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| 1. **Financial**
2. intandem project income and expenditure: -

*Please input the ‘Actual’ expenditure, with expenditure in the third month of this quarter based on best available estimate.*

|  |  |
| --- | --- |
| Total Inspiring Scotland Investment to date | £ |

|  |  |  |
| --- | --- | --- |
|  | Planned | Actual |
| Spend current financial year to date (2018/19) | £ | £ |
| Balance at end of last quarter | £ |
| Spend current quarter  | £ | £ |
| Forecast balance at end of quarter  | £ |

*Please provide an explanation for any variances*Reasons for any variances were:-1. Organisational income and expenditure: -

|  |  |  |
| --- | --- | --- |
|  | Planned | Actual |
| Organisational Income Year to Date | £ | £ |
| Organisational Expenditure Year to Date | £ | £ |

*Please provide an explanation for any variances*Reasons for any variances were:- 1. Cover (free reserves as multiple of monthly operating costs):

*Please provide the following information** Latest reserves position is
* Based on your monthly operational costs, this creates cover of
 |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| 1. **Project Outputs: Milestones**
2. Milestones delivered versus plan for the quarter

*Please add your commentary on the milestones for the quarter i.e. achieved or, if not achieved, reasons for this etc.*

|  |  |  |
| --- | --- | --- |
| **Milestone** | **By date** | **Achieved/Comments** |
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 |
| **Project Outputs: Staff** 1. Project staff and management input: actual vs plan for intandem.

*Please confirm volunteer co-ordinator in role for the full quarter or explain if otherwise. Please also describe any significant management or other time inputs to the intandem service.*  |
| **Project Outputs: Monitoring data** 1. Mentors: actual vs plan.

*Please input your projected numbers to the end of this quarter (end of March) and provide new planned numbers for the next quarter. All cells in yellow require to be filled.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Mentors** | **Recruited** | **Trained/selected** | **Matched/Available** |
| **Plan** | **Actual** | **Plan** | **Actual** | **Actual** |
|  | *New* | Cum. | *New* | Cum. | *New* | Cum. | *New* | Cum. | *New* | Total |
| Mar 17 |  |  |  |  |  |  |  |  |  |  |
| Jun 17 |  |  |  |  |  |  |  |  |  |  |
| Sep 17 |  |  |  |  |  |  |  |  |  |  |
| Dec 17 |  |  |  |  |  |  |  |  |  |  |
| Mar 18 |  |  |  |  |  |  |  |  |  |  |
| Jun 18 |  |  |  |  |  |  |  |  |  |  |
| Sep 18 |  |  |  |  |  |  |  |  |  |  |

*Add any explanatory text here describing variances etc.*1. Mentees: actual v plan

*Please input your projected numbers to the end of this quarter (end of March) and provide new planned numbers for the next quarter. All cells in yellow require to be filled.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Mentees** | **Referred** | **Matched** | **Live****Matches** | **No. of mentor/mentee meetings** |
|  | **Plan** | **Actual** | **Plan** | **Actual** | **Actual** | **Actual** |
|  | *New* | Cum. | *New* | Cum. | *New* | Cum. | *New* | Cum. | *New* | Total | *New* | Cum. |
| Mar 17 |  |  |  |  |  |  |  |  |  |  |  |  |
| Jun 17 |  |  |  |  |  |  |  |  |  |  |  |  |
| Sep 17 |  |  |  |  |  |  |  |  |  |  |  |  |
| Dec 17 |  |  |  |  |  |  |  |  |  |  |  |  |
| Mar 18 |  |  |  |  |  |  |  |  |  |  |  |  |
| Jun 18 |  |  |  |  |  |  |  |  |  |  |  |  |
| Sep 18 |  |  |  |  |  |  |  |  |  |  |  |  |

*Add any explanatory text here describing variances etc. and please state when capacity will be reached.* For current live matches, please provide the breakdown of live matches by local authority:* Local authority 1
* Local authority 2
* Local authority 3
* Local authority 4
1. Ineligible Referrals, Referrals Not Taken Forward (NEW), Match Endings in the Quarter and Analysis of Mentors (NEW)

|  |  |  |
| --- | --- | --- |
| **Ineligible Referrals** | **Number** | **Reasons** |
| Jun 17 |  |  |
| Sep 17 |  |  |
| Dec 17 |  |  |
| Mar 18 |  |  |
| Jun 18 |  |  |
| Sep 18 |  |  |

|  |  |  |
| --- | --- | --- |
| **Referrals****Not Taken Forward** | **Number** | **Reasons (e.g. child decides not to proceed, family obstruction, family disengagement etc.)** |
| Jun 18 |  |  |
| Sep 18 |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Endings** | **Number****Planned** | **Number****Unplanned** | **Length of match** | **Reasons for ending, and current status (eg re-match/new mentor sought etc)** |
| Jun 17 |  |  |  |  |
| Sep 17 |  |  |  |  |
| Dec 17 |  |  |  |  |
| Mar 18 |  |  |  |  |
| Jun 18 |  |  |  |  |
| Sep 18 |  |  |  |  |

For the mentors who are currently in a live match or available to be matched, please provide the following breakdown:Gender: * Number of women:
* Number of men:

Age profile: * Number aged under 25:
* Number aged 25 – 34:
* Number aged 35 – 44:
* Number aged 45 – 54:
* Number aged 55 – 64:
* Number aged 65 and over:

Employment status: * Number in permanent full time employment:
* Number in permanent part-time employment:
* Number in temporary employment:
* Number unemployed:
* Number retired:
* Number of students:
1. Other activities and outputs

*Please include a description of volunteer recruitment activities undertaken, contacts with referring agencies, progress to agreeing referral forms and pathways, any activities or events provided for trained mentors and other waiting list activities; any activities for mentees, activity days etc.* |
| 1. **Social Impact (Project Outcomes)**

**Outcomes:**The charity is gathering baseline data in line with the evaluation methods and indicators of impact agreed with Inspiring Scotland. The core outcomes are:• Increased confidence • Improved self-esteem• Improved social relationships• Reduced social isolation• More engaged with the local communityThere is also a requirement to gather data around school participation and performance, and to record goals set and achieved. This to be agreed at a future date.*Please state the numbers of mentees for whom baseline data has been gathered on Viewpoint, and describe any interesting information arising from this.**Please record here any impacts measured to date.**Please provide an update on the subjects of your two case studies – either in this report or as appendices.* |
| **D. Organisational Development -** *Please describe here any organisational development activities undertaken with the support of Inspiring Scotland e.g. capacity building, training, accreditation, leadership & governance, public profile, operational issues (beyond intandem service), planning, financial, fund raising.* |
| 1. **Milestones**

**Milestones agreed for next quarter – to end Sept 2018***Please add any milestones describing significant activities/achievements expected in the next quarter.*

|  |  |  |
| --- | --- | --- |
| **Milestone** | **Date** | **Comments** |
| To achieve the planned numbers for mentors and mentees as in tables above. | End Sep |  |
|  |  |  |
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**Milestones for rest of year (to March 2019)***Please add any milestones describing significant activities/achievements expected next year.*

|  |  |  |
| --- | --- | --- |
| **Milestone** | **Date** | **Comments** |
| To achieve the planned numbers for mentors and mentees as in tables above. | Quarterly to Mar 19 |  |
|  |  |  |
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| **Summary***To be completed by Performance Advisor* |

|  |
| --- |
| **For Inspiring Scotland Use:**Planned spend for forthcoming quarter £xx,xxx**PA Recommendation**It is recommended that payment of **£z** is made to fund activities to the end of September 2018.  |
|

|  |  |
| --- | --- |
| **Original budget** for 2018/19 | £ |
| **Current budget** for 2018/19 | £ |

 |

Signed (PA) Signed (Head of Funds)

Date Date