

**Scottish Government**

**Scotland's International Development Alliance 2017-2020**

**End of Year Report**

This narrative report should be submitted together with your updated logframe, if applicable.

**PLEASE READ ATTACHED GUIDELINES BEFORE COMPLETING THE FORM**

<b>1. Basic Information</b>							
Complete the information below for management purposes. Please indicate in the relevant section whether any changes to your basic information (e.g. budget) have occurred during this reporting year. Explanations should be provided in section 3.							
1.1	<b>Reporting Year</b> From: 01/04/2017 To: 31/03/2018						
1.2	<b>Grant Year</b> (e.g. Year 1) Year 1						
1.3	<b>Total Budget</b> £262,947						
1.4	<b>Total Funding from ID</b> £225,945						
1.5	<table border="1"> <tr> <td><b>Supporting Documentation</b> Check box to confirm key documents have been submitted with this report</td> <td><b>Proposed Revised Logical Framework, if applicable</b> <input type="checkbox"/></td> </tr> <tr> <td>Please list any further supporting documentation that has been submitted</td> <td>Logical Framework agreed October 2017</td> </tr> <tr> <td></td> <td></td> </tr> </table>	<b>Supporting Documentation</b> Check box to confirm key documents have been submitted with this report	<b>Proposed Revised Logical Framework, if applicable</b> <input type="checkbox"/>	Please list any further supporting documentation that has been submitted	Logical Framework agreed October 2017		
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Please list any further supporting documentation that has been submitted	Logical Framework agreed October 2017						
1.6	<table border="1"> <tr> <td><b>Response to Previous Progress Reviews</b></td> <td><b>Scottish Government's comments on previous reports (state which report) :</b> n/a</td> <td><b>Action taken since the last report:</b> n/a</td> </tr> </table>	<b>Response to Previous Progress Reviews</b>	<b>Scottish Government's comments on previous reports (state which report) :</b> n/a	<b>Action taken since the last report:</b> n/a			
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1.7	<b>Date report produced</b>						
1.8	<b>Name and position of person(s) who compiled this report</b> [redacted], CEO						
1.9	<b>Main contact details, if changed</b>						

Signed [redacted] Date 20 April 2018 \_\_\_\_\_

Designation Chief Executive \_\_\_\_\_

**2. Progress and Results**

This narrative report on performance and results will be reviewed together with your revised and updated Logical Framework. See Guidelines (Annex 1) for details.

2.1	<p><b>Changes to Planned Activities</b></p> <p>Has the focus or delivery of your planned activities changed significantly over the last financial year? If so, please explain how and why, and attach copies of all relevant correspondence with the Scottish Government.</p>
	<p>No, apart from: later than anticipated start because of delays to recruitment of Membership Services Manager (August not April 2017) and replacement Effectiveness and Learning Advisor (July 2017). Media coverage and resultant widespread concern about abuses in international sector skewed CEO work plan from 12 February through year end.</p>

2.2	<p><b>Changes to the Logical Framework</b></p> <p>If changes have been made to the logframe since the beginning of the financial year please describe these below. Please also provide evidence (e.g. copies of correspondence) that these changes have been agreed with the Scottish Government. If you would like to make changes to your logframe, but these have not yet been approved by the Scottish Government, please describe and justify in detail the requested changes below – and highlight the proposed changes in the revised logframe.</p>		
	<b>Result Area/ Indicator</b>	<b>Proposed/ Approved Change</b> (please clarify and evidence below)	<b>Reason for Change</b>
	(Output 2.4.7	Two new output indicators added following discussion with SG at half year	Broad heading of social media combined with online platforms, in original logframe, unhelpful and new disaggregation provides better measurement
	(Output 2.4.8		

2.3	<p><b>Gaps in Monitoring Data</b></p> <p>If baseline or monitoring information is <u>not</u> available, please provide an explanation below. Where monitoring data has been delayed (since previous report), please provide an indication of when and how it will be made available to the Scottish Government.</p>
	<p>At impact level: Surveys establishing baseline and measuring change have not been conducted as the funding to commission them has not been sourced.</p>

2.4	<p><b>Project Outputs</b></p> <p>In the table below, please list each of your project outputs, and provide further detail on your progress and results over this reporting period. Describe any delays or other challenges that you have experienced and how these have been addressed, and provide information about any unexpected results. Progress should be supported with evidence (such as links to monitoring data in line with logical framework, case studies, web-based information, reports etc.) where possible.</p>
	<p><b>Output 1: Membership Recruitment Strategy in Place</b></p>

Output Indicator	Progress against Planned Milestone/ Target
1.1	Membership Services Manager was recruited, starting in August 2017.
1.2	Research was carried out as part of the design of the Recruitment Strategy. During the design of the strategy recruitment processes and activities were piloted and implemented.
1.3	The Recruitment Strategy written by the Membership Services Manager was presented to the Board and approved in Dec 2017.
<b>Output 2.1 Improved opportunities for productive collaboration and for skill-building</b>	
2.1.1	<p>Have held 2 large events and 1 small scale event outside of central belt (Aberdeen) and a number of additional smaller events throughout the year.</p> <p>Annual Conference in Glasgow, 13<sup>th</sup> September 2017: 137 delegates Attendees included representatives from NGOs, universities and businesses.</p> <p>Training Event in Aberdeen, 21st November 2017: 7 delegates This was the first time that we had held an event in Aberdeen and feedback from the day was very positive.</p> <p>Training Day in Edinburgh, 8<sup>th</sup> March: 28 delegates</p>
2.1.2	Data collection insufficient for this indicator. We should either work harder at this or stop seeking this data. For discussion with SG
2.1.3 & 2.1.4	<p>Set up 4 online collaboration opportunities against a milestone of 12, that were reported on in first half of the year - 'partnership hubs' for Scottish Government main grants Rwanda/Zambia programme, for potential bidders under DFID's 'UK Aid Connect' and for Scottish Government small grants programme.</p> <p>Creation of new online platforms not yet complete, but in process. Will be up and running from early in new financial year, Year Two 2018/2019</p> <p>10 organisations used the above collaboration opportunity.</p>
<b>Output 2.2 Links are facilitated with universities and businesses which have the potential to form productive partnerships with NGOs.</b>	
2.2.1	Annual Conference held in partnership with Glasgow University and Scottish Power
2.2.2	Participation of universities and businesses encouraged at 3 x quarterly meetings with Scottish Government. Exploratory meeting with CEO of

	Scottish Business in the Community re collaboration and with international programmes manager Social Enterprise Academy
2.2.3	Creation of new online platforms not yet complete, but in process. Will be up and running from early in Year Two 2018/2019
<b>Output 2.3 Members receive regular, high quality, relevant information resources</b>	
2.3.1	12 newsletters were published against a target of 12
2.3.2	At the end of March 2018, there was a total 3152 newsletter subscribers against a target of 2500
2.3.3	Average number of readers is 947 against a target of 700
<b>Output 2.4 Generic membership services are delivered which drive up professionalism and effectiveness, especially in organisational development, grant management, fundraising, effectiveness and profile raising</b>	
2.4.1	<p>Members used our website 48 times to promote their events throughout the year. Members also advertised their vacancies a total of 38 times on our new website since August.</p> <p>These numbers are against a milestone of 12 'notifications' for the year. This output milestone should perhaps be adjusted for next year?</p>
2.4.2	20 member one-off enquiries dealt with against a milestone of 18. We also answered 12 non-member one off enquiries.
2.4.3	Resource Uptake – we have had unexpected difficulties with tracking numbers of users but there are being resolved. We have had 114 unique page views (but this could include users who visit a number of times) and visitors have spent on average 10 minutes looking at our content. Target was 30 users
2.4.4.	30% of Scottish Government Small Grantees are using Accompaniment Service via mentoring, roundtable discussions and one-off enquiries against a target of 33%
2.4.5	<p>MEL Group – 14 member organisations belong to the group, 21 members participants. But only 2 meetings took place this FY because of Effectiveness staff turnover.</p> <p>2 new Working Groups have been started:  Leave No-One Behind (LNOB) – 9 member organisations (plus 3 core committee) with 11 member participants.</p> <p>Fundraising Working Group – 10 member organisations (2 core committee)</p>

	Working Group engagement total = 33 across our membership and different members attending. Target was 30  This part of the Logframe could usefully be re-written to take account of new Working Groups.
2.4.6	14 individually tailored one-off support and advice sessions delivered (3 since mid term report) Milestone was 8.
2.4.7 & 2.4.8	These outputs were additions made at half year reporting stage. From October (6 months) the total number of face book posts and tweets about member news and activities was 49 and 55, against milestones for the year of 96 and 48 respectively.
<b>2.5 Specific individually tailored services delivered for members requesting support for sustained organisational development and improvement to effectiveness</b>	
2.5.1	Going for Growth has been developed and is in stages of piloting to include elements of peer learning rather than only mentoring. We are behind schedule but ready to pick up. We aim to re-brand 'Doing Even Better' as 'growth' isn't always the best goal for this cohort.
2.5.2	5 new mentors recruited and inducted from a range of backgrounds including fundraising, strategy development and communications. These mentors complement our existing pool of 4 mentors.
2.5.3	A new online financial management training series offered as part of this programme to reach wider membership. 4 organisations have participated in this.
<b>Output 3.1</b>	<b>Media &amp; Comms Strategy in place</b> Not resourced, so should either be resourced or removed from logframe for clarity
<b>Output 3.2</b>	<b>Media &amp; Comms Strategy implemented</b> Not resourced, so should either be resourced or removed from logframe for clarity
<b>Output 4.1</b>	<b>Policy Group of the Board re-started.</b>
4.1.1	Composition, Terms of Reference, modus operandi, priorities and protocols of new Policy sub-Group known as the 'Alliance Policy Committee' were all agreed at Board level by December 2017.
4.1.2	Two initial meetings have been held, chaired by Board member, [redacted]; and membership of the group has been established. Priorities have been set and collaborative working has commenced.
<b>Output 4.2</b>	<b>Lead role taken in facilitating participation of Scotland's international development sector in</b>

	<b>drive to meet SDGs in Scotland, the UK and internationally</b>
4.2.1	Co-wrote an open letter, with Scotland's SDG network, to decision makers and key stakeholders across Scotland. Invited all members to co-sign – invitation widely accepted.
4.2.2	Maintaining lead role in Scotland's newly established SDG Network established by the SCVO. We have inputted into the policy and advocacy strategy of the network, chaired meetings and written an article outlining the international perspective.
<b>Output 4.3</b>	<b>Lead role played in organising the Scottish Parliament's Cross Party Group on International Development, on behalf of the sector.</b>
4.3.1, 4.3.2 and 4.3.3	Since taking over secretariat role at the CPG's AGM in September 2017, two further meetings have been held. Attendance and interest from external members has been high, with over 40 guests at each event. MSP attendance was poor at the December meeting (only convenor present), and very good in February (8 MSPs). Improve indicators on lograme?
<b>Output 5.1</b>	<b>Website capability is upgraded to support enhanced online membership services and collaboration</b>
5.1.1 and 5.1.2	Online discussion forums are being developed and will be live from May 2018. We have had problems we did not anticipate with website developers which are not yet completely resolved.
<b>Output 5.2</b>	<b>Staff roles and responsibilities redefined to align with new outcomes of plan.</b>
	This is achieved and now feels historic. This output could be taken out or replaced with another more useful one.
	<b>Output 5.3 Means identified of broadening the funding base without deviating from outcomes</b>
5.3.1	Membership income has increased by 22% this year, with a total of £28,609 coming from membership fees. We have also received an additional £2,525 from bank interest, advertising, sponsorship and exhibitor fees.  This is the highest number of members, and highest membership income, ever recorded.  Our new recruitment strategy was only implemented half way through year one because the Membership Services Manager only started in August. Our original year one target of £37,002 did not account for non-renewing members.
5.3.2	We have also received an additional £2,525

		from bank interest, advertising, sponsorship and exhibitor fees. This is under target partly because of CEO time constraints and partly because of late appointment of Membership Services Manager
	<b>5.4 Monitoring and evaluation of plan is developed and implemented enabling the organisation to measure and learn from activities.</b>	
	5.4.1 A MEL plan has been drawn up and agreed.	
	<b>5.5 Transparency Strategy devised, implemented and achieved to publish data to IATI standard</b>	
	5.5.1 The Board wish to postpone because of priority need to have GDPR policies in place and any revisions made to safeguarding policies. Permission will be sought from Scottish Government to alter the logframe accordingly.	
2.5	<b>Project Outcomes</b> In the table below, please list your project outcome, and provide further detail on your progress and results over this reporting period. Please describe any delays or other challenges that you have experienced and how these have been addressed, and provide information about any unexpected results. Progress should be supported with evidence (such as links to monitoring data, case studies, web-based information, reports etc.) where possible.	
	<b>Outcome 1 – An enlarged and widened membership base to include all with in interest in international development in Scotland</b>	
	<b>Outcome Indicator</b>	<b>Progress against Planned Milestone/ Target</b>
	<i>1. Total number of members</i>	Because of lapsed memberships from the previous year, the starting baseline was 94, not 110. At the end of the year our membership total was 132, with 38 new organisations joining us throughout the year. With just 8 joining in the previous year this demonstrates significant growth for us.  Although we have not reached the original planned milestone of 200, we have increased overall membership by 19% and membership income by 22% from the previous year.
	<i>2. Number of members from other non-traditional NGO sectors</i>	12 organisations joined us from non - NGO organisations. Taking our total number of non-traditional members to 17, just 3 away from our milestone of 20.
	<b>Outcome 2 - Members benefit from use of services designed to meet changing needs</b>	
	<b>2.1</b>	We have instituted a new 'Users Panel' not shown in the Logframe to give us some ongoing qualitative information. It could be useful to change the Logframe to show this information?
	<b>2.2</b>	Level of take-up of services. Quantitative data shows an increase from 289 baseline to 337 at end Year One
	<b>Outcome 3</b>	<b>Improved perceptions of international development and of the profile of the sector in the minds of the public and other key stakeholders in Scotland.</b>

	<b>Outcome 4</b>	<p>No work was directly done on this area as it was not resourced. This should be removed from the logframe unless the Scottish Government were to reconsider its decision not to fund work towards achieving this outcome.</p> <p><b>The international development sector is well represented on policy and advocacy issues.</b></p> <p>Apart from SDG actions mentioned above, we also took part in high level meetings with DFID in Whitehall to represent the Scottish sector in consultations around the redefinition of ODA; and we organised a roundtable meeting for members with the Secretary of State for International Development in January 2018</p>	
2.6	<p><b>Risk Management</b> If progress towards delivering activities and outcomes is slower than planned or there have been delays in delivery, please explain: a) What the issues have been? b) What actions have been taken in response to these issues?</p>		
	<b>Issue/ Risk</b>	<b>Action Taken</b>	<b>Outcome</b>
	Late appointment of staff, and staff turnover		
	Unforeseen problems with website redevelopment which delayed the setting up on online forums		
	Please add additional issues as required		

<b>3. Sustainability</b>	
3.1	<p><b>Exit Strategy</b> Describe the key components of your exit strategy and outline progress towards achieving it. Provide any other achievements or progress towards ensuring that your organisation remains sustainable in the longer term. Describe any challenges and how these will be addressed.</p> <p>Diversifying income is key to our sustainability. We have made steps in the right direction, below target but still meaningful. The main challenge remains shortage of human and financial resource to allocate to income generation. The constraints imposed by GDPR and the negative public perceptions of international development resulting from the wave of negative media coverage, both impose further challenges.</p>

<b>4. Financial Report</b>	
<p>The narrative report below should be provided in conjunction with the Budget Spreadsheet report (see Annex 2). Please fill in the Budget Spreadsheet to: (a) confirm actual spend for the year and justify any significant disparities between programmed expenditure and actual expenditure within the financial year, (b) detail programmed spend for next year.</p>	
4.1	<b>Underspend</b>



	<p>Please note where your organisation anticipates a significant underspend, and where you intend to request that some funds are carried forward with the agreement of the Scottish Government. Please provide justification for this underspend below. Please note that any carry-over of funds to the next financial year should be agreed with the Scottish Government by January 31<sup>st</sup> of the current financial year.</p> <p>We are requesting to carry forward £19,119.</p>
4.2	<p><b>Expenditure</b> Please comment on the breakdown of expenditure explaining any significant disparities between projected expenditure and actual expenditure.</p> <p>The biggest variation is in staff cost, caused by late appointments and by some gaps between appointments. This accounts for £10,650 of the above underspend request and has been allocated throughout the two remaining years of the plan on the appointment of a new part time Admin &amp; Comms Assistant</p>
4.3	<p><b>Cost Effectiveness and Efficiency</b> Please detail any efforts to reduce costs, whilst maintaining quality– for example through managing costs, efficient resourcing, working with and learning from others etc.</p> <p>We have engaged experts from the membership, rather than hire speakers/facilitators, for several of our information share and peer learning events, e.g in our Safeguarding Information Day in March, only one from our panel of speakers charged a fee.</p>
4.4	<p><b>Co-finance and Leverage</b> Please provide details of any co-finance or leverage that has been obtained during the reporting period, including how the funds/ resources will contribute to delivering more and/or better outcomes.</p> <p>N/A</p>

## Annex 1: Guidance Notes: End of Year Report

- This report is to be completed at the end of the financial year
- Please complete this form electronically.
- Once complete please send this reporting form, by email to your Scottish Government project manager.
- The report should be submitted by the end of April following the financial year to which the report relates.

Question	Guidance
<b>Basic Information</b>	
1.1	Insert the financial year for which you are reporting
1.2	Insert the year of your funding (i.e. Year 1, 2 or 3)
1.3	Insert the total budget (including funding from other sources). Please make a note if this has changed during this financial year. Reasons for changes should be reported in section 3.
1.4	Insert the total amount of funding received through the IDF.
1.5	Confirm that supporting documentation has been included with your report. Please tick those boxes that apply. Confirm whether any changes have been made to the logical framework, and whether the LF submitted has been approved by the Scottish Government (or is pending approval).
1.6	Please reference previous (actionable) feedback that you have received since your last report, and describe any action that has been taken in response/ since then.
1.7	Insert the date that your report was produced.
1.8	Insert the names and positions of the key person(s) involved in preparing your report.
1.9	It is essential that you let us know if any of your contact details have changed.
<b>Progress and Results</b>	
2.1	If your planned activities have changed significantly in focus or delivery since inception, please explain how and why, attaching copies of all relevant correspondence you have had with the Scottish Government about this. Please also describe and explain any changes to basic information here.
2.2	If your Logical Framework has changed over the last Financial Year please detail and explain these here. This enables us to more quickly understand the changes and your progress, based on the most up-to-date information.
2.3	An update on any delays or challenges in monitoring will help us to understand the information presented in the report and logframe.
2.4	<b>For this question you will need to refer back to your most up-to-date APPROVED logical framework.</b> Looking again at the <i>output indicators</i> outlined, please comment on the progress made towards achieving these during the reporting period, including any challenges and how these were overcome. This should include a narrative (where relevant) as well as quantitative data – indicating clearly the milestones (including dates) and progress to date using the same measurement unit (e.g. number/percentage) provided for the baseline etc. should be outlined using a percentage or number. E.g. By end March 2016, 5 training sessions delivered in the last year against a milestone target of 4.
2.5	<b>For this question you will need to refer back to your most up-to-date APPROVED logical framework.</b> Looking again at the <i>outcome indicators</i> outlined in your original application, please comment on the progress made towards achieving these during the reporting period, including any

	challenges and how these were overcome.
2.6	If progress towards delivering activity and outcomes has been slower than planned, please use this space to indicate the reasons why and whether any risks outlined in your application have impacted on activities and outcomes.
<b>Sustainability</b>	
3.1	Detail briefly your progress towards ensuring that your organisation will be sustainable in the longer term. You may wish to refer back to your application form as well as reflecting on other elements of sustainability.
<b>Financial Reporting</b>	
4	<b>For this question, you will also need to complete the budget spreadsheet at Annex 2.</b> Please use the budget columns to provide a breakdown of actual expenditure incurred during the financial year to which this report relates, against expenditure planned as well as expected expenditure for the next financial year.
4.1	It is important for us to understand reasons for underspend.
4.2	Please outline any reasons for any discrepancy in the budget spend
4.3	The Scottish Government is interested in how organisations are working efficiently and effectively.
4.4	Please detail if your organisation has succeeded in sourcing additional funds to enable it to extend its work.

**Annex 2: Budget Spreadsheet**

Please provide a breakdown of actual expenditure for the financial year to which this annual report relates, compared to the projected expenditure detailed in your original application form.

Budget Headings	Projected Expenditure 1 April 2017 – 31 March 2018	Actual Expenditure 1 April 2017– 31 March 2018
Staff Costs	£ 161,166	£ 148,563
Office & Management Costs	£ 35,346	£ 35,393
Programme Costs: Outcome 1	£ 4,400	£ 664
Outcome 2	£ 54,055	£ 48,286
Outcome 3	£ 4,080	£ 3,619
Outcome 4	£ 3,900	£ 1,398
Outcome 5	£ 0	£0
<b>TOTAL</b>	<b>£ 262,947</b>	<b>£ 237,924</b>

**NB: This report is prepared against the total budget for this year, which includes Scottish Government grant income of £225,945, as well as membership income and other unrestricted income streams.**

**Please also refer to the underspend report and carry forward request, an updated version of which was submitted on 20 April 2018.**

Please provide a breakdown of projected expenditure for the next financial year, using the budget headings agreed with the Scottish Government.

Budget Headings	Projected Expenditure 1 April 2018 – 31 March 2019	
Staff Costs	£ 169,023	
Office & Management Costs	£ 36,760	
Programme Costs: Outcome 1	£ 3,800	
Outcome 2	£ 60,478	
Outcome 3	£ 1,000	
Outcome 4	£ 5,020	
Outcome 5	£ 2,000	
<b>TOTAL</b>	<b>£ 278,081</b>	

**Based on the following income streams:**

Scottish Government grant 2018-19: £224,008

Scottish Government underspend carry forward from 2017-18: £19,119

Unrestricted income: £34,953

**Total projected income 2018-19: £278,080**

NB: This does not include other sources of grant income which await confirmation (e.g. from DFID and BOND). These would fund additional staff posts and associated programme costs.