read a few comments that our grant recipients have made about LintelTrust.....

"Flooding in Ferguslie Park made national headlines in 1994. The Queen and Duke of Edinburgh came to visit our tenants a year later to see how they were recovering, and in Ferguslie fashion - they were bouncing back. For the 50 families who lost everything at ground level in the speed of the flooding, the grant from the LintelTrust helped make their repaired houses homely again with new vinyl in the kitchens and bathrooms. Lintel gave them a lift!" Robert Craig, Ferguslie Park Housing Association.

And On A Fun Note....

Lintel Trust has had many people run on their behalf both in the Glasgow Half-Marathon and 10k, and in the Edinburgh Marathon. Here's a photo from a few years ago, supplied by Marion Macdonald of Pineview Housing Association showing some tired but happy runners after the race - thanks Marion!



Our runners then were (from L to R): Alexis Sheldrick, Kirsty Anderson, Anne Lear, and Marion Macdonald.

Partners' comments: social housing 30 years from now...

We thought it might be interesting to ask some of our partners and friends their thoughts on how they felt social/affordable housing would look 30 years from now. Here are a few comments....

"I see a time when making sure the people of Scotland have access to affordable, warm, sustainable homes in a nice accessible environment is seen as just as important as health care, education, policing and transport. This being reflected in how the nation's resources are distributed".

Bryan Hay, Chief Executive, Fife Housing Association

"My hope would be that social housing will be seen as a valid and positive choice for people from all walks of life in the same way that it is viewed by many of our European partners".

Alan McGuckin, Chief Executive, Kingdom Housing Association

"The past 30 years have seen a dramatic change in the way social housing providers operate. From the late 1970s when the vast majority of people were tenants through to the 1980s and 90s when home ownership and Right to Buy legislation changed us into a nation of home owners. Now the tide seems to have shifted again and there is a desperate need for more affordable homes.

The challenge for the next 30 years will be for social housing providers to do more with less. This is where MITIE can help. In order to free up the valuable time of those working within the sector, I believe there will be a major increase in outsourcing, shared services, collaborative procurement and improved estates management. Cost savings will be generated where economies of scale can be introduced and, thanks to outsourcing, time and financial resources will be more readily available."

Craig Boath, Social Housing Director, MITIE Property Services

"I would hope to see a housing market that is generally much more flexible in terms of tenure options and choice and the removal of the term "social housing" thereby reducing barriers and stigma."

Jim Thomson, Chief Executive, Bield Housing Association



Bryan Hay



Alan McGuckin



Craig Boath

"In 30 years' time I would hope there will not be a product called social housing. There should be more choice within each community particularly for rented housing which will be the tenure of choice for a much wider range of socio-economic groups. Flexi-tenure will be the norm with people choosing at different periods of their life how they want to pay for their housing, either mortgage or rent.

Regulated housing associations/societies will be required to ensure a proportion of stock is available in each area to protect vulnerable groups, support key workers, enable local people to stay in their area of choice, and assist in creating balanced communities including helping owner occupiers to join neighbourhood regeneration schemes."

Peter Lee, Chief Executive Eildon Housing Association



Peter Lee

The great progress that has been made over the past 30 years in supporting people to live in the community rather than institutions has been possible because social housing providers have positively embraced the principles of ordinary living and have worked with support agencies to provide thousands of housing based opportunities for people to have ordinary lives.

This contribution continues to be needed. Success in housing based social care has increased expectations of what is possible, and the demand from people who need support, and their families, will continue to grow over the next 30 years.

Malcolm Matheson, Chief Executive, Key Housing Association



Malcolm Matheson

Providing good homes for people, not able to buy or rent in the open market will continue to be an issue that needs addressing. It is likely that the skills and resources of a mixed community of housing providers working closely together will be needed to provide these homes in times of increasing pressure on financial resources and low carbon living.

Gillian Lavety, Partnership Manager, Wates Scotland



Gillian Lavety

Projects we supported 2008-09

It's important that we can show you the depth and range of projects that donations made to Lintel Trust supports. For our larger-scale donors we offer the option for them to state where they would like their donation to go i.e. to a specific local geographical area, or to a specific Programme. Some of our Partners and general donors take up this option: others ask us to place their donations in our General Grants Programme.

Mainstreaming Equalities Programme

We have been fortunate in receiving a large donation to go towards our Mainstreaming Equalities Programme: we are actively seeking 'matched' funders so that we can give one lucky project the best chance possible of putting a new or innovative idea into practice.

Many projects are on three-year funding cycles with LintelTrust, and have now completed. We have now started out on a new stream of projects, and these are detailed below:

Organisation	Grant	Date of Grant	Purpose
Tenants' First Housing Co-operative	£30,000 over 3 yrs (entering Year 3 of award)	Mar 07	To contribute towards the cost of the recruitment of a Minority Ethnic Outreach Worker to increase participation of minority groups in social housing provision.
SENSE Scotland	£15,000 over 3 years (entering Year 2 of award)	Mar 08	To contribute towards the provision of personalised tenancy DVD's for people with multiple disabilities.

General Grants

General grants tend to be one-off grants to housing and/or community-related projects, up to, for a maximum of £5000.

Organisation	Grant	Date of Grant	Purpose
Scottish Christian Alliance	£2000 (£1000 per year for two years, entering year two)	March 2009	'Funky flats' self-made furnishings for and by homeless people
Bethany Christian Trust	£5000	June 2008	contribution towards core costs of furniture project
StreetLeague	£5000	June 2008	contribution towards the cost of provision of a modular educational career advice programme for homeless and disadvantaged youths
Starter Packs – Glasgow	£1250	June 2008	contribution towards the cost of employing a sessional worker for two months to provide information to housing associations
Ayrshire Initiatives	£2000	September 2008 (drawn down Jan 2009)	contribution towards the cost of increasing worker time to establish a befriending service in Ayrshire for homeless people to assist with tenancy sustainment
Lochaber Care & Repair	£5,000	September 2008	contribution towards the cost of the appointment of a freelance Occupational Therapist to help reduce the waiting list for Care and Repair services
Partners in Advocacy	£2,500	September 2008	contribution towards the cost of 'Your Choice: Your Voice Project' housing advice for people with learning disabilities
Wishaw and District Housing Association	£5,000 with an additional (£4,500 from Abbey Charitable Trust)	December 2008	contribution towards pilot project costs to extend time of fuel poverty empowerment project.
Fairbridge in Scotland	£3,000	March 2009	'Set About the Healthy Root' project- tenancy sustainment and Healthy Living Skills for homeless people

Our Money

Over the years, Lintel Trust has devised different ways in which to support its grant-giving programme. Alongside our ever-growing partnership arrangements with housing organisations and commercial companies linked to the housing sector, we run a very successful Events Programme, where people from all over the sector (and country!) take part in a variety of sporting events, with a view to raising money for the work of Lintel Trust. Our stalwart annual events include: tennis, golf, and five-a-side football, and we are very fortunate that many people who take part continue to do so over time.

Events

Date	Event	Sponsor	Amount raised (Approx)
Sept 08	Great Scottish Run	Queens Cross HA	£1000
	Charity 5-a-Side	Melville HA	£1500
Oct 08	Lintel Trust Annual Launch and Review	DTZ/Queens Cross HA /Link Group	n/a
Nov 08	Battle of the Bands	SFHA/Fairfield Housing Coop/ Cairn HA	£1000
Mar 09	Charity Tennis Tournament	HBJ Gateley Wareing	£1500
	Scottish Parliament Wine Reception	Dawn Group	n/a
Apr 09	Charity Race Night	Wates Scotland/ Martec Engineering/SFHA	£1000
June 09	Charity Golf Tournament	Dunedin Canmore HA, Fife HA, Castle Computer Services, and Cruden Group	£10,000
	Charity 5 A Side Football	Laidlaw Scott	£700

All of the money we raise from our variety of sporting events goes into our General Grant Fund, and is utilised by those projects requesting grant from us. You can see how much we have raised by holding our annual events in our financial summary at the end of our Review. Special thanks once more to all the people whose contribution to our events makes them so successful:

- Hunter Reid, Maryhill Burgh Halls (Tennis)
- Erika O'Brien and Neil Robinson, Civica UK Limited (Golf)
- Frank McCabe (Queen's Cross Housing Association), and, Laura Middell (Glasgow Association for Mental Health) (Glasgow 10k and Half-Marathon)
- Chris Farmer, Laidlaw Scott (Five a Side Football)
- Various SFHA staff (Race Night)

Money we spend

Financial Review, charitable expenditure, income and funding

Over the period 2008/09, Lintel Trust spent £49,150 in providing funding to projects. On the income side, £51,671 was received by way of donations, and £37,034 was received as a result of general fundraising, mainly through the Events Programme.

Restricted and Unrestricted reserves stood at £61,819 and £37,937 respectively as at 31st March 2009. The Trust aims to hold a minimum of unrestricted reserves amounting to £24,575 to cover 6 month's core costs. This will be retained in cash within a high-interest bank account. We are also holding a large donation under our Mainstreaming Equalities Programme, as we are actively seeking 'matched' funding to fund one project yet to be sourced.

For the period 2008/09, LintelTrust made a deficit of £15,228. For the period 2007/08, the surplus was £26,968.

Who Governs Us?

The Trust currently has 15 Trustees. Many of the existing Trustees have held office for over 10 years highlighting the level of commitment to the Trust. Our more recent Trustees have added their expertise to the breadth of knowledge held by our more established Trustees. All new Trustees have been provided with an induction pack, which includes the most current Annual Review; all leaflets and flyers current to LintelTrust; the last audited accounts, the current Budget and the most recent (quarterly) Management Accounts; copies of the last three Board Minutes and the Agenda for the next Board meeting (and a note of any future meeting dates); Code of Conduct; Board Policies; details of any Conflicts of Interest requirements; and details of the Board of Trustees and staff structures and reporting processes.

LintelTrust also operates Best Practice in having an Annual Self-Appraisal System for Trustees. LintelTrust also arranges an annual Strategic Planning Meeting, followed by subsequent appropriate meetings if necessary. A Trustee also has the option of going on specific, relevant training courses, dependent on funds held within LintelTrust's training budget. Trustees review risks to LintelTrust on an annual basis, and a suite of policies and procedures is provided to Trustees covering complaints, confidentiality, conflict of interest, data protection, employment, equal opportunities, health and safety, investments, public duty, reserves, retiral, resignation and disqualification, review of charitable purposes, risk management, staff recruitment, trustee duty of care, trustee induction, trustee liability, trustee personal remuneration, trustee recruitment, trustee register of interest, trustee role and duties, and trustee skills audit.

On a day-to-day basis, decisions are made by the Director. Where support is required, the Director can call upon the appointed Line Manager (the Convener). All major decisions on the operation of the Trust rest with the Board of Trustees.

Financial Summary

Income £		Expenditure £	
Voluntary Income	£51,671	Charitable Activities	£53,374
Activities for generating funds	£37,034	Cost of generating funds	£44,720
Investment Income	£2,157	Governance Costs	£7,996
Total	£90,862	Total	£106,090
Net movement in funds (£15,228)			
Full audited accounts are available on request			

Funders we thank

Funders who donated to LintelTrust from March 2008-March 2009 included:

- Dr Robert Mairs' Charitable Trust
- Darroch Charitable Trust
- Hugh Fraser Foundation
- James Wood Bequest Fund
- J and JR Wilson Trust
- Cruden Charitable Foundation
- Laidlaw Scott
- Link Group
- Scottish Government
- Miss Marion Broughton's Charitable Trust
- SFHA
- William Grant and Sons
- Abbey Charitable Trust
- Glasgow Housing Association
- NHBC (Scotland)

Our Board of Trustees comprise:

Robert McDowall, DTZ Consulting and Research (Convener); David Chalmers, Kingdom Housing Association (Vice-Convener); Neil Hall, Link Group (Treasurer); Sandra Smith, Abbeyfield; Andrew Robertson, Greater Glasgow & Clyde NHS Health Board, Isabel Moore, Lochalsh and Skye Housing Association; John Rogerson, Home Scotland, Shelter, Gordon Campbell, Nationwide Building Society; Alan West, Consultant; Eileen Shand, Eildon Housing Association; Brian Gegan, Cairn Housing Association; Jacqui Watt, Scottish Federation of Housing Associations; Kate Dewar, HBJ Gateley Wareing; Calum Macaulay, Albyn Housing Society; Arthur Cockburn, Prospect Community Housing.

Partners of LintelTrust:

Housing organisations and commercial companies can signify their support of the Trust by becoming Partners, which involves making an annual donation to the Trust over an initial three-year period (which can be ongoing). Partners' donations can go to areas and Programmes of their choice, and partners are named on Lintel Trust's headed paper and on the Lintel Trust website.

Partners during 2008/09 included:



Lintel Trust is also very grateful to a number of other organisations and individuals who have supported our work over 2008-09. Monetary support has come from a number of donations from housing associations and corporate bodies, (particularly in relation to supporting LintelTrust's Mainstreaming Equalities Programme); from events, (noted above), from the wallplanner, and from the Christmas Appeal.

By way of 'in-kind' support, particular thanks must go to Carol Bonham, from Link Group, who provides our accounting services, and to the Scottish Federation of Housing Associations (SFHA) for providing office space, telephone, internet, postage, and general support. Particular thanks must also go to Ian Wauchope and Geraldine Penglase of the SFHA for salary preparation.

LintelTrust ALSO wants to thank...



Link Group is again proud to sponsor LintelTrust's Annual Review
 Thanks to DTZ Consulting and Research, and Queens' Cross Housing Association for again sponsoring LintelTrust's Annual Launch



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