Final year and end of grant report form guidance notes: Level 2

These guidance notes are designed to support you in completing your final year and end of grant report. You will also need to refer to your start-up form as well as any previous annual reports you have submitted to Comic Relief for this grant.

We also ask you to submit your financial report for the year (using the Comic Relief template) alongside this narrative annual report.

Final year and end of grant report process

When you have completed your narrative and financial reports please upload them to Salesforce. Your Comic Relief grant owner will review these to ensure the following:

- To check we have the information we need to understand what has been achieved over the course of your grant and for our marketing and communications needs and that all sections are completed clearly in accordance with these guidance notes.
- To see if your grant achieved what it set out to achieve and understand the key factors that have either helped or hindered that achievement, and what lessons and learning have come from the grant.

We may come back to you with questions for clarification, particularly where progress has fallen substantially short of what you expected. We may also ask you to revise and re-submit the report where appropriate. We can only release your next payment once the report has been agreed.

General points to note for completing the report

- The report asks you to re-state and review the information from your start-up form and / or previous annual reports. This will allow you and us to review progress against your original plans and understand the ongoing changes and adaptations that will inevitably be needed.
- Please complete the relevant sections with information from your start-up form/previous annual report form where specified – these are coloured grey in the report template. You should not change this information when you copy it into the report form.
- Most narrative response sections have a maximum character limit. Please do not exceed this limit. Equally, do not feel you have to fill up the character limit for every section. We are looking for concise explanations or summaries for each question, to provide the context for the rest of the report.
- Please do not add additional boxes or fields.
- Where a number is asked for, please provide a single number only rather than additional characters, ranges of numbers or two separate numbers. If further explanation of a number is required please use a footnote.
- The information given in the report should make sense to a reader who is new to the project.

Grant Summary

Complete the table in the summary section and refer to your Conditions of Grant document to ensure that the Grant ID, start date and total value of the grant are entered accurately.

1. Reflections on overall progress during your final year

This section should provide a brief overview of your project over the past year and provide the context for the rest of the report. We want to hear about what has worked and, just as importantly, what has not worked. We understand that original project plans often don't work out as expected when implementation begins. If this is the case, what is important for us is to understand why and see how you have adapted to this. We are open to you changing your approach or activities or budget where this is clearly based on your learning and will better help you deliver the change that your project is working towards.

1.1. Please give us an overview of what has happened over the past year and whether you feel you were able to deliver the plans you had for this year (2400 characters max.)

This should be a narrative overview of your project over the last year and how successful you feel you have been. You should refer to any key achievements and issues faced over the year.

1.2. Strengths, weaknesses, opportunities and threats

You will first need to <u>copy the text from your start up form/last annual report about how you planned to respond to the opportunities and threats/risks you identified at that point</u>.

- Reflecting back on those opportunities, threats and risks you had outlined previously, please share with us what the successes and strengths of the project have been over the past year (900 characters max) and the weaknesses and challenges you have faced (900 characters max)

2. Reflections on the whole grant

2.1. Please tell us what have been the most significant achievements over the life time of this grant (2400 characters max.)

Please provide us with what you feel have been the most important achievements of the grant in terms of the changes you have been able to contribute to for the people the grant has been supporting. Please provide any key statistics or evidence that back up these achievements.

2.2. What are you most proud of from the grant? (2100 characters max.)

Please let us know what has made you most proud from the grant – this could be anything from from how the work has affected your organisation, how you have influenced others, how you have implemented the work and the project workers involved or the changes the grant has made for the people is supporting.

2.3. Did you achieve what you had hoped over the lifetime of the grant? If you did, what were the key factors underpinning this? If not, what key factors prevented this? (2100 characters max.)

Looking back at what you set out to achieve at the beginning of the grant, please tell us how much of that has been achieved. We recognise that in many cases original plans and ambitions get altered and adjusted in the realities of implementation and because of many other factors outside of the control of the grant. Some of these factors may have allowed more success than originally expected and others may have hindered achievements. Its important for us to understand and learn from these both positive and negative factors so please provide us with your views on what have been the key supportive and hindering factors in what you have been able to achieve in the grant.

2.4. How sustainable do you think the changes you have achieved will be and how have you tried to build sustainability into the changes? (1800 characters max)

Please let us know what your approach has been to building sustainability into the changes you have been able to contribute to, and also how confident you are that these changes will continue beyond the life of your project and why.

2.5. What key lessons will you take from this grant into any future work? (2100 characters max)

Please let us know what the most important lessons for you have been from this grant – these may be around anything related to the grant, e.g. how change happens for the target group you have been working with, the types of changes, intervention approaches, project planning and implementation, operational matters, partnership working or influencing others.

2.6. What are your plans for this project or work in future? (2100 characters maximum)

Please tell us if you have plans to continue the work and activities funded under this grant and if so, how you plan to continue and develop this. Please note that your response here is not linked in any way to any further funding from Comic Relief and we are unable to respond to request for further funding made here.

3. What has changed as a result of your work?

3.1. Achievement of outcomes

This section is for you to provide more detailed information and reflections on the achievement of your outcomes, and what your data tells you about the effectiveness of your interventions. Meaningful change often takes time, may not be achievable for everyone or may be a complicated process involving a range of external factors. It is important for us to understand how and why outcomes of your grant have been achieved or not and what learning we can take from this.

For each outcome table:

Please insert into the grey cells the outcome statements, indicators, what you wanted to achieve over the course of the project for each indicator and your outcome project targets, as specified in the latest version of your start-up form. Please do not change these or add anything new.

Looking at the data you have across your indicators, what have you achieved against this outcome and what learning does this give you about the effectiveness of your approach or the issue the outcome is addressing? (1800 characters max)

Your data should be telling you about your achievement against each indicator, and in turn, all the indicators together should be telling you about how far you have achieved the change your outcome sets out. So, more important than the indicator data itself, is what all your data is telling you about the extent of change that is happening (or not), how and why this is happening and what it might tell us about the effectiveness of the approaches you have used or other factors involved in this area of change. Please ensure that your analysis of achievement is clearly linked to the outcome and the evidence from your indicators. If you have not seen the achievement expected for any of the indicators (or have seen far greater progress than expected) please explain why you think this might be.

Reporting against outcome numbers:

- **Numbers of people benefitting under this outcome <u>this year</u>:** please enter here the total number of people that have experienced a benefit or change in relation to the outcome as a result of your project during the past year. These numbers should be based on the information you have been gathering from across your indicators. Please disaggregate the total number into male, female or gender defined differently.
- Please only include the people from whom you have evidence that they have experienced a change. The number of people participating in your project activities (your project reach) can be entered in section 4. Here we want to know how many of those have actually experienced a change from participating.

- **Numbers of people benefitting under the outcome <u>since the project began</u>:** please enter here the total number of people that have experienced a benefit or change in relation to the outcome as a result of your project since the beginning of your project. In some cases this may just be the sum of the numbers benefitting from each year. However, if you are working with the same people year after year who are experiencing the same benefit each year, we would only expect them to be counted once in the numbers benefitting since the start of the project.

3.2. What other learning have you gathered from this grant? (2100 characters max)

Please tell us what else you have learned from the grant. This could be related to:

- The types of changes (expected or unexpected) emerging from your work or how those changes are happening
- lessons about your project's approach

Learning can come from many sources and may emerge from anecdotal evidence and experience (e.g. an informal conversation with a prominent decision-maker, or general observations made by project workers) as well as from your formal monitoring systems.

4. Numbers of people benefitting directly from your project

The aim of this section is to help both you and your Comic Relief grant owner keep track of the number of people benefitting directly from your project, both during the year and since the start of the grant, and how these numbers relate to your overall project targets.

4.1. Achievements against your targets - people benefitting directly.

Please complete the 'Description' and 'Overall project targets' columns (the grey boxes) with the information from your start up form - remember, please don't change this information.

People benefitting directly this year

- For each group you have listed, please state the total number of people that have benefitted directly from your project during the past year. These numbers should be related to the data you have from your outcome indicators i.e. they should be people who your data shows have actually benefitted (rather than just the number of people you have reached in your project activities which you can tell us in section 4.1). Please disaggregate your figures by gender in the appropriate columns.
- Please avoid double counting the same people either within groups or across groups.

People benefitting directly since the start of the project

- For each group you have listed, please state the total number of people that have benefitted directly from your work since the start of the project.
- This should be the overall number of *unique* beneficiaries i.e. as far as possible you should not repeatedly count the same people benefitting year after year.
- Please disaggregate these numbers by gender in the appropriate columns.

4.2. Diversity and hard to reach groups

You will first need to <u>copy the text from your start up form/last annual report</u> about which groups are under-represented in accessing or engaging with your project and what you planned to do to address this.

Please outline how successful you been across your grant in engaging under-represented or marginalised groups? (1500 characters maximum):

Please tell us about how, during the whole of your grant, you have been able to engage particular under-represented or difficult to reach groups and what were the key factors involved in being able to do this.

5. Project activities

Please insert details in the grey cells of what activities you planned for the year and the numbers you expected to reach with these activities from your last annual report. Please then tell us about what activities you did deliver over the year and the actual numbers reached with those activities in the right hand columns of the table.

We ask this not because we expect everything to be delivered exactly as planned. We recognise and value adjustments and adaptations to implementation according to changes in context and learning from experience. However, it is important for us to be able to see what might have changed from what was planned in order for us to understand the progress of your grant over the past year.

5.1. What (if anything) did you need to change and adapt from your original plans? (1800 characters max)

As noted above, we are equally interested in how you have adapted and developed your project over the year as we are about keeping track of what you have done. So we are interested to hear about why you made, or had to make, any changes in your planned activities and approach as this provides.

6. Budget

The guidelines for submitting your financial report are included on the annual report template itself, and in the guidance sheet on the first tab of the financial report template. You will need to download your last financial report from Salesforce, update it with this year's financial information and then upload it again to Salesforce along with your annual narrative report.

Please note that if there is unspent budget from your grant you will need to discuss this with your Comic Relief grant owner.

7. Communications and information products from your project

We would greatly appreciate it if you could share with us any awards, significant achievements, or case studies that you think would be useful for Comic Relief's marketing and communications (e.g. our film making or social media); and some examples of what a donation of, for example, £1, £5, £30 or £100 could buy in your project. Please note that this section is not specifically related to your progress towards your outcomes, but to specific examples and good stories that you think could make suitable material for Comic Relief's marketing and communication. Please note that we will not be able to use all of the information you provide but hope it will also prove helpful for your own marketing and communications.

7.1. Case study: Real-life example of a person helped (2100 characters maximum)

Comic Relief aims to use a few real life examples from a small selection of our projects in our marketing and communications materials: internally, and with our corporate partners and the general public. Please provide us with a case study which highlights the difference your work has made to someone's life. Provide a concise story, including a brief background to the issue/need you have addressed, how and why the project helps and the result of this.

Please only provide a case study if you are happy for us to use it in the ways described above and/or for us to contact you and follow this up (note we understand this is an illustrative example and do not necessarily need to follow up with the individual person whose experience is described in the case study). We are looking for case studies which:

- Provide a compelling story of change, highlighting the difference the project makes.
- Involve a relatively simple and straightforward journey of change.
- Be communicable to the general public who are unlikely to understand much about the issue or how it can be solved.

Please write the case study in a way which does not require prior knowledge of the issue or approach to solving it. You may need to simplify the details of what actually happened and miss out some details, to prioritise the key changes within the word limit. The case study should include:

- Brief background to the issue/need (why the project is needed).
- How the project helped (for example, how a person took part in the project).
- The result or what has changed.

For example, a beneficiary case study would provide a short story of the problem that a person was having/experiencing, how they came to the project, how the project helped and what their situation is now. Whilst we understand people's lives and needs are complex, the aim here is to provide us with a compelling case study of why your work is vital to that person's life.

Please include at least one direct quote from this person as part of the case study.

7.2. Are we able to speak to this beneficiary or someone with a similar story directly?

We may want to contact you to follow up with the individual person whose experience is described in the case study (ideally) or someone like them. In this situation we would contact you in the first instance to discuss this possibility and what it would involve. Please tell us if this is possible.

7.3. What our funding could buy

One of the ways in which we try to raise money for projects like yours is to show the public how the money they donate can make a real difference to people's lives.

Please give at least 3 examples of what any of the amounts listed have paid for in your project (or will pay for in the next year). For each example, choose an amount listed in the table provided (or add an 'other' amount) then simply state the item or activity that the amount can buy, who benefits from this purchase or why buying this item or running this activity is important.

It is important that the examples you provide relate directly to work that Comic Relief is funding (rather than other work your organisation delivers). It should relate to something you already spend money on (or will be spending money on soon). We call these examples 'money buys'.

Tips:
- The best 'money buys' show how a donation could meet an immediate need or make a real difference to the lives of your beneficiaries.
- Please bear in mind that we may use these examples for public fundraising activities. Think about statements which would convince you to donate your money.
- You do not need to complete all of the examples, just use those which work best for your project and any different amounts of money you believe are more relevant.
- If this is your second annual report, please, where possible, specify different 'money buys' to your first annual report or specify the same examples if you believe they are the most relevant.

Examples of what we are looking for:
> *'Just 70p could buy a hot meal for one child living on the streets of Kampala in Uganda'*
> *'£25 pays for a bereavement session for an older person who has just lost a loved one.'*

7.4. Did you or your partners receive any special recognition this year (e.g. awards)? (600 characters max)

Please share with us information relating to any awards, accreditations or special endorsements you received in the past year as a result of your work.

7.5. Please provide links to any key learning resources, videos, blogs or reports that you have produced about your project this year

If you have any developed any information resources or communications products (e.g. research report, policy brief, video etc.) about your project please tell us about these here, and please provide a website link if you have one. Please submit any significant new resources/products along with this report. This will help us keep track of your achievements and we may ask to share or use this material in other ways in the future (for instance to communicate the impact of our funding) and we may also be able to tell other Comic Relief grant holders about it if it is relevant to them. For this reason we need a brief description of the resource so that we can easily identify who it might be useful for and to know if it is publically available and easily accessible.

7.6. Social media

Please share with us any social media channels that you use for your project (e.g. Facebook page, Twitter account etc.). Also, please update us on any social media campaigns you are planning in the coming year.

8. Keeping us informed

8.1. Is there anything you need to notify us about in relation to your organisation and this project?

We understand that over the lifetime of any grant you're likely to encounter a range of unexpected issues. As part of our Conditions of Grant we ask grant holders to let us know immediately when significant issues arise, so we can work to support you. You should do this as soon as issues come up. However, at each reporting stage, we also ask all grant holders to answer the simple questions in this section to ensure significant issues aren't missed.

Comic Relief has a lot of experience in supporting grant holders through changes and challenges so there may be ways we can help you minimise the effect these changes have on your grant. If you let us know anything which we need to follow up on, then your Comic Relief grant owner will get in touch with you.

9. Feedback on us

9.1. Please tell us about any areas of your relationship with Comic Relief that have worked well and any that have worked less well and could be improved (max 1800 characters)

We are very aware that grant holders put a lot of effort and time into preparing these annual reports to Comic Relief. We also want to provide you with the opportunity to feed back to us on any interactions (positive and negative) that you have had with Comic Relief so that we can continually improve our approach to supporting the work of our partners. In this final report for your grant please let us know your reflections on how you feel your relationship with Comic Relief has been, what we could improve in our management of our grants or anything else related to how we have interacted with you over the course of the grant.