

Annual reports

Each year every project has to provide an annual account of its activities for the Rank Charities - along with a financial statement. It is the worker/trainee who writes the main bulk of the report; the manager should provide an afterword (see below).

In the first year of *Youth or Adult?* the report is edited and produced in a collection alongside those from other new projects. The College provides editorial assistance - and prepares and prints the reports. Mark K. Smith, the Rank Research Fellow and Tutor will assist projects with the preparation of their reports.

Particular arrangements apply to the Gap scheme full details of which are given in *the Volunteers Handbook*.

Contents

Reports should include the following elements:

A summary of the main highlights/achievements – this is really just a short series of bullet points.

A brief description of the project - what it aims to do; where it is located etc. You should also include something concerning the original (or later amended) objectives of the project that your agency submitted to the Foundation.

A brief summary of the activities of the project over the previous year highlighting specific areas of work. Remember that the various Initiatives are concerned with work with young people - and with the development of the project workers/trainees so include material about both. Remember to provide information on the numbers of young people you are in contact with etc. (see the section on recording, monitoring and evaluation).

A review of the worker's development. How have you, the worker, developed? What have been your main areas of learning and change? What have been your main sources of support?

An evaluation of these achievements - how do they compare with the original objectives; what has been achieved in addition to these? How has the project evolved/developed? What problems have been encountered? In addition projects should highlight whether they have been able to gain matched or additional monies as a result of the Rank funding.

A conclusion and discussion of your future work programme. The conclusion should include any particular objectives or targets the agency has with regard to the

project and any changes (link this back to the evaluation etc.). The conclusion should also highlight any points of learning relevant to other agencies.

A brief commentary by the line manager. This should focus on the development of the project and the worker.

It should be remembered that the worker writes this report on behalf of the agency. It is not a personal report - but it may include some personal reflections on behalf and the worker and manager.

With regard to content, think carefully about how particular incidents and personalities who may be identifiable are discussed. This is a public document and may be read by some of those involved in the project.

Presentation and editing

Agencies are recommended to look at how they might use their annual report for purposes other than simply reporting to the Rank Charities. Many agencies have used the report both for informing other interested parties and as part of their making application to grant-making trusts etc. As a result they have chosen to report in a variety of formats, often using photographs and illustrations.

For *Youth or Adult?* Projects in their first year, thinking about presentation is not important as all the reports are formatted to a standard design by the College. The reports will, in the main, only be subjected to a light edit (for such things as grammar, spelling, and sense).

NB: The wisest projects combine both the financial statement and the annual report, once again using it as an extremely saleable item.

The audience and level

The reports are initially for the Directors of the Rank Charities. A good working rule here might be to imagine readers as interested colleagues, who perhaps don't have access to the same specialist language as yourselves.

In producing the report it is important that it is written so it can be read by others in the Rank network. Annual reports can be seen by a wide selection of people including managers, sponsors, young people and the other workers. They are public documents – and the Charities actively encourage agencies to share their reports with others.

The initial target may be Trustees but with a group of ten Trustees they may have ten other people they can pass it on to. The report itself should be transferable to others, not just for the use of the Rank Charities. Use the report to communicate the work and develop it for the future to attract other funders and sponsors. It should be something that can be handed out on many other occasions over the following year.

Length and deadline

The report should not exceed 1000 words. Aim for about 800 words.

The reports must be with the Charities by August 31st each year.

Should an annual report and financial summary not be received by the end of September it will be assumed that the agency no longer want funding and our investment will cease. No reminders will be sent.

Quantity

For *Youth or Adult?* (although not for the first year), *Investing in Success*, and *Key worker* programmes it is useful for the Charities to receive about 30 copies of the annual report. They can then circulate it automatically to their Trustees and use it on occasions with other projects, new projects, Gappers, etc.

A note for first year *Youth or Adult?* Projects

First year *Youth or Adult?* Projects must adhere to the following timetable in order that all the reports can be compiled and printed:

1st July Submission of the first draft of the report.

1st August Submission of the final version of the report.

First year reports should be sent directly to Mark Smith. A copy of the second draft should be sent to the relevant Youth Director (Charlie Harris or Chris Dunning), along with a financial statement.

Financial statements should go direct to the Rank Foundation –not to the College.

If you use a word-processor it would be a great help to us if you could send your piece on disk along with a hard copy. Please use Word, RTF or text format to save your report. Remember to send us a copy and not the original and to tell us what programme you have used.

Some may find it easier to simply dump their piece into an e-mail box. Use smith@infed.org

Visit the Rank web pages (www.ymca.ac.uk/rank) for further ideas.