

Jo Walters Trust

Review of Activity 2010-2013

What are we doing?

“In memory of Joanna Walters, and to celebrate her life and achievements as an inspirational person, teacher and motivator, the Trust will provide opportunities to help people enrich their lives and the lives of others, through sport, outward bound, educational and environmental projects, both at home and abroad.”

How are we doing?

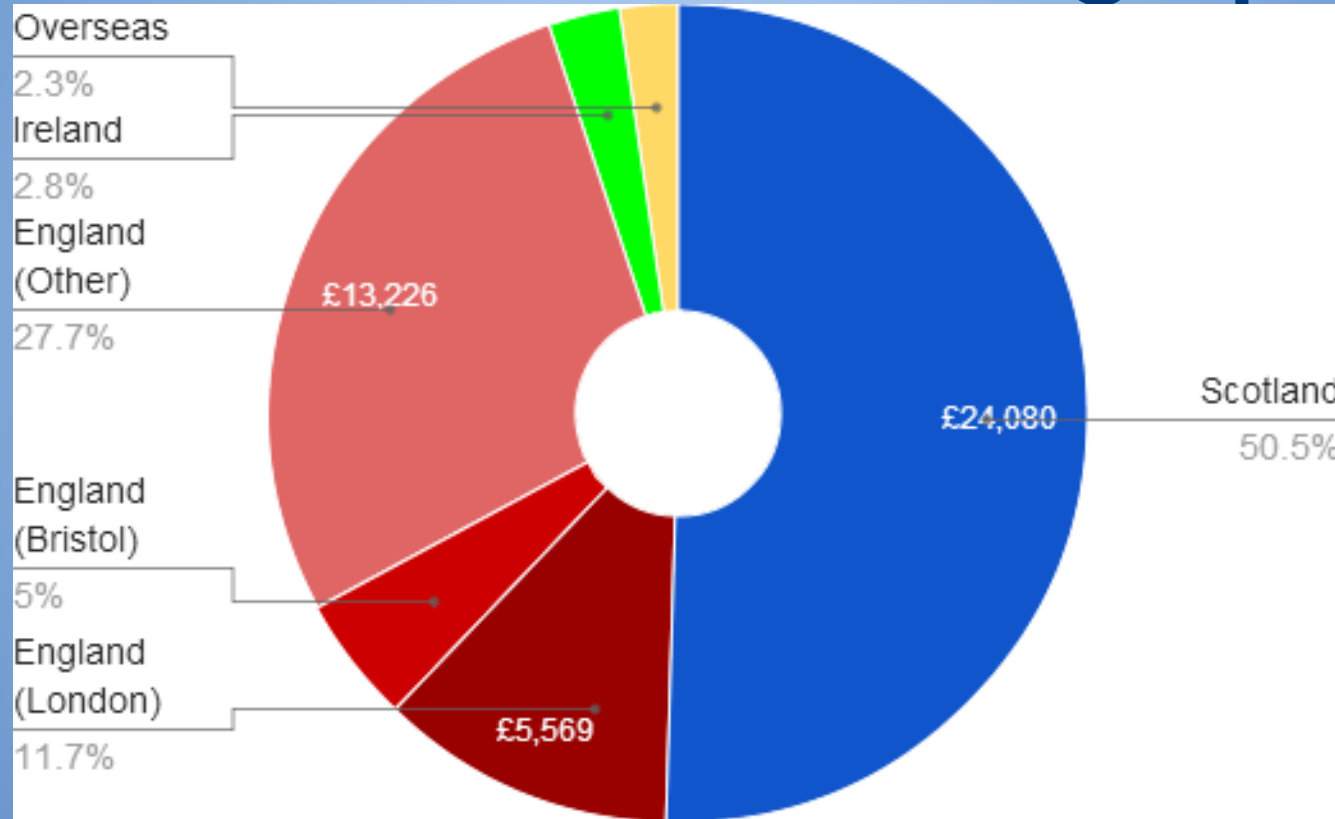
- Where's our money coming from?
- What have we spent it on? Where have we spent it?
- How have income and expenditure varied over time?

3 Years In...£95,061 raised

2010-12	2012-13	2013-14 (to Nov 2013)
Income: £81,210	Income: £8,549	Income: £5,072
Grants: £13,400	Grants: £12,850	Grants: £385
Fundraising Events: 8	Fundraising Events: 2	Fundraising Events: 4
Other: Trust launched, website created, cycle route Master Plan launched	Other: £50k invested with Oikocredit	Other: Blog launched, Lewes cycle lane opened,

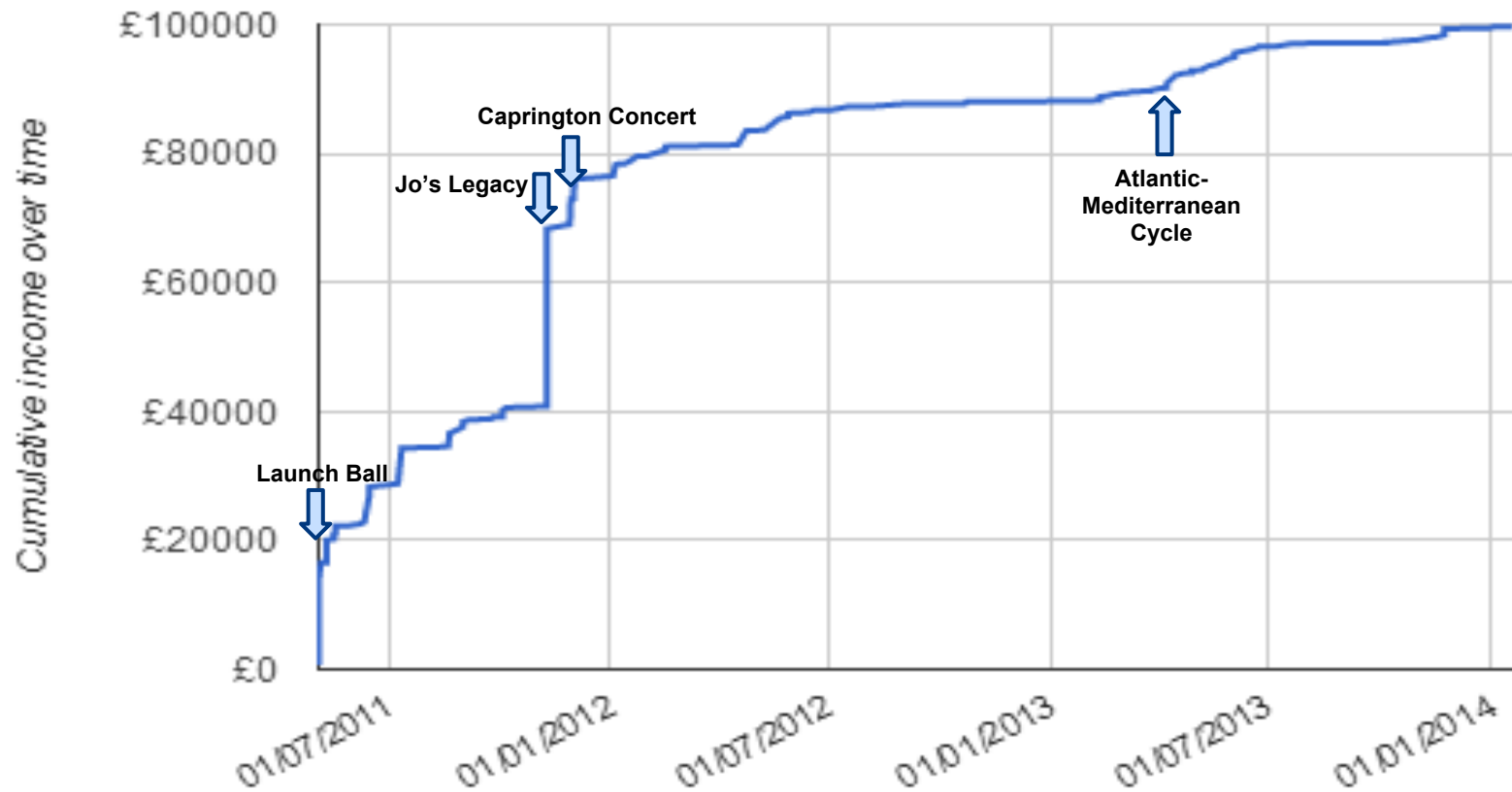
Income

Income Breakdown - Geographic*



*Based on location of fundraising events and residence of donors, where known.

Income over time



Expenditure

Total expenditure to date

Total expenditure: £37,435

Of this, £36,771 was spent on grants (ie 98%).

23 grants made so far:

[Chauncey Maples](#) - £3,500
[Jubilee Sailing Trust](#) - £3,300
[Women's Sport and Fitness Foundation](#) - £2,400
[Pitcaple Environmental Project](#) £2,000
[Deveron, Bogie & Isla River Charitable Trust](#) - £2,000
[Moldova Project](#) - £2,000
[Contact The Elderly](#) - £2,000
[The Project Trust](#) - £2,000
[Special Olympics Grampian](#) - £2,000
[Gordon Skiers Coaches](#) - £2,000
[Strathbogie RDA](#) - £2,000
[Satorishido Martial Arts](#) - £2,000
[Huntly Nordic Ski Club](#) - £2,000
[Bristol ACF](#) - £2,000
[Buchan Boys Brigade](#) - £1400
[Upper Deeside Amateur Swimming Club](#): £1250
Uniforms to Laikipia - £850

[Bennachie Leisure Centre Spinning Bikes](#) - £808

[Craigievar Primary School PTA](#) - £678

[Sarita Convent School](#) £385

Books Abroad - £100

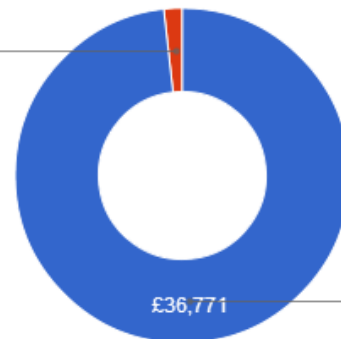
[Bristol OTC Cadet Prize 2012](#) - £100

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Use of funds

Expenses
1.8%

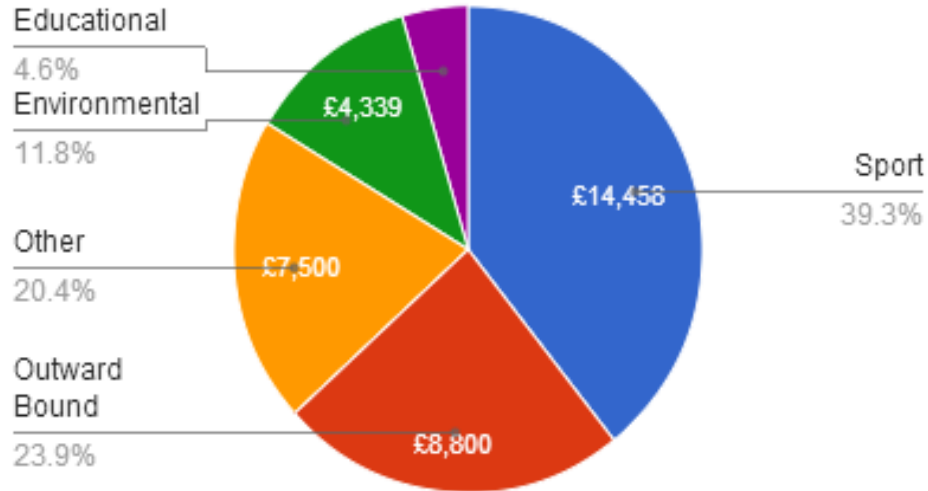
(Expenses were upfront costs associated from fundraising events)



Grants
98.2%

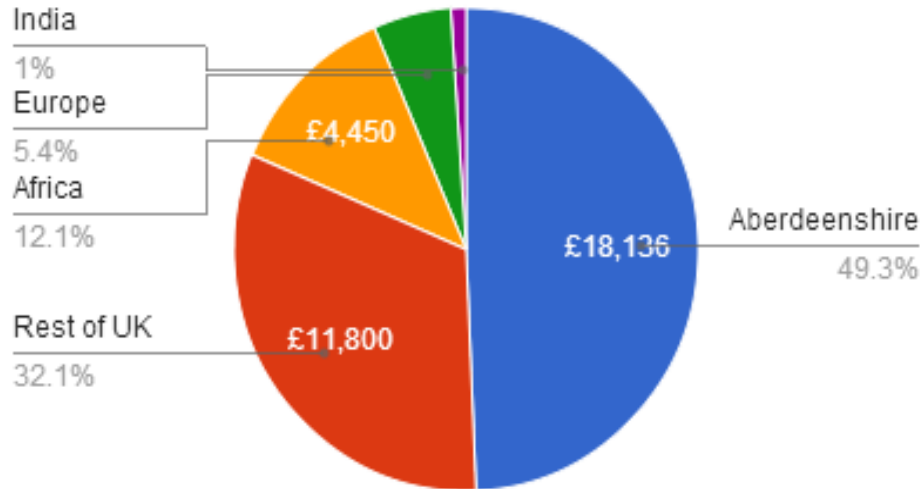
Grants Breakdown - Sector

Grants by Sector



Grants Breakdown - Geography

Grants by destination



Conclusions

Conclusions

Future grants to be spread across three strands:

1. A major project, probably in Africa, worthy of large, long-term support
2. Several grants/year to applicants in Aberdeenshire (up to £6,000 total)
3. Smaller annual grants to specific causes dear to Jo

JWT will also demonstrate:

- More ambition: Big target for fundraising in 2014: £20,000
- More transparency: Share strategy and annual report publicly
- More sources of fund-raising: To include setting up online shop
- More evaluation: Grant recipients to be contacted and surveyed to establish what works and what does not.
- More reach: We will consider establishing of 'Friends of JWT'