

MARK WILLIAMS FOUNDATION

Scottish Charitable Incorporated Organisation (SCIO)

Scottish Charity Number: SC054415

TRUSTEE ANNUAL REPORT

For the period 21 July 2025 – 31 March 2026

Registered Office:

EH20 Business Centre

6 Dryden Road

Loanhead

EH20 5LZ

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1. Introduction

The trustees present their report and the unaudited financial statements of the charity for the period **21 July 2025 to 31 March 2026**.

2. Accounting Period

This report covers a shortened accounting period, as this is the charity's first year of operation. The Mark Williams Foundation was registered as a Scottish Charitable Incorporated Organisation (SCIO) on 21 July 2025, and the trustees have adopted an annual accounting period of 1 April to 31 March.

Accordingly, this first reporting period runs from 21 July 2025 to 31 March 2026. All future accounting periods will follow the standard 12-month cycle from 1 April to 31 March.

3. Reference and Administrative Details

Charity name: Mark Williams Foundation **Charity number:** SC054415

Legal form: Scottish Charitable Incorporated Organisation (SCIO)

Date of registration: 21 July 2025

Principal office: EH20 Business Centre, 6 Dryden Road, Loanhead, EH20 5LZ

Charity Trustees during the period:

- Nicola Williams
- Craig Williams
- Elizabeth McAdam

Senior staff:

- Sarah Peacock – Executive Director

4. Structure, Governance and Management

The Mark Williams Foundation is a SCIO governed by its constitution. The trustees are responsible for strategic direction, governance oversight, and ensuring compliance with the Charities and Trustee Investment (Scotland) Act 2005.

The charity worked with volunteers and professional partners including Johnson Legal and the EY Foundation, alongside volunteers supporting fundraising, marketing, programme delivery and treasury functions.

The trustees maintain oversight of safeguarding arrangements and ensure that employees, volunteers and partners operate in line with appropriate safeguarding standards.

5. Charitable Purposes and Public Benefit

The SCIO's purposes are:

- (i) provide support to fathers who are at risk of losing access to their children due to financial hardship, distress, family breakdown, safeguarding concerns, or related disadvantage, including mental health support, emotional wellbeing assistance, and crisis signposting;
- (ii) provide volunteer-led emotional support, guidance, practical assistance, mental health first response, and signposting to fathers and families experiencing distress, isolation, or difficulty accessing appropriate support services;
- (iii) and the advancement of education by enhancing training and expanding education to develop skills and knowledge in entrepreneurship, leadership, and business through the provision of mentorship programmes.

The trustees approved an amendment to the SCIO's charitable purposes on 21 May 2026, adding purpose (ii) relating to the strengthening of family wellbeing. This change did not materially affect activities delivered between July 2025 and March 2026, but it will shape programme development in future periods.

The trustees confirm that all activities carried out during the reporting period delivered clear and measurable public benefit, in line with OSCR's public benefit guidance.

Our work provides public benefit in the following ways:

- **Reducing hardship and inequality** by offering practical and financial support to fathers who would otherwise be unable to maintain stable relationships with their children.
- **Strengthening family wellbeing** by helping fathers remain active, positive participants in their children's lives, which contributes to improved outcomes for children and communities.
- **Improving economic participation** through education, mentoring, and skills programmes that increase employability, confidence, and long-term financial stability.
- **Creating accessible support pathways** that are open to individuals regardless of background, ensuring that those most at risk of social exclusion can access help.
- **Building community capacity** by training volunteers, developing peer-support networks, and encouraging positive role modelling.

Our Values

- **Integrity** - Trust is the foundation of every future we build.
- **Resilience** - Strong for the journey. Stronger for the cause.
- **Compassion** - Real change starts with real care.
- **Empowerment** - Equipping every person to lead their own story.
- **Opportunity** - Turning potential into possibility, and possibility into progress.

These values apply to all of us, Trustees, volunteers, staff and beneficiaries and are an integral part of our induction and training, our communication and every decision we make.

6. Activities and Achievements

6.1 Launch and Early Development

The Foundation held its official launch event on 25 September 2025, raising over £100,000 to support the design and delivery of its inaugural programmes and to build awareness of its mission.

6.2 Legal Support Initiative

The Legal Support Initiative, delivered in partnership with Johnson Legal Family Law, provided vital assistance to fathers navigating complex and often overwhelming legal processes. Many of the individuals seeking help were experiencing significant distress, financial hardship, or barriers to accessing professional advice. The initiative ensured that fathers who would otherwise be unable to afford legal support were given clear guidance, structured assistance, and compassionate advocacy.

During the reporting period, two fathers received direct support through this initiative. Both cases involved urgent and emotionally challenging circumstances, where fathers were at risk of losing meaningful contact with their children. The Foundation provided practical assistance, support, and access to specialist legal expertise.

One father achieved a positive and life-changing outcome, securing Christmas contact with his child after a prolonged period of separation. This result not only strengthened the father–child relationship but also contributed to improved wellbeing for the wider family. The second father received early-stage guidance that helped stabilise his situation, clarify his legal options, and reduce the immediate distress associated with navigating the family court system alone.

The impact of this initiative extended beyond the individual cases. Fathers reported feeling more confident, more informed, and less isolated, with several noting that the Foundation's support was the first time they felt genuinely listened to and understood. The partnership with Johnson Legal Family Law has established a strong foundation for expanding this service in future years, enabling more fathers to access the support they need to remain active, positive participants in their children's lives.

6.3 Entrepreneurship Apprenticeship Programme

In partnership with the EY Foundation, the Foundation launched its first Entrepreneurship Apprenticeship Programme, creating five mentor–mentee pairings between experienced business leaders and young people facing barriers to opportunity. This programme was designed to build confidence, develop employability skills, and open pathways into entrepreneurship for young people who may not otherwise have access to such networks.

Participants benefited from:

- **Boardroom experience**, giving them first-hand insight into leadership, decision-making, and organisational strategy
- **Work placements**, enabling them to gain practical skills, workplace confidence, and exposure to professional environments
- **Investment projects**, where young people developed business ideas, pitched to mentors, and learned how to turn concepts into viable ventures
- **Personal development support**, including coaching, goal-setting, and resilience-building

Feedback from participants and mentors highlighted significant positive impact. Young people reported increased confidence, aspiration, and self-belief, with several noting that the programme helped them see entrepreneurship as a realistic future pathway. Mentors observed marked growth in communication skills, problem-solving, and professional readiness. The programme has laid strong foundations for a scalable model that can be replicated in future years.

6.4 Fundraising and Awareness

Activities included:

- Official Launch event
- Cold Water Dip Challenge
- easyfundraising partnership
- Cards for a Cause
- Foundation merchandise
- Social media and brand development

All activities delivered during the period directly supported the SCIO's charitable purposes, with the Legal Support Initiative advancing purpose (i), the Wellbeing & Support for Fathers & Families initiative advancing purpose (ii), and the Entrepreneurship Apprenticeship Programme advancing purpose (iii).

7. Financial Review

- **Total income:** £167,477
- **Total expenditure:** £80,459
- **Movement in funds:** £87019
- **Reserves at 31 March 2026:** £87019 (all unrestricted)

The charity's first year of operation was defined by strong momentum, exceptional community support, and a highly successful launch event that provided the financial foundation for the Foundations initial programme delivery. The launch event generated the vast majority of first-year income and enabled the Foundation to establish core activities, build partnerships, and demonstrate meaningful early impact.

Income and Expenditure

During the period, the Foundation received total income of £167,477, primarily from launch-event fundraising, early donations, and initial supporter engagement. Total expenditure amounted to £80,459, reflecting investment in programme design, launch and development, volunteer training, operational infrastructure, and delivery of the Legal Support Initiative, Wellbeing & Support activities, and the Entrepreneurship Apprenticeship Programme.

This resulted in a movement in funds of £87,019, all of which remains unrestricted. Accordingly, unrestricted reserves at 31 March 2026 stand at £87,019. These reserves provide a vital platform for stability as the charity transitions from its launch phase into a more predictable and diversified funding model.

Financial Position and Sustainability

The trustees recognise that the charity's first-year financial performance was significantly supported by one major fundraising event. While this provided an exceptional starting point, long-term sustainability requires a more balanced and repeatable income structure. The current reserves position allows the Foundation to plan responsibly, invest in programme growth, and manage risk while developing this broader funding base.

8. Reserves Policy

As a newly established charity, the Foundation intends to build reserves that support operational stability and continuity of services. A formal reserves policy will be developed as income streams mature.

9. Risk Management

Key risks identified include:

- Dependence on fundraising income
- Reliance on external partners
- Volunteer capacity
- Reputational and safeguarding risks

These are managed through governance oversight, partnership agreements, and volunteer support structures.

10. Plans for Future Periods

In 2026/27, the Foundation plans to:

- Solidify portable Entrepreneur Apprenticeship Programme model in Edinburgh
- Build a clear pipeline of fathers we can support
- Support ten fathers through the Legal Support Initiative
- Recruit ten young entrepreneurs and fifteen mentors
- Strengthening awareness and communications
- Recruit and train additional volunteers to work 20 hours a week on tasks directly related to beneficiary impact

Financial targets:

- £126,000 through grants and donations
- £26,000 in regular giving
- £15,000 through peer-to-peer fundraising

11. Trustees' Responsibilities

The trustees are responsible for preparing the Trustees' Annual Report and financial statements and ensuring they give a fair and balanced account of the charity's activities and financial position.

Approved by the trustees on: 26/8/26

Signed on behalf of the Board:

Name: Nicola Williams

Position: 8/9/26

12. Independent Examiner's Report

Independent Examiner's Report to the Trustees of the Mark Williams Foundation

I report on the accounts of the charity for the period **21 July 2025 to 31 March 2026**, which comprise the Receipts and Payments Account, Statement of Balances, and related notes.

Respective Responsibilities of Trustees and Examiner

The charity's trustees are responsible for the preparation of the accounts in accordance with the Charities and Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended).

I am appointed to examine the accounts under section 44(1)(c) of the 2005 Act.

Basis of Independent Examiner's Statement

My examination is carried out in accordance with Regulation 11 of the 2006 Regulations. It does not provide the same level of assurance as an audit.

Independent Examiner's Statement

In the course of my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that the requirements to keep accounting records and prepare compliant accounts have not been met; or
2. to which, in my opinion, attention should be drawn to enable a proper understanding of the accounts.

Independent Examiner:

Name: ___Craig Coyle_____

Professional designation (if any): ___CA_____

Address: ___38 Woodbank Crescent, Clarkston G76 7DR_____

Date: ___11/9/2026_____