

End of Year Annual Review

The Robertson Trust aims to make a positive difference to people's lives with the donations we make. At the end of each year we conduct an annual review of the projects we fund to find out what they have achieved and what difference they have made. Any future payments are dependent on a satisfactory annual review.

For the annual review you need to send us the following information:

- 1 A copy of your organisation's most recent annual accounts.
- 2 A copy of your organisation's most recent annual report.
- 3 A report with evidence that you have achieved the outcomes and targets that you set at the beginning of the year. Please see below for help on how to do this.
- 4 If we are funding you for another year you also need to fill in and send us a '**Planning my Outcomes and Targets Form**' for the coming year.

Once we've received this information and we are happy with it we will let you know and, if applicable, we will release your next payment.

How to report on your outcomes and targets

Before you start you should look at the '**Planning my Outcomes and Targets Form**' that you filled in at the start of the year.

For each target tell us if you achieved it or not. If the target involved numbers then tell us what the actual numbers were.

For each outcome provide evidence about whether or not the outcome was achieved. It is often helpful if you can give us a case study to give an example of the difference you have made to the people you work with.

If you weren't able to achieve any of your outcomes or targets you should tell us why and set out your plans to tackle the problems you faced. Please be honest. In general we don't mind if things go wrong. But we do want to be reassured that you know why they went wrong and what you have learned as a result. For example were your plans too ambitious? Did your service users want something different? Did external factors get in the way? And what did you do instead?

Tell us about any unexpected outcomes

If we are funding a **project** (as opposed to making a donation towards your core work) please also tell us how these outcomes and targets fit into the context of your wider work and tell us about any other significant events that happened during the year.

We expect this report to be about 2-4 sides of A4. You can include photographs or diagrams if you want to. However please do not send us DVDs or videos.

Please contact The Robertson Trust if you have any problems or questions

We would rather hear from you and help than have you sit and worry or give us the wrong information

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