

<b>Document 810</b>	<b>Annual Report (including Directors' Report)</b>
<b>What is this?</b>	<p>This is:</p> <ol style="list-style-type: none"> <li>1. An extract from the Solid Foundations good practice guide explaining the purpose of the Annual Report, and typical section headings</li> <li>2. Notes on Accessibility of the Annual Report</li> <li>3. Notes on Presentation of the Annual Report</li> <li>4. Note on Charities Regulation</li> <li>5. Sample section headings/layouts from a selection of Annual Reports available online</li> </ol>
<b>Governance Code Section:</b>	3.1 (c)

## Purpose of the Annual Report & Sample Section Headings

*The implementation of the Charities' SORP will bring changes and a structure to the annual report where the accounts (must disclose items) can also disclose the "may" and "should" items to give further clarity on our activities.*

The annual report is an underused publicity vehicle. Frequently the report is dull, providing only the minimum reporting and financial information required by the Companies Registration Office.

The annual report can have multiple other purposes, however:

- Informing members, service users and funders about what you have done
- Acknowledging contributions of money, time, skills and in-kind resources
- Impressing current funders so that they will continue to fund you
- Impressing potential funders in the hope that they will begin to fund you
- As a promotional document to attract more members, service users, volunteers, staff and supporters
- Informing other organisations and agencies about your work
- Informing the general public about your work.

There is no standard format for an annual report, but disclosure of the following information is recommended, possibly in combination with photographs, drawings, case studies, graphs, charts, scaled down images of publicity materials, and so on:

- **Introduction** by the chairperson
- **Background** on what the organisation is set up to do and how it does this
- **Annual review:** a clear overview of the work of the organisation over the past year (what was planned, what was achieved and what is next?)
- **Organisational structure:** if relevant, include information about branches and the number of members
- **Governance:** committee and subcommittee structure and individuals' names and acknowledgement by the governing body of its responsibilities for establishing, implementing and reviewing internal control systems
- **Staff:** individuals' names, job titles and whether they work full-time or part-time
- **Volunteers:** individuals' names and roles and/or total volunteer input
- **Remuneration** of directors (if any), the CEO and other senior staff \*\*

- **Acknowledgements** to funders, including donations in kind
- **Contact details and other official details**, for example CHY and company numbers
- **Financial report and annual accounts** to include:
  - Major support cost items
  - Expense categories
  - Unusual movements/transfers
  - Nature and purpose of fund
  - Assets and liabilities of fund
  - Investment powers.

*\*\* There is a difficult balance to be struck between the rights of funders and the public to know how money is spent within organisations and the rights of individuals on privacy about income.*

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## Notes on Accessibility of the Annual Report

As a publicly-funded organisation (and in the interest of good practice and accountability regardless of funding concerns), Carriglea Cáirde Services believes that transparency in every aspect of our work is vital and publishes its annual report, accounts, and Directors' Report on its website to ensure they are publicly accessible. To view these please click: <http://www.carrigleaservices.com>.

## Notes on Presentation of the Annual Report

- Use a Table of Contents, page numbers etc. This document is like any other report – the more clearly it is laid out, and simply it is worded, the better. Remember *why* you are producing this report in the first place. You are not trying to bamboozle your readers. You are trying to explain to them, in language *they* (possibly with no prior knowledge of your organisation or how charities work etc.) will understand.

- Include contact details (including social media information and links, if applicable), Directors' names, key calendar events, etc.
- Make it visual. Photographs of service users (with permission!), where you work, where funding has gone (e.g.: photos of new equipment in a healthcare setting; books in schools etc.) Important: use photos and graphics to *enhance* the way information is presented, not to confuse or overshadow it. If using infographics/graphs/statistics etc., ensure the information is accurate. Don't use too many either – the idea with using visuals is to draw the attention. But if the entire report is visual, nothing stands out.
- In general, do whatever you can to maximize the impact of your Annual Reports. They are a really great way for people to get to know your organisation, and perhaps, become new donors/funders.