



## **Guidance on the Information for the intandem Quarterly Review**

**March 2017**

### **Introduction**

The Quarterly Review presents, through a balanced scorecard, the position of your charity and the intandem service you are delivering. The review takes place in the third month of each quarter and covers the following four areas:

- Finances
- Project Outputs (activities)
- Social Impact (Project Outcomes)
- Organisational Development.

The timing is set so that your Performance Advisor (PA) can recommend your funding for the next quarter, with the funds available to you in the last week of the quarter (or sometimes early in the first month in the next quarter).

In order to achieve these timescales, your PA will have to present a recommendation for funding five business days before the end of the month. Each quarter, your PA will agree with you the date by which we need to receive your data, and a date for a formal quarterly review meeting. As stated in the Partnering Agreement, we expect to have your data by the end of the first full week in third month. This is 10<sup>th</sup> March in the current quarter but your PA might agree a different date with you.

Your PA will be responsible for preparing the quarterly review report that Inspiring Scotland uses to authorise your payments, but is reliant on you to provide them with the necessary information. You have probably seen a copy of the quarterly review report template. Unless you have a different agreement with your PA, you can provide the information described below in a format that works best for yourselves.

### **Financial Information**

The following financial information is required:

- Your budget spreadsheet, with the actual spends for November 2016 to February 2017, and as accurate an estimate of the spend in March 2017 as possible.
- An explanation of any material variances between budget and actual spend.



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- Your charity's organisational income and expenditure for November 2016 to February 2017 (or the most recent month end as per your management accounts).
- An explanation of any significant variances from budgeted income and expenditure, such as new grants awarded or unexpected facilities expenses.
- Your charity's cover position at the end of February. Your cover is an expression of your unrestricted and non-designated reserves as a proportion of your on-going operational costs.

This is the first quarterly report, and takes us to the end of the financial year. Normally, we will record in the report the intandem budget vs. actual on a year to date basis as well. This is easily extracted from the budget spreadsheet.

As this quarterly report is in the last quarter of the financial year, you will need to prepare ahead of the quarterly review meeting and agree with your PA at the meeting an intandem budget for 2017-18. A template for this is being prepared and will be provided as soon as available.

### **Project Outputs**

This is where we monitor the activities undertaken by the intandem service. We also include the achievement of any milestones agreed with your PA for delivery during the quarter.

The following monitoring information is required:

- A list of the milestones agreed at the previous quarterly review, and the progress against these.
- As this is the first quarterly review, the milestones should be taken from your original operational plan, and will be achievements such as when your volunteer co-ordinator was in place, when you started training volunteer mentors etc. Please agree these with your PA in advance.

All of the following are to be presented as actual figures against plan. Apart from the first of these, they are to be given for the period November 2106 to end February 2017.

- The number of staff working for the intandem service, and the number of staff working for the organisation as a whole. This is as at end February. (For national charities, you may agree an alternative to the full charity's staff numbers e.g. staff numbers in your local region.)



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- The number of volunteer recruitment events held.
- The number of meetings held with referring agencies.
- The number of mentors recruited, starting training, successfully finishing training, and matched.
- The number of referrals received, young people contacted to offer a mentor, and matched.

You should provide a description of the following:

- Volunteer recruitment activities undertaken, including your advertising/marketing and any specific contacts made with e.g. colleges, corporate parents, local employers.
- Your contacts with potential referring agencies and progress to agreeing referral pathways.
- Any activities/events provided for trained mentors and/or referred young people.

### **Social Impact (Project Outcomes)**

Evaluation of the impact that the service is having is essential to ensuring its effectiveness, and to confirming the value of mentoring as a means of support for our vulnerable young people.

As this is the first quarterly report, only a few charities will have matched mentees with mentors and fewer will have managed to capture any baseline data.

In this quarter, therefore, the only information required in this section will be the number of young people for whom any form of baseline data has been received. Please also describe the baseline data collected, and its source (e.g. if baseline data is captured on the referral forms, or if their mentor has managed to capture baseline data with the young person). Where no data has been collected, this is an opportunity to agree and record what data you plan to collect and how.

### **Organisational Development**

At this stage of setting up the service, there will have been few instances where Inspiring Scotland has been able to provide support to the organisation, either through the PA or from our pro bono panel. However, if you have any examples of such support, please describe them here.