

**Scottish Government**

**SFTF 2017-2018**

**End of Grant Report**

This narrative report should be submitted together with your updated logframe and completed budget spreadsheet.

**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>	<b>From:</b> April 2017 <b>To:</b> March 2018	
1.2	<b>Grant Year</b> (e.g. Year 1)	<b>Year 1</b>	
1.3	<b>Total Budget</b>	<b>£160,240</b>	
1.4	<b>Total Funding from ID</b>	<b>£158,240</b>	
1.5	<b>Supporting Documentation</b> Check box to confirm key documents have been submitted with this report	<b>Proposed Revised Logical Framework/business plan, if applicable</b> <input checked="" type="checkbox"/>	
	Please list any further supporting documentation that has been submitted	Other, please detail: Budget sheet	
1.6	<b>Response to Previous Progress Reviews</b>	<b>Scottish Government's comments on previous reports (state which report)</b> There were no comments on mid-term report	<b>Action taken since the last report:</b>
1.7	<b>Date report produced</b>	<b>18 April 2018</b>	
1.8	<b>Name and position of person(s) who compiled this report</b>	[redacted], Chief Executive [redacted], Development Manager [redacted], Engagement and Communications Officer	
1.9	<b>Main contact details, if changed</b>		

Signed by [redacted] Date: 18 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	<b>Changes to Planned Activities</b>	
	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.	
No		
2.2	<b>Changes to the Logical Framework/Business Plan</b>	
	If changes have been made to the logframe/business plan 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/business plan, 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/business plan.	
	<b>Result Area/ Indicator</b>	<b>Proposed Change</b> (please clarify and evidence below)
<b>None</b>		
2.3	<b>Project Progress and Results</b>	
	In the table below, please provide a summary of the key areas of progress and results achieved <u>for each project output and outcome</u> . Describe in brief any delays or other challenges that you have experienced and how these have been addressed, and provide information about any unexpected results.	
	<b>Output/Outcome</b>	<b>Summary of Progress and Results</b>
	Outcome Indicator 1 Target	At the time that the application was submitted, it was assumed that the SG would carry out its review of support for Fair Trade in 2017/18 and that this would inform our business plan. As the review has been rescheduled for 2018/19, it was agreed to apply for one year funding from the SG to allow the SG Review in 2018/19 to inform our business plan.
	Outcome Indicator 2 Target	Target achieved. Research on the Fair Trade Sector in Scotland was undertaken including a survey of Fair Trade retailers and suppliers with analysis carried out. A consumer survey of a representative sample of the Scottish population was undertaken and the results analysed. A report was then written making recommendations for future actions which informed the funding application for 2018/19.
	Output Indicator 1.1 Target	Target achieved. Data gathered and analysed.
	Output Indicator 1.2 Target	Target achieved. Data gathered and analysed
Output indicator 1.3 Target	Target achieved. Data collected, analysed and report written and published. Recommendations	

		made and input into planning for 2018/19 and longer term business planning.
	Output indicator 2.1 Target	Target not achieved. The engagement with public bodies on the sharing of detailed case studies proved to be more difficult than anticipated. This has meant slower progress than originally expected. However, work is ongoing on producing three case studies (NHS, local government and higher education) for publication to be followed up by an event. This work is ongoing.
	Output indicator 2.2 Target	Target not achieved. There was not a positive response from 5 of the targetted businesses. The pool of businesses targeted will be expanded going forward. This work is ongoing.
	Output indicator 2.3 Target	Target achieved. Case studies written and published on website. Toolkit created and key events 2018-21 identified.
	Output indicator 2.4 Target	Target achieved. Follow up with 4 key partners. Identified challenges and opportunities to inform further work with the cultural sector.
	Output indicator 3.1 Target	Target achieved. Key international contacts met at the International Fair Trade Towns Conference (IFTTC) in Saarbrucken and the Forum co-led 2 workshops on Fair Trade Nations and Regions. There have been follow up calls and online communications developing our international links.
	Output indicator 3.2	Target achieved. Following the IFTTC, the forum led on redrafting the MoU and gaining agreement on developing assessment guidelines and process. This progress informed plans for 2018/19
	Output indicator 4.1 Target	Target achieved. Regional database produced. Plan for 2018/19 developed and training resources produced.
	Outcome indicator 4.2 Target	Target only partly achieved. Survey of training needs was carried out leading to resources being produced. Due to a combination of logistical factors including adverse weather, the training sessions were not held but the training resources, however, were distributed electronically for campaigners.
	Output indicator 4.3 Target	Target exceeded. More than 8 newsletters were distributed. The website was maintained and our social media presence and engagement was developed further.
	Output indicator 4.4 Target	Target achieved. The Fair Trade Nation Lecture was held in Glasgow and the Campaigner Conference in Perth with input from the Fairtrade Foundation, the Trade Justice Movement and Scottish Government International Development. The Scottish Fair Trade Awards ceremony was held in Paisley. A number of events were held in Fairtrade Fortnight with visiting Mzuzu Coffee representatives (educational, business, government, parliamentary and community)
	Output indicator 5.1	Target exceeded. 8 meetings held with key



	from public sector procurement officials to progress with planned activities		more support to be able to produce case studies in the format required. A more focused approach going forward on working with 3 key procurement officials to support their production of case studies has been agreed.
	Failure to get 'buy-in' from targeted number of iconic businesses	Review of this area of work by Acting Development Manager	After review of progress and discussions with Fair Trade Wales who have a similar strand of work, it was concluded that in order to reach the target number of businesses engaging positively, a much larger initial pool of potential contacts is required.
	Difficulties in arranging regional training sessions	Distribution of learning and training resources electronically. Rescheduling of programme by Acting Community Engagement Officer	Campaigners were able to access the training resources online. A programme of regional networking events will be programmed for 2018/19
	Fundraising target not met	The Fundraising Working Group of the Board continued to monitor. Following a Discussion Paper presented to the Board, a decision was taken to undertake a strategic review of the Forum including its financial model and income generation. The Board established a Development Group of Board Members and Staff to lead on this work and a consultant from the Social Enterprise Academy was appointed to support this work.	The Development Group supported by the consultant has led on producing a draft 10 year Business Plan which will set out a direction of travel based on a business model that diversifies very significantly the income base of the Forum. This draft Business Plan will be completed in May for consultation with stakeholders, members, partners, supporters etc and will be finalised in the Autumn of 2018. It is envisaged that this approach will lead to a significantly smaller proportion of income coming from the Scottish Government.

	Please add additional issues as required		

**3. Financial Report**

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.

3.1	<p><b>Underspend</b> 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>

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

- This report is to be completed 6 months into the reporting 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 October during 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/business plan, and whether the LF/BP 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/Business Plan 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	Please summarise key progress and results, providing explanations where required.
2.4	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>Financial Reporting</b>	
3	<b>For this question, you will also need to complete the budget spreadsheet.</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. Please outline any reasons for any discrepancy in the budget spend. <i>N.B If the budget spend is more than 10% different from the original estimate please use the final column to provide more</i>

	<i>detail.</i>
3.1	It is important for us to understand reasons for underspend.



## **Annex 2: Budget Spreadsheet**