

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

**Annual Report 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 Annual Report Form.**

It will help us to:

- reflect on the previous 12 months, to celebrate achievements and reflect on challenges

- discuss with you how these may impact your future plans

We also ask you to update your budget which helps us to:

- understand more about your work with this funding, as well as the environment in which you're working

We hope these reports will help you to:

- demonstrate and celebrate your achievements

- discuss with us any challenges you are facing and how we can work together to address them

- ask any questions

Finally, we also ask you to complete a short 'Keeping Us Informed' checklist as part of the agreed conditions of funding.

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.

|  |
| --- |
| 1.1 This is what you previously said you would like to do with the funding (from your Funding Overview Form:  *(most recent taken from SF)*  This is how you described the main opportunities for this work over the grant period, both inside and outside your organisation.  *(most recent taken from SF)*  This is how you described the main challenges for this work over the grant period, both inside and outside your organisation.  *(most recent taken from SF)*  Reflecting on these, please give us an overview of what has happened over the past year. For example, do you feel you've been able to deliver on the plans as intended? What impact have the opportunities and challenges had? (max. 2400 characters, approx. 400 words) |
|  |

1. **Your ambitions for this funding**

The questions in this section will help us to reflect on your ambitions for this funding that you shared at the start, as well as how you feel you are progressing towards your vision of success. We may use your outcomes to support communication about our own impact.

|  |
| --- |
| 2.1 Here are the most recent outcomes (changes you wanted to see as a result of this funding) and indicators (the information you are using to understand if these changes are happening) that you have shared with us:  *(taken from FOF or last annual report on SF)* |

|  |  |
| --- | --- |
| Change you would like to see (Outcome) 1 | |
| *(most recent taken from SF)* | |
|  | Sign that this change is happening (Indicator) |
| 1a | *(most recent taken from SF)* |
| 1b | *(most recent taken from SF)* |
| 1c | *(most recent taken from SF)* |
| Please explain what change is happening for this outcome, referring to your indicators where possible. (max. 1800 characters, approx. 300 words) | |
|  | |

|  |  |
| --- | --- |
| Change you would like to see (Outcome) 2 | |
| *(most recent taken from SF)* | |
|  | Sign that this change is happening (Indicator) |
| 2a | *(most recent taken from SF)* |
| 2b | *(most recent taken from SF)* |
| 2c | *(most recent taken from SF)* |
| Please explain what change is happening for this outcome, referring to your indicators where possible. (max. 1800 characters, approx. 300 words) | |
|  | |

|  |  |
| --- | --- |
| Change you would like to see (Outcome) 3 | |
| *(most recent taken from SF)* | |
|  | Sign that this change is happening (Indicator) |
| 3a | *(most recent taken from SF)* |
| 3b | *(most recent taken from SF)* |
| 3c | *(most recent taken from SF)* |
| Please explain what change is happening for this outcome, referring to your indicators where possible. (max. 1800 characters, approx. 300 words) | |
|  | |

|  |  |
| --- | --- |
| Change you would like to see (Outcome) 4 | |
| *(most recent taken from SF)* | |
|  | Sign that this change is happening (Indicator) |
| 4a | *(most recent taken from SF)* |
| 4b | *(most recent taken from SF)* |
| 4c | *(most recent taken from SF)* |
| Please explain what change is happening for this outcome, referring to your indicators where possible. (max. 1800 characters, approx. 300 words) | |
|  | |

|  |  |
| --- | --- |
| Change you would like to see (Outcome) 5 | |
| *(most recent taken from SF)* | |
|  | Sign that this change is happening (Indicator) |
| 5a | *(most recent taken from SF)* |
| 5b | *(most recent taken from SF)* |
| 5c | *(most recent taken from SF)* |
| Please explain what change is happening for this outcome, referring to your indicators where possible. (max. 1800 characters, approx. 300 words) | |
|  | |

|  |
| --- |
| 2.2 Please tell us if there any revisions you would like to make to each outcome or indicator. You can archive outcomes that you feel are no longer relevant or need to be changed and replace this with a new outcome. We will discuss these changes with you. You will be able to still see these outcomes once they have been archived. |

|  |  |
| --- | --- |
| Revisions to wording of Outcome [number] | |
|  | |
|  | Revisions to indicators |
| No. a |  |
| No. b |  |
| No. c |  |
| Please briefly explain why you’d like to make these revisions. (max. 1200 characters, approx. 200 words) | |
|  | |

|  |
| --- |
| 2.3 These are the main activities you plan to deliver to create the changes (outcomes) you'd like to see, as you stated at the start of your funding period. (If you have flexible core funding, you may have described the broader organisational functions you'd like to support.) |
| *(taken from FOF on SF)* |
| Please use the text box below to reflect on your progress against these in the last year.  For example, were you able to deliver these activities as planned? Were there any challenges and how did you overcome them? Will you make any revisions based on this experience? If you have already explained some of this in the outcomes boxes above, you don’t need to repeat the same things here. (max. 2400 characters, approx. 400 words) |
|  |
| Please outline what activities you have planned for the year ahead. (max. 2400 characters, approx. 400 words) |
|  |

|  |
| --- |
| 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.  These are the main target groups that you told us you expect to **directly** benefit from this work. |
| *(most recent taken from SF)* |
| If you would like to make any revisions to this, eg. if there are any other target groups that are also **directly** benefitting from your work, you can make revisions here. You can archive target groups that you feel are no longer relevant and add new target groups if required. We will discuss these changes with you. You will be able to still see previous target groups once they have been archived. |
|  |
| 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’*   Please tell us **how many new people directly benefitted from this funding in the past 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 are 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 1,000 people have benefitted from your organisation's work over the past year, and Comic Relief funding accounted for 30% of your organisation's income over the past year, you can say that 300 people have benefitted.  We understand that, in your work, there may be lots of people who 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. |
|  |
| How have you reached this number, and would you be able to provide evidence of it (if required at a later date)? (max. 900 characters, approx. 150 words) |
|  |
| 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.  These are the people indirectly benefitting, groups or other stakeholders that you told us you expect to be impacted by your work, and why they are important. You don’t need to report how many of these people or groups the work has reached, but you may want to mention it in your responses about your outcomes and indicators. |
| *(most recent taken from SF)* |
| If you would like to make any revisions to this, eg. if there are any other people indirectly benefitting, target groups or other stakeholders that are being reached by your work, you can make changes here. You can archive people indirectly benefitting target groups that you feel are no longer relevant and add new target groups if required. We will discuss these changes with you. You will be able to still see previous target groups once they have been archived. |
|  |

|  |
| --- |
| 2.5 At the start of your funding, we asked you to complete a budget template for your intended use of your Comic Relief funding, to support our collaboration with you.  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.  Please use the text box below to give a short summary overview of the year's financial position for the funding, explaining any major variances from the budget and the rationale behind any major revisions to future years' budgets for our review and approval. (max. 1500 characters, approx. 250 words) |
|  |
| 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. |

|  |
| --- |
| 2.6 FOR UK FUNDING ONLY WHERE COMIC RELIEF FUNDS ARE SUPPORTING STAFF SALARIES:  Comic Relief is a [Living Wage](https://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.  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. |
|  |

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.

|  |
| --- |
| 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) |
|  |

|  |
| --- |
| 3.2 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, eg. ongoing management and support of your funding, contact with us, experience of hosting any Comic Relief visits or taking part in filming/media work. Do you have any suggestions of things that Comic Relief could do that would make things even better? (max. 1500 characters, approx. 250 words) |
|  |

If there’s any other feedback you’d like to share with us anonymously, you can use this [link:](https://form.typeform.com/to/NAoXZpE3) <https://form.typeform.com/to/NAoXZpE3>

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.

|  |
| --- |
| 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 ask you to respond to the following question:    ‘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   Please use the text box below to explain your answer. What could we do that would make you increase this score next year?  We will use this information to improve our funding practice (how we make decisions about, allocate and manage our funding).  (max. 1500 characters, approx. 250 words) |
|  |

We would like to ask you about ‘Money Buy sentences’ and ‘story headlines’ to help us identify content which we may use in our communications channels (eg. email, website, social media, print etc.) where we reach the British public. Not only do we want to shout about the incredible work you’re doing, but we know that it really motivates donors to give more when we can promote awareness of what their donations support.

Please note, you only need to provide this information if you feel it is appropriate to your work. (If you feel it is not appropriate, please say so in your responses and explain why.)

|  |
| --- |
| 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’, please provide one or more ‘Money Buy sentence/s’ in the space below, which we may use 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’   (max. 1500 characters, approx. 250 words) |
|  |

|  |
| --- |
| 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, please provide it here. 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. Please write 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 |
|  |

**Keeping Us Informed Checklist**

We understand that over the lifetime of any funding you’re likely to encounter a range of unexpected issues.

As part of our conditions of funding we ask funded partners 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, every six months, we also ask all funded partners to answer the simple questions below to ensure significant issues aren’t missed.

Comic Relief has a lot of experience in supporting funded partners through changes and challenges so there may be ways we can help you minimise the effect these changes have on your funding. If you flag anything which we need to follow up on, then your Comic Relief Portfolio Manager will get in touch.

|  |  |  |
| --- | --- | --- |
| Statement | Yes | No |
| Is there any information in your original application, forms or discussions which is no longer accurate? |  |  |
| Has your organisation experienced any negative publicity? |  |  |
| Has anything happened which is likely to lead to significant negative publicity? |  |  |
| Are you aware of any allegations or suspicions that any part of your funding has been misused? |  |  |
| Have there been any changes to your organisation’s finances or financial position (or those of any partner organisations in this funding) which could impact on to the delivery the funded work? (for example, loss of important income source, deficit in previous financial year, unexpected costs incurred) |  |  |
| Have there been any significant changes to key staff working on this funding (particularly where the post/s are funded by Comic Relief)? |  |  |
| Have there been any changes to your Trustees or your senior management team? |  |  |
| Has there been a change of auditors? |  |  |
| Have there been any changes to your organisation’s business plan, strategy, or objectives? |  |  |
| Have legal proceedings been instigated against your organisation or any partner organisations in this funding? |  |  |
| Have there been any safeguarding concerns arising from your staff, volunteers, operations or the communities you work with? |  |  |
| Have there been any safeguarding concerns reported to you by your partners (or grantees if you are making grants using Comic Relief funding)? |  |  |
| Have you made any serious incident reports to statutory regulators (for instance, to the Charity Commission, Registrar of Companies, Office of the Scottish Charity Regulator, Information Commissioner’s Office, the Fundraising Regulator or any other regulator)? |  |  |
| For any statements where you have ticked ‘yes’, please briefly explain what has happened. (max. 1500 characters, approx. 250 words) | | |
|  | | |

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.