

Serious Incident Reporting Form

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To be completed as soon as possible after a serious incident is identified.

1. Basic Information

- **Date of report:**
 - **Person reporting the incident:**
 - **Role/Position:**
 - **Contact details:**
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2. Nature of Incident

Please tick the type(s) of incident involved (you may select more than one):

- Safeguarding concern (e.g., abuse, neglect, exploitation)
- Fraud or theft
- Serious harm to staff, volunteer, or beneficiary
- Data breach or cyberattack
- Criminal offence or investigation
- Financial loss or misuse of charity funds/assets

- Governance failure or misconduct
 - Reputational risk
 - Other (please describe):
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3. Summary of the Incident

- **Date and time of incident:**
 - **Location of incident:**
 - **Who was involved? (include names and roles if known):**
 - **Description of what happened (factual and objective):**
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4. Immediate Actions Taken

- Describe what steps have been taken so far to manage the incident and reduce harm or risk:
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5. Is Anyone at Ongoing Risk?

- Yes
- No
If yes, explain who is at risk and what is being done:

6. External Reporting

Have any of the following authorities been informed?

Authority	Yes/No	Date Reported	Reference/Contact Person
Charity Commission			
Police			
Local Safeguarding Board			
Information Commissioner's Office (ICO)			
Funders or Insurers			
Other (please specify)			

7. Further Action Needed

What follow-up actions are planned or recommended (e.g., investigation, trustee meeting, legal advice)?

8. Report Prepared By

- Name:

- **Position:**
 - **Signature:**
 - **Date:**
-

9. For Internal Use Only (Trustees/Designated Lead)

- Is this incident reportable to the Charity Commission? [] Yes / [] No
- If yes, date reported:
- Action taken by trustees or designated lead:
- Date reviewed/closed:
- Notes: