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| 1. **Financial** 2. intandem project income and expenditure: -   *(with third month for ‘Actuals’ based on best available estimate)*   |  |  |  | | --- | --- | --- | |  | Planned | Actual | | Spend current quarter | £ | £ | | Spend current financial year to date (2017/18) | £ | £ | | Total Inspiring Scotland Investment to date | | £ | | Forecast balance at end of quarter | | £ |   Reasons for any variances were:-   1. Organisational income and expenditure: -  |  |  |  | | --- | --- | --- | |  | Planned | Actual | | Organisational Income Year to Date | £ | £ | | Organisational Expenditure Year to Date | £ | £ |   Reasons for any variances were:-     1. Cover (free reserves as multiple of monthly operating costs):  * Latest reserves position is |

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| 1. **Project Outputs: Milestones** 2. Milestones delivered versus plan for last quarter  |  |  |  | | --- | --- | --- | | **Milestone** | **By date** | **Achieved/Comments** | | *Recruit volunteer co-ordinator* |  |  | | *Finalise volunteer spec* |  |  | | *Advertise volunteer roles* |  |  | | *Produce leaflet* |  |  | | *Commence volunteer training* |  |  | |
| **Project Outputs: Staff**   1. Project staff and management input: actual vs plan for organisation and project.   *Please describe any significant management or other time inputs to the intandem service. Please use true headcount and give full time equivalent to help us understand.* |
| **Project Outputs: Monitoring data**   1. Mentors: actual vs plan.   *Please add indicative numbers going out to financial year end 2018 (i.e. March 2018). Add any explanatory text here.*   |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | | **Mentors** | **Recruited** | | | | **Trained/selected** | | | | | **Plan** | | **Actual** | | **Plan** | | **Actual** | | |  | New | Cum | New | Cum | New | Cum | New | Cum | | March |  |  |  |  |  |  |  |  | | **April** |  |  |  |  |  |  |  |  | | **May** |  |  |  |  |  |  |  |  | | **June** |  |  |  |  |  |  |  |  | | *Sep* |  |  |  |  |  |  |  |  | | *Dec* |  |  |  |  |  |  |  |  | | *Mar 2018* |  |  |  |  |  |  |  |  |  1. Mentees: actual v plan   *Please add indicative numbers going out to financial year end 2018 (i.e. March 2018). Add any explanatory text here. Milestones for 2017/18 are covered towards the final section, however consider when capacity will be reached when completing this section also*.   |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | **Mentees** | **Referred** | | | | **Matched** | | | | **No. of mentor/mentee meetings** | | |  | **Plan** | | **Actual** | | **Plan** | | **Actual** | | **Actual** | | |  | **New** | **Cum.** | **New** | **Cum.** | **New** | **Cum.** | **New** | **Cum.** | **New** | **Cum.** | | March |  |  |  |  |  |  |  |  |  |  | | **April** |  |  |  |  |  |  |  |  |  |  | | **May** |  |  |  |  |  |  |  |  |  |  | | **June** |  |  |  |  |  |  |  |  |  |  | | Sep |  |  |  |  |  |  |  |  |  |  | | Dec |  |  |  |  |  |  |  |  |  |  | | Mar 2018 |  |  |  |  |  |  |  |  |  |  |  1. Other activities…   *Please include a description of volunteer recruitment activities undertaken, contacts with referring agencies, progress to agreeing referral pathways, any activities or events provided for trained mentors and other waiting list activities; any activity days etc.* |
| 1. **Social Impact (Project Outcomes)**     **Outcomes:**  *e.g. numbers of mentees for whom baseline data gathered*  *Impacts measured* |
| **D. Organisational Development -**  *e.g. capacity building, training, accreditation, leadership & governance, public profile, operational issues (beyond intandem), planning, financial, fund raising.* |
| **Summary**  *To be completed by Performance Advisor* |
| **Milestones agreed for [next quarter]**  *See tables in 3 and 4 above for numbers.*  *Add text around key activities planned – examples provided below.*   |  |  |  | | --- | --- | --- | | **Milestone** | **Date** | **Comments** | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  |   **Milestones for the rest of the year (to Mar 18)**  *See tables in 3 and 4 above.*  *Add text around when you hope to reach capacity for trained mentors/referrals/matches if applicable in this period* |

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| **For Inspiring Scotland Use:**  Planned spend for forthcoming quarter £xx,xxx  Cash at end of previous quarter               £y,yyy  **PA Recommendation**  To make a payment of £z to fund activities to the end of September. |
| |  | | --- | | **Original budget**  for 2017/18 | | £ | |

Signed (PA) Signed (Head of Funds)

Date Date