



Annual Activity Report

Sample template for Small/"Volunteer only" organisations¹

Introduction

The purpose of an annual activity report is to outline in a simple and straightforward way to the reader why and when the organisation was set up, the resources available to it, how these resources have been used and what has been achieved as a result of its activities, how it is governed, how effective it is in achieving its objectives, the challenges it is managing and its future plans.

The annual report represents a real opportunity for small organisations in the not-for-profit sector across Ireland to tell their story and showcase its transparency by outlining its performance, governance, culture and financials. An annual report can provide a comprehensive picture of an organisation, as well as its achievements and future plans rather than meagrely meeting minimum compliance requirements.

An annual report, when prepared with care and attention, serves to reinforce relationships with stakeholders and build relationships with the public, potential donors, employees, volunteers and supporters.

Purpose of the template

This template is for guidance only and sets the relevant and necessary information considered to be good governance practice for the annual activity report for a small/"volunteer only" (Category 1) organisation with an annual income of less than €50,000. We recommend that you follow the 6 section format as set out in the template. How the report actually looks like will be unique to you, its story is your story and ideally it will contain photos of and testimonials from your trustees, service users and volunteers. It is necessary for it to be signed and dated by at least two Trustees/Directors, usually the Chairperson and Treasurer. The template aims to be a useful and practical support for you when deciding what you need to include and reference when writing your organisations report. The board of each organisation needs to determine what it believes to be appropriate and proportionate for its organisation's annual report bearing in mind its size, resources, legal requirements and any specified requirements of its funders and members.

The Good Governance Awards

The Good Governance Awards aims to support and encourage the Community, Voluntary and Charities (CVC) sector to use their annual reports and financial statements to showcase their embracement of and adherence to good governance. The Awards have been developed by the Carmichael and is supported Boardmatch, Charities Institute Ireland, Dóchas, Enclude, Volunteer Ireland, The Wheel, 2into3, Davy, the Governance Company, Mason Hayes Curran, Mazars and Pobal.

¹ This template was developed by the Carmichael and the Kerry Volunteer Centre as an aid to smaller nonprofit organisations (annual income less than €50,000) and to provide guidance on the content of an annual report.

Section 1: About your organisation

Front/cover page

Organisation Name:

Insert the official (legal) name of your organisation

Title: Annual Activity Report

Reporting Period:

What period does the report cover? For example, 1 January 20XX to 31 December 20XX

Organisation Address (registered office) and contact details: *(if applicable also include the organisation's website, Facebook, Twitter, etc. details):*

Company number *(if applicable):*

Charity Registration Number *(if applicable):*

Charity number (CHY) *(if applicable):*

Logo *(if applicable):*

Section 2: Our story

Summary of the organisation's purpose and activities

Purpose

Describe (briefly) why your organisation exists and what it sets out to achieve – its purpose. Use language that makes sense to your stakeholders (your beneficiaries, volunteers, staff, funders and supporters) and the wider community.

You should also give a short summary description of your key objectives (what you hope to achieve) and the main activities (what you do) that the organisation undertakes in relation to your purpose and key objectives.

The idea is to give the reader an overview, more specific detail on objectives and activities will be given in Section 4.

Chairperson's and Treasurer's Statements

You might consider including a short statement from the Chairperson and the Treasurer of the organisation. The Chairperson's statement will set out an overview of the year in terms of key successes/achievements and challenges, may reference and thank supporters, funders, volunteers and staff and identify the challenges experienced during the year, refer to any upcoming challenges/risk that you expect to encounter going forward and their statement may also outline plans for the year ahead.

The Treasurer's statement will provide an insight into your organisation's income and expenditure. It may give an overview of the types of fundraising undertaken and how the monies raised were used. The statement may thank sponsors, donors and services received at reduced cost or/and pro bono.

Specific details on your finances will be outlined in Section 5.

Section 3: Structure, Governance and Management

Organisation and governance

In section 3, you have the opportunity to let the reader learn about how your organisation is governed and managed. It allows you to introduce the reader to your Trustees/Board members and staff (volunteers and/or employees).

Begin with an outline of your organisation's structure. State whether your organisation is an unincorporated association, a company limited by guarantee, and/or a charity². If it is a company and/or a charity, then proceed to give details of the Directors/Trustees.

Trustees, Board Directors/Committee members:

Who are the Trustees/Board Directors that govern and run the organisation? The annual report needs to set out the following details;

- A list the names of each of the Trustees/Directors. It addition, it needs to specify who the officer holders are - e.g. chairperson, treasurer, secretary)
- You should describe how people are elected or nominated to be Trustees/ Directors and the term of office of Trustees/Directors and Officers.
- Give details of the role of the board, the number of meetings held and the attendance by each board member.
- If the organisation has any sub-committees (e.g. finance or fundraising), the report needs to provide details of the name of the committee, what it does and who serves on the sub-committee, the number of meetings held and the number of meetings attended by each member
- Details of how you manage risk and conflict of interest needs to be outlined.

Governance Standards

If the organisation has adopted/or is planning on becoming compliant with the Charities Governance Code and/or other Best Practice Codes & Quality Standards such as the Fundraising Principles, this should be stated in this section of your Annual Report.

Staffing

Provide details of the roles and the number of individuals who volunteer and/or are employed with the organisation during the reporting period. It is useful to give details as to the support and guidance provided to staff, for example, training and/or volunteer/employee policies you have in place. Let the reader know how volunteers are recruited and if you need more volunteers, how can people signed up with your organisation.

² If your organisation is a registered charity, then those who are responsible for the governance and oversight of the organisation are the charity's trustees and need to be registered with the Charities Regulator. If your organisation is a company limited by guarantee (CLG), then those who are responsible for the governance and oversight of the organisation are the company's directors and must be registered with the Companies Registration Office (CRO). If your organisation is not a charity or a company, then you are most likely to be an unincorporated association and those who are responsible for the governance and oversight of the organisation are the committee members. However, you might be a cooperative which has a different structure and rules and this template is not designed to meet the specific reporting requirements of co-ops. It is possible for your organisation to be both a registered charity and a registered company or to be a charity and an unincorporated association. This template has been designed for registered charities and companies, and will refer to Trustees and Directors but it can be used by unincorporated associations for their annual report.

Section 4: Objectives, Achievements and Performance

Main Objectives pursued during the reporting period

Commentary on the year

Describe the organisation's year. - What went well? What had you planned to do but were unable to?

Objectives³ for the year:

Objective 1:

Objective 2:

Objective 3:

Key Achievements and Outputs⁴ for the Reporting Period

1.

2.

3.

Beneficiaries⁵ (who the organisation serves and supports)

Does your organisation provide services to individuals or groups or both. Number of individuals or groups (if groups, the number of individuals overall). What feedback do you receive e.g. from your beneficiaries, funders, supporters, the wider community? Consider including some photos and customer testimonials to provide some flavour of the year.

Challenges

What challenges or difficulties did you face and how have you addressed them.

³ Objectives; The areas of activity or practical steps planned by the organisation in order to accomplish its aims.

⁴ Outputs; Details of the type and number of products, services or facilities that result from the organisation's activities.

⁵ Beneficiaries; A person or group of persons who benefit from the work of the organisation. Beneficiaries may sometimes be called clients or service users.

Section 5: Finances – income received and monies spent

In this section, you expand on the Treasurer's statement and give the specifics of your finances in an open and transparent manner. As such you will need to;

1. Set out what income the organisation received during the reporting period and break it down by source or type of income. If you received money from any statutory source (e.g. Local Authority, HSE, State Agency, Govt Dept etc.) you must provide details of this in your financial statement.
2. Set out what you spent during year by type of expenditure
3. State what the net position of the organisation is at the end of the year in terms of accumulated reserves or cash on hand. If the organisation is in a deficit position you will need to provide a note on how this deficit happened, how it is being financed (e.g. by way a loan) and what the organisation's plans are to eliminate or reduce the deficit in the coming year(s).

Summary of financial position	Current Financial Period (€)	Previous Financial Period (€)
(1) Sources of Income For example; <ul style="list-style-type: none"> • Grants (list each of the granting organisation and amount of each grant received) • Donations & Sponsorship (public, corporate, philanthropic) • Fundraising • Trading or Commercial Activities (if applicable) • Other income sources e.g. membership fees 		
(2) Main Expenditure Items For example; <ul style="list-style-type: none"> • Salary and Wages (including taxes and pension payments) • Office & premises rent • Insurance • Lighting & heating costs • Professional fees • Board/committee expenses • Costs related to trading or commercial Activities (if applicable) • Administration • Other Activity costs 		
(3) Net position – Surplus or Deficit funds at year end		

Balances Brought Forward:

Accumulated – Surplus or Deficit from previous Year(s) -

€

€

Net overall Financial position @ end of year in Review -

€

€

Section 6: Future plans

Future plans

As a concluding section of the annual report you will provide details of your plans for the coming year and future years to meet the organisation's ongoing objectives and support to its beneficiaries. What do you want to achieve? What new things will you do or do differently? For example,

- Will you provide more services and/or any new services?
- What new targets or goals are you setting for the coming and future years?
- Will there be any changes to who you serve/support?
- Will you try to increase your volunteers, members or staff?
- Will there be any changes to how you are governed and managed?
- Will you look at how you are funded?
- Will you improve your communication with your beneficiaries /stakeholders - How?
- Will you improve overall efficiency/effectiveness – what are steps/actions to be implemented
- What additional changes you aim to achieve that can be attributed to your work

Detail at the end when the Annual Activity Report was approved by the Trustees and make sure that it is signed by two members of the board/management committee (usually the Chairperson and the Treasurer)