

The upside of great reporting..


What's in it for me?



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Whangarei
December 2016

Have you heard about the Performance Report?

- The way organisations do their financial reporting has changed
- Applies to registered charities
- New not-for-profit standards

Parent Network Aotearoa Inc. (EXAMPLE)	
Entity Information	
"Who are we?", "Why do we exist?"	
For the year ended:	
31 March 2016	
Legal Name of Entity:*	Parent Network Aotearoa Inc.
Other Name of Entity (if any):	Parent Network
Type of Entity and Legal Basis (if any):*	Incorporated Society and Registered Charity
Registration Number:	CC12345
Entity's Purpose or Mission: *	Parent Network empowers parents to make informed choices throughout pregnancy and birth and to parent with confidence.
Entity Structure: *	Members of Parent Network elect a management committee which includes Chair, Treasurer, Secretary, Health Practitioner Liaison, Newsletter Editor, Fundraising Co-ordinator and up to four other members. Parent Network management committee employs one part-time co-ordinator for 10 hours per week.
Main Sources of the Entity's Cash and Resources:*	Parent Network relies on grants from government and philanthropic trusts to cover the co-ordinator role and other incidental costs. Course fees and membership fees help cover other operating costs. The proceeds of fundraising are used to purchase new assets.
Main Methods Used by the Entity to Raise Funds:*	The main fundraising activity is the annual fair. Money raised from the event is used to purchase assets, such as office equipment and new books for the library. Funds are also raised at two quiz nights each year and through selling wheat bags.
Entity's Reliance on Volunteers and Donated Goods or Services: *	Parent Network relies to a great extent on volunteers for their activities. The committee members volunteer their time to set strategy, attend meetings, produce a newsletter, and find guest speakers. Guest speakers are volunteers and members volunteer to run the annual fair. Members make and donate wheat bags which are sold to raise money.
Contact details	
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Website:	www.pna.org.nz
	 www.facebook.com/parentnetworkaotearoa

Which tier will your charity report in?

In order to complete your Performance Report you need to know which “**tier**” you fit into. You need to think about **how much money you spend to operate your organisation** and **what method of accounting you use**.

There are four tiers but most charities fit into tier 4 or tier 3.

- **Tier 4** – operating expenses below **\$125,000** and uses **cash accounting**
- **Tier 3** – operating payments below **\$2 million** and uses **accrual accounting**



Why have things changed?

- To have better understanding of a diverse sector
- To increase financial capability in the sector
- To provide clear concise information

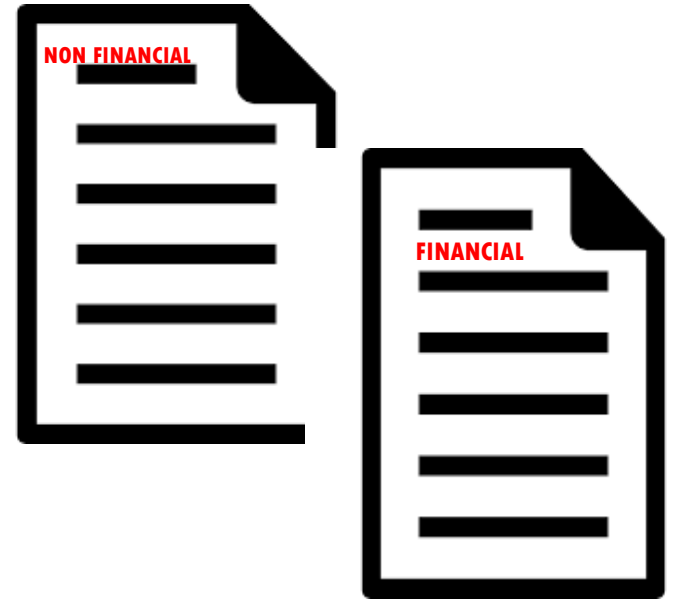


What needs to be included?

- **Non-financial information**

 - Entity Information

 - Statement of Service Performance



- **Financial information**

 - 2 or 3 statements

 - depending on your level of operating expenses

What is it? A fantastic opportunity!

- You tell your story
- Provides context
- Connects the dots
- Increases understanding

Without context, a piece of information is just a dot. It floats in your brain with a lot of other dots and doesn't mean a damn thing. Knowledge is information-in-context ... connecting the dots.

- Michael Ventura

Begin at the beginning...

Introductions

- **Entity Information**

Who are we? Why do we exist?

Answers questions about your charity such as...



- What are you set up to do?
- How are you structured?
- Where does your money come from?

Set the scene – show your stuff!

Statement of Service Performance

What did we do? When did we do it?



- **Outputs** = activities undertaken
- **Outcomes** = the change you want to influence



How can this report help you?

- Strategic planning
- Governance
- Marketing



Think about your target audience

Who will read your report?

- Your members
- Funders, sponsors and donors
- People you provide services to
- Members of the public
- Prospective volunteers



Make it easy - write it really well once and use it many times

Sensibilities and Accountabilities

- Mandatory requirements vs Accountability requirements
- Funders will start to review their processes
- Alignment across the sector
- More time to focus on your mission



Stand out from the crowd

27,927 charities currently on the register

- Make it interesting
- Market yourself
- Personalise your report
- Highlight your difference
- Collaborate with others



Need a hand?

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People

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- DIA Community Operations
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Thank you

