

Supporting upstream, community-led approaches to reducing inequalities in Scotland



Tackling Inequalities Fund Emerging Impact and Outcomes: Interim Report

June 2023 – March 2026

In partnership with Foundation Scotland



**WELLBEING
ECONOMY
ALLIANCE
SCOTLAND**



**Foundation
Scotland**

1. Executive Summary

The Tackling Inequalities Fund (TIF), was launched in May 2023 by Foundation Scotland. It provided long-term unrestricted funding of £500,000 over 3 years to six organisations across Scotland that were working to reduce inequalities through upstream, community-led interventions. WEAll Scotland plays a distinctive dual role in this programme: as a funded partner pursuing economic systems change, and as a learning partner supporting the cohort of funded organisations to adopt Wellbeing Economy principles and upstream approaches.

The first 'thematic' fund that Foundation Scotland had delivered, the aim was to provide organisations with the financial support to develop, test, implement or scale up activity that contributes to tackling and reducing inequalities either in their local areas or through their project more widely. This funding aimed to help groups go beyond dealing with the symptoms of inequality and contribute to reducing it at its root causes. The fund design and goal was to give agency to communities themselves to work in this 'upstream' way and help build an evidence base for what works and begin to challenge traditional systems.

"We wanted to develop a new fund to test local, community-led approaches to preventative, or 'upstream' solutions that tackle some of the barriers to equality. Alongside responding to immediate and vital demands, Foundation Scotland is increasingly adopting a developmental approach, allocating funding to groups working differently to create a fairer and more just Scotland. We'll be learning from the funded projects about their own approaches and what works well, which will help inform our own thinking in the future." - Helen Wray, Head of Philanthropy at Foundation Scotland¹

By 2025 it was clear that 3 years was simply not long enough to assess long term impact and a further award of £500,000 over 3 years was awarded to the participating organisations, which would enable much richer insight and learning than would be possible had the fund stopped at the original three-year point.

This report reviews the first 3 years of longitudinal qualitative data gathered through regular 'rapid reflections' from the funded cohort, using EasyRetro².

The funds' Learning Journey was designed to reduce the burden more traditional reporting demands place on funded organisations; instead of asking for formal key performance indicators, outcomes and annual reports, the aim was to capture how unrestricted funding allows organisations to change in response to the needs of their communities via:

¹[Foundation Scotland website News 11/10/2023](#)

²[EasyRetro](#): an online reflection platform

1. Monthly “rapid reflection” exercises
2. Quarterly online check in sessions
3. In person gatherings at mid- and end-points
4. Open communication ongoing amongst grantees and Foundation Scotland
5. Membership of WEAll Allies network, giving access to event, resources and collaboration opportunities
6. Working together to advocate for system level change

These activities helped inform Foundation Scotland’s Tackling Inequalities Fund – learning report, demonstrating the difference the funding is making across Scotland. The 10-minute ‘rapid reflections’ are designed to document the experiences of the organisations taking part, and capture the themes, lessons and successes as they emerge from this collaborative programme of work.

Based on three years’ of EasyRetro harvested data at this mid-way point of the journey, this self-reported journey captures how the Tackling Inequalities Fund has achieved significant outcomes across all six funded organisations, with WEAll Scotland’s facilitation role contributing to a shared learning culture, the adoption of upstream thinking, and a growing confidence among funded partners to pursue systemic change alongside direct service delivery.

This report is a review of WEAll Scotland’s role supporting Foundation Scotland’s inaugural Tackling Inequalities Fund and demonstrates the value of simple tools to capture stories, emerging themes and project impact. Tools that can be used regularly but are not time intensive. We hope it will also be of interest to other funders and policymakers who may be considering different approaches to tackling inequality, in line with Wellbeing Economy ideas - Purpose; Prevention; Pre-distribution and People-power.

The shifts we need in policy and practice

The four principles synthesise the macro-array of policy and practice shifts that need to come together, like corners of a jigsaw puzzle, to create a Wellbeing Economy.



In 2022 Foundation Scotland worked with the Wellbeing Economy Alliance (WEAll Scotland) to build a collective understanding of system change and evolve their practice of thinking and acting for the long term. They considered what it would mean for Foundation Scotland to put more emphasis on addressing the root causes of problems and investing in systems and practices where people can thrive. Focusing on 'Prevention', the project team developed an 'Upstream Mindset' Toolkit³ and the Tackling Inequalities Fund in 2024.

³[Applying the Upstream Mindset: A Toolkit](#)

2. Context and Approach

2.1 The Tackling Inequalities Fund

Foundation Scotland's Tackling Inequalities Fund was designed as a pilot to test whether unrestricted, multi-year funding could support community organisations to shift from reactive, crisis-driven service delivery towards preventative, upstream approaches that address the root causes of inequality. Six organisations were selected for the Fund, each working to tackle inequalities in different contexts and communities across Scotland.

2.2 WEAll Scotland's Role

WEAll Scotland occupies a unique position within the programme. As the only organisation in Scotland dedicated to connecting and expanding the wellbeing economy movement, WEAll brings expertise in systems thinking, upstream approaches and new economic models. Within the TIF programme, WEAll's contribution operates at three levels:

- **As a learning partner:** facilitating shared learning across the cohort through regular reflective sessions, knowledge sharing events and wellbeing economy framing
- **As a capacity builder:** helping funded organisations understand and adopt upstream approaches, using tools such as Foundation Scotland's Upstream Mindset Toolkit
- **As a grantee:** pursuing its own mission of economic systems change, policy advocacy and narrative shift

2.3 How We Captured Impact

This report is primarily informed by qualitative, longitudinal data gathered through 'rapid reflection': regular shared self-reporting online throughout the programme (June 2023 to March 2026). Spending ten minutes writing brief updates on celebrations, learnings, surprises and words of wisdom, and complemented by monthly themed questions, this largely replaces traditional annual or end of project reporting and supports good reflection and learning practice on an ongoing basis, creating a rich evidence base that tracks the journey of each organisation over time, as well as the collective journey of the group and the impact of the fund.

This qualitative approach aligns with the Fund's recognition that structural changes take time, that longer-term, consistent and proportionate monitoring and evaluation is essential, and that storytelling and community feedback should sit alongside traditional data collection methods.

2.4 Methodology and Analysis

The rapid reflections approach captures self-reported, subjective data, collecting information directly from individuals representing their organisations, asking them to reflect on their work and their experience. This has both strengths and weaknesses.

Strengths

- **High levels of participation and engagement:** Asking only ten minutes each month encourages participation and allows long term evaluation and captures emerging themes.
- **Efficiency and Cost-Effectiveness:** This method is simple, inexpensive and can quickly gather large amounts of data from diverse organisations.
- **Ease of Administration:** Standardised questions are familiar to participants and easy for researchers to distribute and analyse.
- **Shared Responses:** Builds camaraderie and shared understanding among the cohort, encouraging open reporting and collaboration.
- **Regularly Captures Events and Learning:** This avoids recall bias and memory decay; where participants may forget details or recall events over a period of time and not as they occurred.

Limitations

- **Social Desirability Bias:** Participants may consciously or unconsciously provide "correct" or socially acceptable answers to appear in a better light.
- **Introspective Ability:** Individuals may lack self-awareness or the ability to accurately assess their own perceptions or experiences.
- **Response Bias:** This includes tendencies to always pick the middle option (non-committal)
- **Unwieldy Data:** reporting subjectively can make data difficult to compare and contrast; participants can use different language to describe shared experiences or can give lengthy reports instead of succinct reflections.

The wealth of data collected over the past three years (43 pages from 2023 – 2026) has provided an opportunity to test new approaches to analysis and utilise AI tools to help with this. In this instance we used Anthropic AI to analyse the wealth of individual Rapid Responses and identify key themes emerging from these. These results were then double checked by both WEAll Scotland and Foundation Scotland project leads to ensure accuracy, and then matched against the WEAll Scotland theory of change.

3. Emerging Outcomes Against WEAll Scotland's Theory of Change

WEAll Scotland's [theory of change](#)⁴ identifies key steps towards economic systems change to deliver good lives for all on a healthy planet. The work of the Tackling Inequalities Fund and the six participating organisations contributes meaningfully to each of these, as demonstrated by the following emergent programme outcomes:

3.1 Increased Understanding and Support for the Wellbeing Economy Approach

Outcome 1.0: Through the programme, grantees have progressively deepened their understanding of what an upstream approach to tackling inequality using a Wellbeing Economy Framework⁵ means in practice. The EasyRetro data shows a clear trajectory from initial curiosity in 2023 to practical application by 2025–26. Early entries reflect excitement at discovering shared values across the cohort. By mid-programme, organisations were actively using upstream language and frameworks in their own planning.

“One of the basic premises of the funding was to look at upstream approaches which by definition says you can’t just come up with a solution that involves throwing money at it. It’s about creating resilience and community engagement.” – Gordon Rural Action

3.2 Creating Wellbeing Economy Advocates

Outcome 2.0: A striking outcome arising from the longitudinal data is the emergence of confident advocates for upstream and Wellbeing Economy approaches among organisations who would not previously have described their work in these terms. The programme Learning Journey has created advocates for upstream working – practitioners whose deepening understanding of root causes has led them to articulate systemic arguments.

The EasyRetro data captures this journey. Positive Changes Scotland's founder, initially focused on direct service delivery for women leaving the justice system, increasingly frames her work in terms of challenging structural inequities in housing, employment and the justice system itself. The October 2023 entry records her pushing doors that are now opening, and by 2025 she describes herself as a “social disruptor” doing things differently.

Gordon Rural Action's Upstream Advice Coordinator has been invited to high-level policy discussions with the Cabinet Secretary for Social Justice, bringing community insights to national conversations about poverty. This represents a direct pathway from local practice to policy influence, facilitated by the wellbeing economy framing that WEAll Scotland introduced to the programme.

⁴ See WEAll Scotland website detailing their Theory of Change – [What We Do](#)

⁵ See WEAll's “4 P's” for shifts policy and practice: Prevention; Purpose; People Powered and Pre-Distribution

3.3 Leaders Implementing a Culture of Change

Outcome 3.0: The EasyRetro data reveals significant leadership development across the cohort. The unrestricted funding model has given organisational leaders the space and permission to think strategically rather than reactively.

Positive Changes used TIF funding to recruit an Operations Manager, freeing the CEO to focus on strategic development including the ambitious goal of purchasing accommodation for women leaving prison. Showcase the Street leveraged the flexibility to pivot its tech education programmes in response to community needs, winning the Dundee Social Enterprise Network's Innovation Award. Kingdom Off Road Motorcycle Club's leadership journey is documented through the EasyRetro data, showing a progression from operational management to strategic thinking about scaling, sustainability and policy influence.

"Founders and CEOs need to work on their vision, not in it." – Kingdom Off Road Motorcycle Club

3.4 Shift Towards Wellbeing Economy Decision-Making

Outcome 4.0: Perhaps the most significant systemic outcome is the shift in how funded organisations make decisions about resource allocation. The EasyRetro data shows that organisations have moved from output-focused thinking to considering long-term, preventative impact.

"Social investment is required for scale and growth. Many social entrepreneurs are caught in a stagnant circle of local delivery ie working on the coal face. Appropriate levels of funding enables project analysis, growth and greater social impact." –Kingdom Off Road Motorcycle Club

Gordon Rural Action is now exploring community-led projects such as a Men's Shed and youth club café designed to be self-sufficient with minimal ongoing funding. Networks of Wellbeing's outreach model delivers services where people are rather than expecting them to travel. The collaborative food outreach project between Gordon Rural Action and partner organisations is reaching over 90 people fortnightly in rural communities, with uptake from demographics not originally anticipated.

WEAll Scotland's direct policy work has progressed in parallel. The organisation has completed wellbeing budgeting projects with Perth and Kinross Council, contributed to parliamentary consultations on the Community Wealth Building Bill and Land Reform, and co-created a 2026 election manifesto with over 40 member organisations.

4. Emerging Themes

4.1 The Transformative Value of Unrestricted Funding

The single most consistent theme across the EasyRetro responses from the participating funded organisations is the transformative impact of unrestricted, multi-year funding. This is not a general observation about flexible funding; the longitudinal data shows specifically how it enabled outcomes that restricted funding could not.

Organisations describe being freed from the constraints of predefined outcomes, having the ability to respond to emerging community needs, and having space to reflect and learn before acting. February 2024 entries specifically address this theme, with Showcase the Street noting that the freedom to change approach mid-project has been hugely beneficial. Gordon Rural Action's coordinator describes the ability to spend time building networks and relationships with community members who are often excluded from decision-making as invaluable.

"When you start a project, you have an idea in mind; however, as you begin to engage with your target audience, the freedom to change your approach is hugely beneficial to get the best outcomes." – Showcase the Street

4.2 The Journey Towards Upstream Thinking

The EasyRetro data maps a clear progression from downstream crisis response to upstream prevention. This shift did not happen overnight, and the data captures the challenges and breakthroughs along the way.

"We've been going for over 40 years helping to alleviate poverty, and competition, for funding and resources, and the need for services is as much, if not more, than it's ever been. More of what we do is not a long-term solution. Preventative, empowering, "Upstream" approaches looks to be the way forward." - Gordon Rural Action

Early entries (2023) show organisations grappling with the concept of upstream approaches. By mid-2024, several organisations had conducted service audits and were actively redesigning programmes to reflect upstream thinking. By 2025–26, upstream working has become increasingly embedded in organisational culture, with the March 2026 entry from Gordon Rural Action recommending that organisations revisit the Upstream Toolkit regularly to check their projects are evolving.

The November 2024 themed question on preventative approaches reveals how deeply this thinking has taken root. Kingdom Off Road describes high-adrenaline activities for risk-taking young people as an addiction replacement strategy. Showcase the Street frames tech skills development as a preventative approach to economic exclusion. Networks of Wellbeing describes supporting someone through recovery to the point where they can support others, creating a sustainable cycle of community care.

4.3 Partnership and Collaboration

Partnership working emerges as both one of the greatest successes and greatest challenges of the programme. The data shows rich evidence of collaboration developing over time, while also capturing the honest difficulties of building meaningful partnerships. The Huntly partnership between Gordon Rural Action and Networks of Wellbeing is particularly well-documented. Initially suggested by Foundation Scotland rather than self-initiated, the organisations describe the challenges of aligning different working styles and expectations without adequate set-up time. However, by 2025 the partnership had yielded significant benefits: joint outreach in new communities and collaborative work supporting the Just Transition agenda with a recommendation for Huntly as a Universal Basic Income pilot.

“What the partnership has done, in some ways, is bring other organisations into partnership with us as well. And we can signpost other organisations to each other for specific projects.” – Gordon Rural Action

Across the wider cohort, partnerships with external organisations expanded significantly. Showcase the Street has developed collaborations with Abertay University, Dundee and Angus College, local schools and the ADHD support charity. Kingdom Off Road works with police, social work, education and community development services through the Improving Levenmouth Together initiative, contributing to an 80% reduction in anti-social behaviour calls about illegal off-road riding in the area.

4.4 Community Voice and Lived Experience

A consistent thread through the EasyRetro data is the growing centrality of community voice and lived experience in organisational decision-making. This aligns directly with WEAll Scotland’s ‘People Power’ principle and its theory of change outcome around rooting Wellbeing Economy understanding in lived experience.

Positive Changes centres the experiences of women who have touched the justice system, including one participant’s journey from losing her home and children to gaining employment, a diploma and reunification with her family, demonstrating the power of this approach. Networks of Wellbeing’s peer support model sees people in recovery from mental health challenges leading support groups for others, bridging critical service gaps.

Gordon Rural Action created a Youth Panel to inform and direct funding applications, ensuring younger voices help shape local spending decisions. The October 2024 EasyRetro captures the learning that young people are interested and willing to get involved if it is led by them rather than imposed by older generations.

4.5 Resilience, Adaptation and Honest Reflection

The EasyRetro format creates a uniquely honest picture of organisational life over time. The data captures not just successes but setbacks, surprises and moments of vulnerability. This honesty is itself an outcome of the programme's design: the unrestricted funding model and the collaborative learning approach modelled by WEAll Scotland created conditions where organisations felt safe to share challenges.

The data includes entries about failed funding applications, staff illness, the difficulty of succession planning, the challenge of managing volunteer teams, and the emotional toll of supporting people in crisis. Networks of Wellbeing's September 2025 entry reveals that since January 2025 they have supported over 70 people with suicidal ideation, a stark indicator of the scale of need in rural communities.

"Increased demand on our service has had a big impact on staff wellbeing. We are taking the time to look at how we can support our staff in the best way possible." – Networks of Wellbeing

This honest engagement with challenge is itself a demonstration of the trust and collective resilience built through the programme.

5. Impact Across the Cohort

The following snapshots draw on both the EasyRetro longitudinal data and the Foundation Scotland interim report case studies to illustrate the breadth of impact across all six funded organisations.

Kingdom Off Road Motorcycle Club (Fife)

Structured off-road motorcycling programmes for at-risk young people have contributed to an 80% reduction in anti-social behaviour calls in Levenmouth. Young people have gained qualifications, volunteering experience and pathways to employment. The club has expanded from one to multiple staff members, secured additional funding from multiple sources, hosted national competitions, and been nominated for National Youth Work Awards. Through the EasyRetro process, the organisation has reframed its entire ethos as upstream and preventative.

Positive Changes Scotland (Stirling/Scotland-wide)

Through the Grace Chocolates programme, women leaving the justice system have gained workplace skills, qualifications and a supportive community. The TIF funding enabled recruitment of an Operations Manager, freeing strategic capacity. The organisation has been exploring purchasing accommodation for women. A new retail space has opened, and corporate clients now include the Scottish BAFTAs.

Showcase the Street (Dundee)

Technology-focused education and employment pathways have expanded to reach young people from multiple schools across Dundee and beyond. Programmes include Girls in Gaming, ADHD-specific tech sessions, and after-school clubs with consistent high attendance. The organisation won the Scottish Social Enterprise Network's Innovation Award for tech for good and is developing replicable delivery models, including new rural outreach and stroke rehabilitation partnerships.

Gordon Rural Action (Aberdeenshire)

The Upstream Advice Coordinator role has catalysed a fundamental reappraisal of services. A community support hub now offers a financial advice service, a Bikery, charity shop, Baby Bank, Uniform Exchange, outreach and befriending services. Over £1.1 million in client financial gain was generated between January and August 2024 alone. The organisation has been invited to high-level poverty policy discussions and is collaborating on a rural food outreach project reaching over 90 people fortnightly.

Networks of Wellbeing (Aberdeenshire)

Community-based mental health services have expanded through outreach into schools, peer support groups and multi-generational programmes. The organisation has developed a Women's Group in Keith that has become self-sustaining and community-led, and launched Bereavement Cafés filling a gap identified by local GPs and funeral services. New partnerships enable more holistic support, while Foundation Scotland's unrestricted funding model has enabled responsive service development.

WEAll Scotland (Scotland-wide)

The TIF funding has supported WEAll Scotland's core work. The Operations Lead role, for example, is funded through TIF and has significantly increased organisational capacity, enabling expanded programme delivery and policy influence and drawing in additional funding. Completed influencing and policy work include wellbeing budgeting work in Perth and Kinross; Transport and Employability policy framed through a Wellbeing Economy lens in Clackmannanshire; the co-creation of a 2026 election manifesto with over 40 organisations; running a regular cross-party parliamentary group; contributions to multiple parliamentary bills.

6. Connecting to WEAll Scotland's Wider Mission

The Foundation Scotland's Tackling Inequalities Fund (TIF) aligns closely with WEAll Scotland's three strategic goals: **changing the narrative** around the purpose of the economy; **amplifying and advocating** for policies that put wellbeing first; and **collaborating** across sectors and communities, and was developed in close collaboration with Foundation Scotland, who were working to re align their own strategic aims to give more focus on upstream interventions through the 'Raising Our Gaze' report and toolkit. This work led directly to the design of the Tackling Inequalities Fund and was recently showcased at an international funder's conference in Copenhagen, Denmark.

The TIF demonstrates WEAll's distinctive approach of working as a connector and catalyst, adding value to others' work rather than duplicating it. Through TIF, WEAll has helped five very different community organisations connect their practical, grassroots work to the broader case for economic systems change. The learning generated through this programme now feeds directly into WEAll's policy advocacy, its capacity building offer to local authorities and public bodies, and its evidence base for the Wellbeing Economy approach.

The programme also demonstrates the journey that WEAll Scotland takes partners on, from theory to practice to transformation. Funded organisations who before the programme had been primarily focused on immediate service delivery are now engaging with policy discussions, advocating for systemic change, and embedding participatory decision-making into their organisations. This is the Tackling Inequality Fund in action.

7. Lessons and Recommendations

7.1 What Works

- **Unrestricted, multi-year funding** is essential for enabling the shift from reactive to preventative work. It gives organisations the autonomy and time to understand community needs before designing solutions.
- **Cohort-based learning** through regular reflective sessions builds trust, enables honest sharing of challenges, and accelerates the adoption of new approaches.
- **Wellbeing Economy framing** gives organisations a language and framework to connect their local work to systemic change, deepening their sense of purpose and strategic direction.
- **Longitudinal qualitative data** captures the nuance and complexity of systems change work in ways that quantitative metrics alone cannot.
- **Community voice and lived experience** must be at the centre of service design and delivery for interventions to be relevant, sustainable and empowering.

7.2 What Could Be Developed Further

- **Partnership development** requires dedicated time and resources. Where partnerships are suggested by funders, adequate set-up time, facilitation support and clear frameworks should be provided from the outset.
- **Staff wellbeing** must be actively supported as organisations take on increasingly complex work with vulnerable communities. The data reveals growing pressure on frontline staff, particularly in mental health services.
- **Impact measurement for upstream work** remains challenging. The programme would benefit from further development of shared indicators and storytelling approaches that capture systems-level change. This is now being addressed through additional FS support on the development of community indicators, led by WEAll Scotland.
- **Balancing urgent need with strategic change** remains a live tension for all organisations. Continued support for this balancing act, through peer learning and reflective practice, is essential.

8. Conclusion

The Tackling Inequalities Fund has demonstrated that when community organisations are given the trust, flexibility and framing to pursue long-term, preventative approaches to inequality, significant and measurable outcomes follow. WEAll Scotland's role as learning partner, capacity builder and Wellbeing Economy advocate has been central to this process, helping to create a cohort of organisations that are not only delivering better services but are increasingly confident in articulating and pursuing systemic change.

The longitudinal qualitative data gathered as part of the Learning Journey, through the EasyRetro process, is itself a significant methodological contribution, showing how regular, structured reflection can generate a rich evidence base for complex, long-term programmes. The themes that emerge – the transformative power of unrestricted funding, the slow but tangible shift towards upstream thinking, the importance of honest peer learning, and the growing confidence of community practitioners as advocates for change – offer valuable insights for funders, policymakers and the wider Wellbeing Economy movement.

Following the Scottish Parliamentary elections, the learning from this programme reinforces the case for a Wellbeing Economy approach: one that prioritises prevention over crisis response, invests in community capacity and lived experience, and recognises that tackling inequality requires changing the economic rules that produce it. WEAll Scotland remains committed to ensuring this learning is shared, amplified and translated into lasting policy and practice change., including advocating for more funders to embrace upstream and systems change thinking in their strategies.