

**This template shows the questions that are in our online Funding Overview Form. Complete the final form in your online funding portal. Do not submit this Word document.**

**Funding Overview Form**

Comic Relief asks Funded Partners for written reports throughout the duration of their grants so that we can increase our understanding of your work, share learning with other Funded Partners, and assess the overall impact of our funding.

Comic Relief's reporting structure is as follows:

- Start of funding: Funding Overview Form (FOF); budget forecast

- Mid-year: phone call; ‘Keeping Us Informed’ (KUI) checklist

- Annual: written report; budget update; annual accounts; KUI checklist

- Final: written report; budget update; annual accounts; KUI checklist

**This is the Funding Overview Form (FOF).**

 It will form the basis for future grant reporting and conversations with your Portfolio Manager.

It will help us to:

- understand the context you work in (part 1)

- understand your ambitions for this funding (part 2)

- understand anything else about your organisation (part 3)

- understand, and remain accountable for, our commitments to progressive funding practice, including how we communicate about the work our funding supports (part 4)

We hope this report will help you to:

- understand our standard communications and touch points, and provide opportunities to discuss these

- anticipate what the basis of our conversations and reporting will be over the course of the grant

- understand why we ask for certain information and what we will do with it

We treat your reports as confidential but may use information from them for the above purposes, with your consent.

We encourage you to be as open as possible in your responses and we commit to the same in our conversations with you. We know that plans don't always happen as intended, and we'd like to ensure that we're able to identify and discuss additional support or revisions to your plans.

Please reach out to your Portfolio Manager if you need any assistance completing this form.

1. **The context you work in**

The questions in this section will help us better understand the context you work in, in order to help us understand other information in this report and discussions we have with you.

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| 1.1 This is a summary of what you told us you would like to do with the funding in your original application. |
| *[generated from Salesforce]* |
| If you believe you need to amend or update this, please use the text box below to explain what you would like to amend or update, and why, for our approval. (max. 1200 characters, approx. 200 words) |
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| 1.2 What are the main opportunities for this work over the grant period? For example, what is happening both inside your organisation, and outside in the wider operating environment, that might support or augment this work? (max. 1200 characters, approx. 200 words) |
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| 1.3 What are the main challenges for this work over the grant period? For example, what is happening both inside your organisation, and outside in the wider operating environment, that might create difficulties for this work? (max. 1200 characters, approx. 200 words) |
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1. **Your ambitions for this funding**

The questions in this section will help us to understand your ambitions for this funding, and how you will define what success looks like. We will reflect on these together in our mid-year conversations and annual reporting. You will be able to revise these outcomes during discussions with your Portfolio Manager over the course of your funding. We may use your outcomes to support communication about our own impact.

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| * 1. What are the changes you would like to see by the end of this grant, as a direct result of this funding? ('outcomes').

You can write between **two to five** statements, each one describing a single change. For example,* *‘Women from marginalised communities who are affected by domestic violence have improved access to specialist support’*
* *‘There is greater collaboration between government and civil society organisations leading to the involvement of people with lived experience of racial marginalisation in policymaking’*

You can refer to [this video](https://www.youtube.com/watch?v=kfjh3STeNp0) if you'd like more information about developing a strong, project-based outcome. You can reach out to us if you would like more support on writing your outcomes.Please note:* If you have flexible core funding, you can state the goals and mission of your organisation here, or you can focus on the specific purposes that these flexible core funds will contribute to, eg. staffing.
* You will be able to revise these outcomes during discussions with your Portfolio Manager over the course of your funding.
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| * 1. For each outcome, what information will you use to understand if these changes are happening? (‘indicators’)

These indicators could present descriptive-based (‘qualitative’) information that shows that change is happening, or number-based (‘quantitative’) information that shows how much change is happening.You can write between **two to five** indicators for each outcome.Indicators should not describe or count activities (like training) but focus on change (like increased knowledge).For example, * *‘Service users say that our specialist support is helping them become more confident’* (qualitative)
* ‘*There is greater dialogue between local authorities and charities about the importance of investing in services for young people*’ (qualitative)
* *‘20 insecurely housed service users gain access to specialist support’* (quantitative)
* ‘*We host an event with 100 people in attendance leading to increased awareness about violence against women and girls in the community*’ (quantitative)

Please refer to [this video](https://www.youtube.com/watch?v=D9cS9jiP5UM) if you'd like support in thinking about your indicators. You can reach out to us if you would like more support on writing your indicators.Please note, you will be able to revise these indicators during discussions with your Portfolio Manager over the course of your funding. |

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| Change you would like to see (Outcome) 1 |
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|  | Sign that this change is happening (Indicator)  |
| 1a |  |
| 1b |  |
| 1c |  |

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| Change you would like to see (Outcome) 2 |
|  |
|  | Sign that this change is happening (Indicator) |
| 2a |  |
| 2b |  |
| 2c |  |

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| Change you would like to see (Outcome) 3 |
|  |
|  | Sign that this change is happening (Indicator) |
| 3a |  |
| 3b |  |
| 3c |  |

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| Change you would like to see (Outcome) 4 |
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|  | Sign that this change is happening (Indicator) |
| 4a |  |
| 4b |  |
| 4c |  |

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| Change you would like to see (Outcome) 5 |
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|  | Sign that this change is happening (Indicator) |
| 5a |  |
| 5b |  |
| 5c |  |

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| * 1. Please describe the main activities you plan to deliver with this funding, in order to create the changes (outcomes) that you have stated above.

This helps us to understand *how* you intend to contribute to the changes you’d like to see and will support conversations with your Portfolio Manager during your grant.If you have flexible core funding, you can describe the broader organisational functions you'd like to support.(max. 1800 characters, approx. 300 words) |
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| 2.4 To support our ability to monitor and report on our own reach and impact, we ask you to tell us who and how many people are benefitting from your work.Please list the target groups that you expect to **directly** benefit from this work.These could be groups of people, such as communities, eg. young mothers, asylum seekers, etc. (please be as specific as possible), staff and/or frontline workers, that you expect to **directly** experience change due to this funding.This will help us understand more about the changes you hope to achieve with this funding. |
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| We do not ask you to set milestones or targets for ‘people benefitting’ to track or hold you accountable to pre-specified targets. The reason we ask for it is so that we can estimate our own reach in terms of total number of 'people benefitting' across all our funding. This helps us with our communications and fundraising, so that we can continue to raise money to make more grants in future.For example, we may calculate the total number of ‘people benefitting’ across all our funded partners to say:* *‘Since last Red Nose Day, our funding has helped reach over 1 million people in the UK’*
* *‘Since Comic Relief began, our funding has enabled our partners to support 10 million people through mental health programming’*

In order for us to better understand and use 'people benefitting' numbers, please tell us **how many people you expect to directly benefit through the work being funded by the end of the funding period.**In your Annual and Final Reports we will ask you to update us on the number of new people who have directly benefitted through the work being funded each year. In your first Annual Report, the new people will include everyone. In subsequent years, to avoid double counting, please ensure that this number only includes new people that have not been counted in previous reports.If you will be implementing a project or a dedicated stream of work using our funding you can state the number of people who will benefit from this project in the way that you usually count them. This could be the number of people you expect to enrol for the duration of the project, the number of people you expect will attend a variety of specific activities included within the project, or the number of people you expect to directly benefit from the work delivered by the project. If we are providing core funding as a percentage of your organisation's income, you can state a proportion of the total number of people benefitting from your organisation's work according to this percentage, eg. if you expect 1,000 people to benefit from your organisation's work over the funding period, and Comic Relief funding accounts for 30% of your organisation's income, you can say that you expect 300 people to benefit.We understand that, in your work, there may be lots of people who will indirectly benefit, however please do not include those numbers here (please see question below). In addition, counting people benefitting from advocacy or campaigning work may not be appropriate to include in the number of people benefitting directly from your work. If you feel this applies to your project/organisation please do not include those numbers here, but you may want to include an outcome and indicator/s to measure the impact of this type of work. |
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| How will you measure this number, and will you be able to provide evidence of how you have reached it (if required at a later date)? Please state whether you are counting people benefitting using the ‘project’ counting method or the ‘core funding’ counting method. (max. 900 characters, approx. 150 words) |
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| Your work may reach people who are still benefitting but are not being directly targeted. Also, you might be targeting particular groups through your work such as organisations or sectors. In addition, you might be delivering advocacy or campaigning work that intends to reach certain groups and/or the general public.Please list those people indirectly benefitting, groups or other stakeholders here, and state why they are important to your work. You don’t need to estimate how many of these people or groups you expect to be reached by your work, but you may want to mention it in your outcomes and indicators. |
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| 2.5 Please complete a budget template for your intended use of your Comic Relief funding for our approval.The budget is used as a basis for discussions with your Portfolio Manager: to reflect on planned activities and costs and help identify any variances that may benefit from support. For example, where changes in the operating environment such as high inflation are putting pressure on your anticipated costs.To submit your budget template:You will receive a task to complete in Salesforce when your budget is due. 1. Download the budget template from the documents tab in Salesforce.
2. Follow the guidance on the document to complete the template.
3. Upload the budget file into Salesforce using the separate financial report upload section.
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| 2.6 FOR UK FUNDING ONLY WHERE COMIC RELIEF FUNDS ARE SUPPORTING STAFF SALARIES:Comic Relief is a [Living Wage](https://www.livingwage.org.uk/) accredited employer. This means we pay the real living wage as a minimum to our employees and contracted workers.We are also a Living Wage funder. This means we aim to ensure any Comic Relief-funded salaries in the UK are paid at or above the real living wage.If you are based in the UK and are supporting staff salaries with this funding, please tick this box if you are aligned with the latest Living Wage rates (see www.livingwage.org.uk) in calculating these salaries.We will also ask this question in annual reports. The Living Wage is updated annually. If at any point in this funding you aren’t able to align with the latest Living Wage rates, your Portfolio Manager will follow up to explore how salaries supported through our funding could be brought back in line with the Living Wage. |
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1. **How** **we can best work together**

This section helps us to better understand your organisation and work on this funding partnership, and to continually improve how we work together throughout the funding partnership.

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| 3.1 Please share anything else about your organisation, context or ambitions for your Comic Relief funding that you haven't already been able to share in response to the questions above. This will help us understand more about you, your work and the dynamics of our partnership so we can better support you. (max. 1500 characters, approx. 250 words) |
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1. **Our accountability and communications**

Comic Relief is committed to progressive funding practice that seeks to shift power and enable meaningful participation by our funded partners and experts by experience in the issues we fund.

We have made commitments about who and how we fund (for example our [Funder’s Charter](https://www.comicrelief.com/funding/funders-charter/)), as we understand that this can have as much impact on our funded partners as the amount of funding we give.

Sometimes we need data from our funded partners in order to track and monitor these commitments, and to enable our accountability for these. For example, in your application we asked you some questions about diversity, equity and inclusion, so that we can better understand who our funding reaches and ensure we shape our funding to be fairer in the future.

The following question also helps us monitor and improve our commitments on funding practice.

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| 4.1 Our vision is a just world free from poverty. While we do not work directly with communities experiencing poverty and injustice, one way we contribute to our vision is by supporting our funded partners in a way that enables them to best achieve their own organisational missions and remain accountable and responsive to the needs of their communities. In order to understand and monitor how well our funding enables your organisation to achieve your mission, we will ask you to respond to the following question in annual reports: ‘On a scale of 1-5, how much has our funding better enabled you to advance towards your own organisational vision and mission?’* 1 - not at all (eg. we have to deviate from our mission to access this funding)
* 2
* 3 - to some extent (eg. we haven't had to deviate from our mission to access this funding, but it has created disproportionate additional work for us which reduces the time we can spend on our core work)
* 4
* 5 - to the fullest extent (eg. this funding enables us to advance towards our mission without creating disproportionate additional work)
* Don’t know
* Prefer not to say

You will have space to explain your answer and you will be invited to suggest what we could do that would make you increase this score in subsequent years.We will use this information to improve our funding practice (how we make decisions about, allocate and manage our funding). |

In annual reports, we will ask you for information that will enable us to encourage donations from the British public by promoting and increasing awareness of the incredible work you’re doing. Specifically, we will ask you for ‘Money Buy sentences’ and ‘story headlines’ that we can develop further and share across our communications channels (eg. email, website, social media, print etc.). Please note, you will only need to provide this information if you feel it is appropriate to your work.

At this time, we’re only sharing what we will ask in these questions for your information so you know what to expect in annual reports, and so that you can ask your Portfolio Manager about them now if you have any questions.

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| 4.2 ‘Money Buy sentences’ enable our audiences to better understand how their donations contribute to your work. They play a fundamental role in driving public support and fundraising. eg.: *‘£50 could help provide 200 meals for families at a local community centre in the UK.’* If you feel any aspect of the work our funding supports can be expressed as a ‘Money Buy sentence’, we will ask you to share these with us, so we may use them in public fundraising.Here are some ideas to write a strong ‘Money Buy sentence’:* + They should be clear and concise, ie. 1-2 sentences each
	+ They should be easy to understand, eg. everyday essential services and items (whatever these are in your specific context)
	+ Consider a range of values for ‘Money Buy sentences’, eg. what £5/£10/£25/£50 could help pay for
	+ If you have multiple ‘Money Buy sentences’ for the same value please share these too
	+ Please make clear if a ‘Money Buy sentence’ could be scaled up, eg. if £25 could buy 100 meals, could £50 buy 200 meals?
	+ You can write in local currency if you prefer, but we will exchange this to GBP for easier comprehension by our target audiences

Please note:* ‘Money Buy sentences’ are not publicly linked to specific funded partners or projects
* We will only use them while your funding is active, not after the end of your grant
* We may not use all ‘Money Buy sentences’ provided, because they are selected for particular communications based on their alignment with specific fundraising content and stories
* We may follow up with you if we have any queries or require any additional information before we use your ‘Money Buy sentence/s’
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| 4.3 Stories of impact capture our audiences’ imaginations and help encourage more donations. An amazing story can make a massive impression.If you have a story about the work our funding supports, we will ask you to share it with us. We understand that it takes considerable time to write a full story. Therefore, we only ask for a ‘story headline’, ie. a very short summary of a great story within the past year highlighting the difference your work has made to someone’s life. It could be about someone who has been directly supported, a project worker or volunteer, or it could be you. We ask for a short paragraph (max. 1800 characters, approx. 300 words) covering the following three elements: * What were things like for the person before receiving your support?
* What does the funding enable you to do to address this situation?
* What difference has the funding made?

 Please note:* We will follow up with you if the story headline you share could be developed into a full story for fundraising and communications, to ensure your full involvement in the process and alignment with our Safe Story Telling Guidelines
* We will not follow up on all story headlines shared - we make selections for particular communications based on a variety of different factors such as alignment to a campaign, if they are within strategy, or it could just be an amazing story
* Stories may be publicly linked to specific funding partners or projects with your consent
* For any stories you share with us, please ensure you are comfortable that any safeguarding and data protection concerns are met (eg. consent of individuals has been gathered, they are aware of the potential extent of publicity and/or, where appropriate, their story has been anonymised)
* If we follow up, we begin by discussing the amazing work you do, the people you work with and if there is someone who would be interested in sharing their story. We would keep you in the loop across all interviews and interactions as we craft the story together. We gather stories through a fully informed consent process and with safeguarding at the forefront of all our work. Once the story is consented it would be stored on our system to support the work of other teams within Comic Relief. We would get back in touch for any new opportunities to share your story such as making a video, recording the story for a podcast, being filmed for TV, or something else
* There is never any obligation to take part in story gathering; choosing not to take part will not impact your funding in any way
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Thank you for taking the time to share this information with us.

Your Portfolio Manager will be in touch to talk through your responses, or you can reach out to them directly if you have any comments or questions.