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| Annual Rep0rt Planning Tools |
| Organisation’s Name |

The following tools can be used to plan the organisation’s annual report. The answers to the questions below will guide the content and structure of the annual report:

1. Who is the information designed for (stakeholders)?
2. What information do the stakeholders need?
3. How is that information going to be gathered?
4. How is that information going to be distributed to various stakeholders?

The table on the following page is designed to aid organisations in determining what information is necessary to be included in their annual report.

The main purpose of an annual report is to demonstrate the organisational successes or challenges over the previous year, with particular attention to goals achieved and any outcome measures that evidence the service meeting its objectives. It is also an opportunity to communicate changes and future plans to stakeholders.

Note that the annual report is different from the annual return necessary for accounting procedures, which the organisation is legally obliged to return to the Registrar of Companies (see Management Committee Handbook).

**Worksheet one –Annual Reporting Tool**

The following steps will assist in the writing of the annual report:

1. Input your stakeholders / target audience for the annual report in Worksheet one (i.e. funders, general community, service users, local forums etc).
2. At an early stage it is useful to plan how the report will be produced and distributed to the various target groups and costs associated with this. More and more frequently organisations are doing this through web based formats rather than more expensive and environmentally taxing paper versions.
3. To assist in planning the contents of your report, go through each section of the table section a) to g), marking whether the information in each section is relevant to the needs of the various stakeholders.
4. Next, use column 3 and 4 to review the information you have and what information will need to be sourced. In some cases a system will need to be established over the course of the year and the information recorded in the next year’s annual report. Worksheet two contains a table and example to assist in clarifying what data should be collected for the annual report.
5. Once the report is drafted the directors/ management committee will need to approve it.

Remember annual reports do not have to be lengthy to be effective; many organisations will keep their reports to 4 or 5 pages. It may assist to review the annual reports of other organisations prior to drafting your own.

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| **Worksheet one – Annual report planning tool**  **1. List of possible contents for annual report** | **Stakeholder**  **1** | **Stakeholder 2** | **Stakeholder 3** | **3. Do we have this information?** | **4. What further information do we need?** |
| 1. Chairperson’s or directors introduction / letter   Brief summary details of changing developments, goals achieved (or missed), actions taken and industry conditions: one or two pages maximum. |  |  |  |  |  |
| b) List of board, sub-committees and staff. |  |  |  |  |  |
| c) Organisation mission statement and objectives. |  |  |  |  |  |
| d) Key accomplishments from the last year  A useful annual report has two elements that should communicate this information:   1. Statistics that clearly demonstrate how the organisation has meet its objectives and targets; 2. A narrative account which may include: examples of success stories; activities undertaken during the year etc.   At all times, key accomplishments should be aligned to key objectives. Ideally these will address both process and outcome. See the worksheet 2 below which will assist in establishing what information will be most relevant for inclusion in the report. |  |  |  |  |  |
| e) Auditor’s reports / financial statements  - Overview / treasurers report  - Income and expenditure report (from audited accounts)  - Balance sheet (from audited accounts) |  |  |  |  |  |
| f) Information on future initiatives / new initiatives |  |  |  |  |  |
| g) Other (service user feedback, photos, etc). |  |  |  |  |  |

**Worksheet two – Evidence of Objectives being Met**

The following table can be used to align strategic organisational goals with evidence and data. Note that there is a difference between information which states how a process happened and what the outcome was or how effective it was. Example A) below, has an objective of ensuring service users have adequate supports for independent living. It should be noted that this objective can not be evidenced as being met by simply providing numbers on people attending the course, as this does not indicate whether the course was useful or not. Additional information on the successful outcomes of the project would also need to be provided, see below for examples.

Note that it can often be more challenging to obtain good evidence of outcomes than process. Collecting useful outcome data generally requires careful planning, staff training and reflection. Constructing an annual report can provide a useful opportunity to reflect on the projects information collection system.

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| **Strategic objective** | **Data on process** | **Data on outcomes / outputs / impacts** |
| **Example A)**  To ensure service users have adequate supports for independent living. | * No. of independent living skills programmes run / sessions attended * Attendance * Overview of content * Case studies | * Results of pre and post client assessment / surveys * Results of service user review of the course * Data on number of tenancies supported and sustained * Data on number of follow up supports post course. |
| Strategic objective 1 |  |  |
| Strategic objective 2 |  |  |
| Strategic objective 3 |  |  |
| Strategic objective 4 |  |  |
| Strategic objective 5 |  |  |