

## Annual Activity Report

### Sample template for Small/“Volunteer only” organisations<sup>1</sup>

#### Introduction

The objective of the annual activity report (the report) and accounts is to provide information about an organisation’s activities, its financial performance and financial position that will be useful to a wide range of stakeholders in assessing the board/committee’s stewardship and management of the organisation’s resources and funds, and to assist the reader of the report to make decisions in relation to the organisation. Although past, current and potential funders, donors and financial supporters of a not-for-profit organisation are the primary audience for the information contained in an organisation’s report, the preparer should also be aware that interest in this information may also extend to an organisation’s service users, other beneficiaries, volunteers and staff (current and potential).

The report should not be viewed simply as a compliance requirement or a technical exercise. The report should help users of the information to understand what the organisation is set up to do, 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 and its future plans.

#### The Good Governance Awards

The Good Governance Awards seek to acknowledge, encourage and promote good governance practice particularly in the area of annual reports.

The Awards have been developed by the Carmichael with the support of Boardmatch, Charities Institute Ireland, Dóchas, Enclude, Volunteer Ireland, The Wheel, Davy, the Governance Company, Mason Hayes Curran and Mazars Ireland.

The annual report represents a real opportunity for organisations in the not-for-profit sector across Ireland to showcase its transparency and trust 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 serves to reinforce relationships with stakeholders and build relationships with the public, potential donors, volunteers and supporters. As such, the Good Governance Awards aims to support and encourage the CVC sector to use their annual reports and financial statements to showcase their embracement of and adherence to good governance.

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<sup>1</sup> This template was developed by the Carmichael and the Kerry Volunteer Centre as an aid to nonprofit organisations and to provide guidance on the content of an annual report and financial statements.

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## Purpose of this template

This template is for guidance only. It sets out what the Good Governance Awards consider to be good governance practice for the annual activity report for a small/“volunteer only” (Category 1) organisation. The board of each organisation needs to determine what it believes to be appropriate for its organisation’s annual report bearing in mind its legal requirements and any specified requirements of its funders and members.

### Front/cover page

**Organisation Name:**

**Title: Annual Activity Report**

**Reporting Period:**

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

Company number *(if applicable):*

Charity number *(if applicable):*

Charity Registration Number *(if applicable):*

Logo *(if applicable):*

### Summary of the organisation's purpose and activities

The organisation's purpose or mission is central to its reason for existence. Therefore, as a communication device to stakeholders and other interested parties, the annual report<sup>2</sup> should clearly set out the organisation's purpose as set out in its governing document, its key objectives and the main activities it undertakes in relation to its purpose and key objectives

Best practice annual reports will provide this information in a way that is easily understood and will also provide insightful commentary on the organisation's broader environment and the implication this has on the organisation's purpose and objectives.

### Organisation and governance

Provide details of the organisation's legal structure. For example is it an unincorporated association, a company limited by guarantee and/or a charity.

Describe how people are elected or nominated to the board/management committee and the term of office of members.

#### **Board/Committee members:**

List the name of each of the management committee /board members also specifying the officer holders – e.g. chairperson, treasurer, secretary)

Details of the role of the board/management committee and its subcommittees (if applicable)

#### **Fundraising**

If relevant, describe the organisation's fundraising activities. If the organisation has signed up to the Statement of Guiding Principles for Fundraising this should be stated in the Annual Activity Report.

#### **Governance Standards**

If the organisation has adopted/or is in compliance with the Governance Code and/or other Best Practice Codes & Quality Standards this should be stated in the Annual Activity Report.

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<sup>2</sup> The term "annual report" for the purposes of the Good Governance Awards, covers an organisation's Annual Activity Report and Financial Statements. For organisations that produce separate annual activity reports and financial statements, both documents need to be submitted to ensure that all areas of assessment areas are taken into account.

### Main Objectives pursued during the reporting period

*State your organisation's key objectives, your beneficiary groups, key achievements, outcomes and outputs of the organisation in the reporting period<sup>3</sup>. Provide some comparative context for the achievements. For example, describe how the achievements compare with what was planned and with what was achieved last year and the reasons why.*

**Objective 1:**

**Objective 2:**

**Objective 3:**

**Beneficiaries** (*who the organisation serves and supports*)

### Key Achievements for the Reporting Period

1.

2.

3.

4.

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<sup>3</sup> Jargon buster

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

**Beneficiaries;** A person or group of persons who benefit from the work of the organisation. Beneficiaries may sometimes be called clients or service users. For charities, the beneficiary group will be defined in the charity's governing document.

**Outcomes;** The changes, benefits, learning or other effects that result from what the organisation makes, offers or provides. They may be intended or unintended.

**Outputs;** Products, services or facilities that result from the organisation's activities.

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### Outcomes for the Beneficiaries (and the Community)

- 1.
- 2.
- 3.
- 4.

### Overview of Main Activities/Services to advance the purpose of the organisation and the Outputs delivered from these activities for Reporting Period

#### Main Categories of Activities/Services

#### Outputs delivered from activities tasks

### Future plans

Provide details of the organisation's plans for the coming year and future years to meet its objectives and support its beneficiaries.

### Volunteers and employees

Provide details of the number of individuals who volunteer with the organisation during the reporting period

If the organisations has any paid employees, provide details of the average number of paid staff during the reporting period and the names and job titles of any senior/management staff.

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Summary of financial position	
<b>Current Financial Period (€)</b>	<b>Previous Financial Period (€)</b>
Gross (total) Income	Gross (total) Income
Gross (total) Expenditure	Gross (total) Expenditure
<b>Sources of Income for Current Period</b> €	<b>Main Expenditure Items for Current Period</b> €
For example;	For example;
<ul style="list-style-type: none"><li>• Grants (list each of the granting organisation and amount of each grant received)</li><li>• Donations &amp; Sponsorship (public, corporate, philanthropic)</li><li>• Fundraising</li><li>• Trading or Commercial Activities (if applicable)</li><li>• Other income sources</li></ul>	<ul style="list-style-type: none"><li>• Salary and Wages (including taxes and pension payments)</li><li>• Office &amp; premises rent</li><li>• Insurance</li><li>• Lighting &amp; heating costs</li><li>• Professional fees</li><li>• Board/committee expenses</li><li>• Costs related to trading or commercial Activities (if applicable)</li><li>• Administration</li><li>• Other Activity costs</li></ul>

### Capital Items Purchased Current Period:

*List items and cost including equipment, land, buildings, fixtures and fittings, etc.*

### Value of Net Assets at end of Current Financial Period:

*Give the total monetary value*

**Accounts prepared by:** *(name the person or accounting firm)*

Dated signatures of two members of the board/management committee *(usually the chairperson and the treasurer)*