

Annual report form guidance notes: Level 3

These guidance notes are designed to support you in completing your annual 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.

The annual report should be completed every year of the grant. These reports allow you to reflect on your progress and challenges over the year, share your learning with us and tell us your plans for the next year based on this experience and learning. We also ask you to submit your financial report for the year (using the Comic Relief template) alongside this narrative annual report.

Annual report process

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

- To check we have the information we need to understand your progress to date and for our marketing and communications needs and that all sections are completed clearly in accordance with these guidance notes.
- To see if you are broadly on track and where you are not, to understand why and understand your plan to address this.
- To ensure you have a sound plan for the next 12 months in light of your overall purpose and targets for 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 word limit. Please do not exceed this limit. Equally, do not feel you have to fill up the word 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 words, 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 the reporting period

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 is working and, just as importantly, what is not working. 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 are adapting 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 are on track with your overall aims and plans for your project (400 words 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 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.

- 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 (150 words max) and the weaknesses and challenges you have faced (150 words max) as well as how you will build on or address these in the coming year.
- Looking ahead to the next 12 months, share with us any new opportunities (150 words max) and threats/ risks (150 words max) you have identified for your project and what actions you will take to capitalise on those opportunities and mitigate those threats/risks.

When thinking about opportunities and threats/risks, you should consider both internal factors (what's happening within the project and within your organisation) and external factors (changes in the environment in which you're working). Opportunities might include changes or developments in local or national government strategies or policies that will provide you with an opportunity to raise awareness of the issues you are working on, or new partnership opportunities to benefit the scale or quality of your project. Threats / risks might include potential delays in hiring new project staff, or local natural or manmade disasters that might severely affect your beneficiaries and how they engage with your project, or planned changes in government policies that make it harder for you to deliver your work.

2. What is changing as a result of your work?

2.1. Progress towards outcomes

This section is for you to provide more detailed information and reflections on your progress towards the achievement of your outcomes, and what your data is telling 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. Early on in your project it may, therefore, be difficult to identify significant changes occurring from your outcome data, but we would expect you to be explaining any significant under or over achievements in terms of your outcomes and indicators.

For each outcome table:

Please insert into the grey cells the outcome statements, indicators, baseline and planned targets/changes expected, as specified in the latest version of your start-up form. Please do not change these or add anything new (you can request to change or amend indicators and outcomes for the future in section 2.3 but for this report you should use those already agreed with Comic Relief).

Reporting against number-based (quantitative) indicators:

- **Numbers benefitting this year:** this number represents the number (of people or things e.g. policies, institutions) who have experienced a benefit or change in relation to the indicator as a result of your project during the past year. In most cases this will be the **additional** number above the baseline figure who have achieved the indicator. For example an indicator might be '*Number of young people enrolled in education*' and your baseline at the start of the project is that 200 of the young people you are targeting are enrolled in education. At the end of year one you find that 300 young people are enrolled, so 100 extra young people have enrolled over the year i.e. the numbers benefitting would be 100.
- If your indicator refers to things rather than people, just fill in the 'Total' box. If your indicator refers to (or can be translated into) numbers of people, then please split the total in males (M), females (F), and, if appropriate, gender defined differently.
- Please only include numbers for whom you have evidence that they have experienced a change. The numbers involved 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 that involvement.
- **Numbers benefitting since the start of the project:** this number represents the total number (of people or things) that have experienced a benefit or change in relation to the indicator 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.

Reporting against narrative-based (qualitative) indicators:

- **Progress this year:** please provide a narrative summary of the progress made towards the change you expect to see for each of your indicators (maximum 100 words for each indicator). We are expecting details of the *changes* you are seeing, not just a description of the activities you have delivered.

Looking at the data you have across your indicators, what has been the progress towards this outcome and what does this tell you about the effectiveness of your approach? (300 words max)

Your data should be telling you about your progress against each indicator, and in turn, all the indicators together should be telling you about how you are progressing towards 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 mean for how you move forward with your approach. Please ensure that your analysis of progress is clearly linked to the outcome and the evidence from your indicators. If you are not seeing the progress expected for any of the indicators (or have seen far greater progress than expected) please explain why you think this might be.

2.2. What other learning have you gathered? (250 words max)

Please tell us what else you have learned over the past year. 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
- lessons about practical issues of project planning, management or processes

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.

2.3. Are there any changes that you want to make to your outcomes or indicators (please provide a clear rationale for any proposed changes)? (300 words max)

If you need to revise any of your existing outcomes, add an outcome, or change your indicators, please use this section to explain what changes you would like to make and why. It is important that there is a clear rationale for the proposed changes so we can decide whether we can approve these changes. For example, poor performance of project delivery for reasons within the project's control should not be used to lower original targets or remove indicators. However, if it turns out data for an indicator is impossible to collect, or that you have realised an indicator is not actually relevant in your context or the wording needs to be tweaked to be clearer, then we can discuss this and help to ensure you have the most useful set of indicators and outcomes for your project. Please note we would not expect you to be removing whole outcomes as this would imply a significant shift in the focus of the project we have agreed to fund.

2.4. Please respond to any additional questions or requirements for your grant

If your Comic Relief grant owner has sent you any specific questions or asked for further information, please respond in this box.

3. 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.

3.1. Progress 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.

3.2. Diversity and hard to reach groups

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

How successful have you been in the past year? Which groups are under-represented in accessing or engaging with your services and how do you plan to address this in the next 12 months? (250 words maximum)

- Please reflect on your plan and tell us if this has been effective, providing any data you may have on these groups' engagement with your project.
- In this section, we are also looking for you to tell us about any groups more recently identified as being under-represented in accessing or engaging with your work - groups you did not previously identify in your start-up form or previous reports to us.
- Please outline your plan to ensure your project is reaching these groups in the next year.

4. Project activities

4.1. Have you delivered what you planned in the past year?

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 start up form (if this is your first annual report) or your last annual report (if you are reporting on year two or later). 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.

4.2. What (if anything) did you need to change and adapt from your original plans? (300 words 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 useful learning both for you and for your Comic Relief grant owner.

4.3. What activities do you plan to carry out over the next year?

Please provide us with up to ten key activities that you plan to do over the next 12 months of your project. Together, these activities should provide a summary of your delivery plan. These should describe the main components of your work that are integral to being able to achieve your outcomes (e.g. training sessions, development of guidelines or publications, meetings with key decision-makers, counselling provision, community forums etc.). We are not looking for project administration/management activities such as recruitment of staff, establishment of project office, purchase of materials etc.

For each activity please provide a clear description of what it is and who it is with, as well as any target for that type of activity (e.g. 5 training sessions on inclusive teaching approaches with teachers).

Please also tell us the number of people you intend to reach in each activity, e.g. how many people will participate in the training sessions or the forums that you hold. This will give us a good sense of the scope and scale of your project activities.

If over the past year what you delivered varied significantly from what was planned (as explained in 4.1 and 4.2 above), we would expect the learning from this to be reflected in your planned activities for the year ahead.

5. 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 GEM, update it with this year's financial information and then upload it again to GEM along with your annual narrative report.

5.1. FOR UK PROJECTS ONLY: If you are based in the UK and are using part of the grant to pay for salaries, please confirm by placing an 'X' in the box to the right, that you are aligned with the latest Living Wage rates (www.livingwage.org.uk) in calculating these salaries

Comic Relief is a Living Wage Friendly Funder so we encourage all sessional costs and salaries for UK projects to be calculated at real living wage rates. These rates are updated annually by the Living Wage Foundation and can be found at the link above.

6. 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.

6.1. Case study: Real-life example of a person helped (350 words 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 don't use real names or any identifiable details (addresses, school details, phone numbers etc.).*

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.

If you would prefer to send a video please use a link to the video rather than sending us a data file.

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

6.2. 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.'

6.3. Did you or your partners receive any special recognition this year (e.g. awards)? (100 words 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.

6.4. 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.

6.5. 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.

7. Keeping us informed

7.1. 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.

8. Feedback on us

8.1. 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 300 words)

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.