

User Guide – Annual Report

All registered charitable organisations are legally required to submit an annual report. The deadline for submission of annual reports is 10 months after the financial year-end date (e.g. if a charity's financial year end date is 31 December, the annual report is due by 31 October of the following year).

This form (image below) must be used when you are submitting your annual report and there are four tabs to be completed: Activities, Financial, Documents and Declaration.

The screenshot shows the 'Annual Report - Activities' form. On the left, there are four tabs: 'Activites' (selected), 'Financial', 'Documents', and 'Declaration'. The main content area shows the charity name 'My Large Test Charity', the reporting period '01/06/2016 to 31/05/2017', and the due date '31/03/2018'. There are three main input fields, each with an information icon (i) and an eye icon. The first field asks 'What activities were carried out by your charity during the reporting period in furtherance of your charitable objectives?*' and has a dropdown menu. The second field asks 'Give a short description of your charity's activities during the reporting period in furtherance of your charitable objectives.*'. The third field asks 'Who were the direct beneficiary groups of your charity during the reporting period?*' and has a dropdown menu. A 'Save Draft' button is located at the bottom left. Callout boxes provide the following information:

- Fields marked with a red asterisk are mandatory and must be completed.** (Points to the asterisks in the first and second input fields.)
- The 'eye' symbol indicates that the information entered in a particular field will appear on the public Register.** (Points to the eye icons in the first and second input fields.)
- This symbol indicates that there is further information available if you hold your mouse over it.** (Points to the information icons in the first, second, and third input fields.)
- The save draft option appears on each tab of the form and allows you to save your progress. (Note: there is no automatic save so we recommend that you save draft regularly as you work through the form).** (Points to the 'Save Draft' button.)

1. Activities

In this tab you are required to provide information about the activities of your charity during the relevant reporting period.

The name of your charity, and the reporting period dates, will appear at the top of the screen. Please ensure that the information you enter in the annual report is for the relevant financial year as per the reporting period dates.

When completing this section of your annual report you must show how your activities during the reporting period directly supported your charity's objectives and how you provided a public benefit.

What activities were carried out by your charity during the reporting period?

Please select the wording from the list provided which best describes the activities carried out during the reporting period. You can select more than one activity from the list.

Description of your charity's activities during the reporting period

Please describe the activities carried out in furtherance of the charitable objectives of your organisation (max. 500 characters).

Who were the direct beneficiary groups during the reporting period?

Please select one or more beneficiary groups from the list provided.

When selecting beneficiary groups you should be able to demonstrate, if requested, how your activities directly benefited each group selected.

Does your charity provide a direct service to individuals?

If you answer 'yes' to this question you will then be asked if you charge a fee for this service. If yes you will be asked to provide details of your fee structure and beneficiary selection process and whether you have any concessions for people who cannot afford the fee.

If you provide a direct service but do not charge a fee, you will be asked for details of your selection process in deciding who will benefit.

Indicate the average number of employees and paid office holders & indicate the number of individuals who volunteered (excluding Northern Ireland).

Please select one band to indicate the average number of employees and paid office holders in your organisation and how many individuals have volunteered (unpaid) for your organisation during the reporting period in Ireland (excluding Northern Ireland). This includes full and part-time individuals.

Indicate if your organisation has signed up to any of these codes or principles

Please indicate if your organisation has signed up to any code, principle, or programmes in the list provided.

2. Financial

In this tab you are required to provide details about your charity's income and expenditure in the relevant reporting period. Please enter all values in EURO rounded to the nearest EURO.

Gross Income

This is the total gross amount of all income your charity received from all sources during the reporting period.

Sources of your Income

Please break down your total income to specify how much has come from the listed sources. If you have income from any sources not included in the list you can enter this under "from other sources" and then specify the source(s).

If you have donation income please specify types

Please select all options from the list which apply to your charity.

Gross Expenditure

This is the total gross expenditure of all types by your organisation during the reporting period.

What was your organisation's expenditure on salaries in that year?

Please enter the amount of money your organisation spent on salaries and wages including PRSI, pension payments, etc. in the specified period.

3. Documents

Documents for upload must be in PDF format and less than 5mbs in size. Please note that annual reports will be made available to the public on the Register of Charities (with the exception of annual reports submitted by private charitable trusts). If your charity is incorporated (a company registered with the CRO) the annual accounts submitted to the CRO will also be published on the Register of Charities.

4. Declaration

This section allows you to review and certify the information you have provided. If you are satisfied that it is correct, and it has been approved by the trustees for submission, you should submit your changes. The privacy terms and Statement of Information Practices should be read and accepted. Once you are satisfied with this you can click on



Preview

to download a PDF of your information.



Submit

Then click on to submit the report to the Charities Regulator.