

CSO Partners

Building a Vibrant Society

GUIDE TO ANNUAL REPORTING

Emphasising achievements

Proving credibility

Increasing accountability

GUIDELINES TO HELP YOU PREPARE OUTSTANDING ANNUAL REPORTS

This document serves as a guideline to NGOs to write simple, high impact Annual Reports that would hold up to high standards of scrutiny while sustaining the readers' interest.





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LAYING THE FOUNDATION FOR A GOOD ANNUAL REPORT

WHO IS AN ANNUAL REPORT FOR?

- Society at large
- Primary stakeholders and community members
- Internal stakeholders like Governing Body / Board and employees
- Existing and potential donors and supporters
- Peer organizations
- Networks of organisations working on similar issues
- Government

THE CHALLENGE OF WRITING GOOD ANNUAL REPORTS

NGOs often feel that communication needs to be shared only within the communities they work in. There is also a belief that due to regular interaction with community members and stakeholders their activities are already well-known. Further, NGOs feel that preparing Annual Reports costs time and money. Consequently they bring out reports which are not effective in terms of their content and presentation.

On the contrary, the Annual Report of an NGO plays a crucial role in that it communicates its progress and status to stakeholders, community members, donors and well-wishers.

For many readers the "Annual Report" is "the NGO". It is all that they see about the organisation. If there are errors or omissions in the report they will naturally assume that this is reflective of the organisation.



THE IMPORTANCE OF TRANSPARENCY & ACCOUNTABILITY

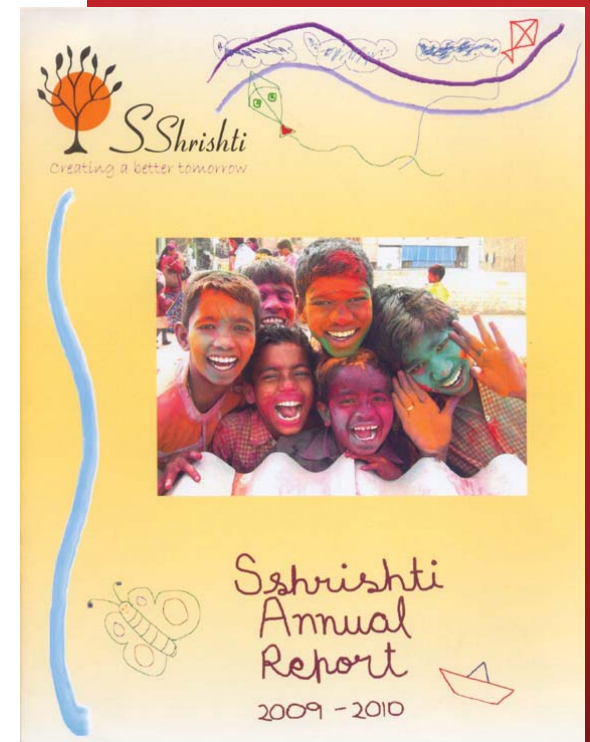
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With increased attention and investment of different stakeholders towards NGOs, the latter are expected to demonstrate a high degree of accountability to their communities and constituencies. Besides if NGOs demand accountability from other stakeholders, they must demonstrate similar transparency and accountability themselves. The Annual Report of an NGO is the ideal tool to demonstrate its transparency and readiness to keep its accounts and records open for public scrutiny while also reaching out to a wider constituency.

WRITING YOUR ANNUAL REPORT

The key elements of a good Annual Report from an NGO involve the following:

- Public disclosure of the purpose, systems, capacities and programme performance.
- Disclosure of financial status and performance.
The 'why' or content along with the 'how' or the quality of information presented work together to make an Annual Report effective and realize its purpose.
- Communication and presentation of your work in a reader friendly and attractive package is also an essential component of a good Annual Report.



Nominee, 3rd CSO Partners Outstanding Annual Report Awards, has an attractive cover page to begin its story.



CONTENT GUIDELINES

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INTRODUCING YOURSELF

Essential information about your organisation should be included in the Annual Report. The information provided must enable a reader to understand your organisation and contact you if required.

INFORMATION CAN BE INCLUDED ON

CONTACT DETAILS

- Full name of the organisation. Also include acronyms if your organisation is better known in such a way. For example the organisation, 'Child Rights and You' is well known as CRY.
- Contact information - address, telephone numbers, e-mail addresses, names of key contact persons with designation and website details.

If there is more than one Office, provide contact information about all the offices classifying it under Head Office, Registered Office, Field Office, etc. If you do not have a website, please consider setting one up as it is imperative that NGOs be digitally connected. The NGO Marketplace initiative of CSO Partners (www.ngomarketplace.com) can help set up a micro site at a nominal cost. Also provide information about other public profiles of your organisation – eg. Facebook, Twitter, LinkedIn etc.



CONTENT GUIDELINES

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INCLUDE REGISTRATION AND BANKING INFORMATION

- Registration information – whether registered as Society / Trust / Section 25 Company, FCRA registration status.
- Income Tax exemption details pertaining to 12A/10(23C), 80G exemption details.
- Name/s of Banker/s.
- This information needs to be in an easy to spot location in your Annual Report so that a reader can easily get in touch. The inner front or back cover is a good place for these details.

Administrative Head Quarters

SVYM, Saragur

Hanchipura Road, Saragur
H.D. Kote Taluk, Mysore District - 571121
Karnataka State, INDIA
Tel/Fax: 08228 - 265877, 265412

SVYM, Right to Information – Project Office

1st Main, Opp. Jain Bhavan
Near BSNL Office
H.D. Kote - 571124
Tel: (08228) 255755

SVYM, Dharwad

#165, Parvati Sadan,
Opposite Balaji Traders,
Channabasaveshwar Nagar,
Dharwad - 580007
Tel: 0836 - 2771723.

SVYM, Bijapur

Ganga Nivas, Opp. Sanik School, 1st Gate,
Toravi Road, Bijapur - 586 101
Tel: 08352 - 272032
Mobile: 9686666327

SVYM, Hassan

No 976, 4th Cross, Ward 2
K.R. Puram, Sampige Road
Hassan - 573 201
Tel: 08172 - 265132

SVYM Kodagu

Vivekananda Arogya Kendra
Ayyappa Complex, Near Vijaya Bank
Gonkoppal - 571 213
Ph: 08274 - 247859

SVYM, Bangalore

No.321, 4th Cross, 8th Main
Dollars Colony, JP Nagar 4th phase
Bangalore - 560078
Tel/Fax: (080)26586934, 26586933

SVYM of North America

2832, Alderberry Court
Fullerton, CA 92835, USA
Tel: (714)674-0105

SVYM of United Kingdom

38, Monmano Drive
Didsbury Point
Manchester M20 2EB



SVYM Registered Office

Swami Vivekananda Youth Movement

CA-2, KIADB Industrial Housing Area, Ring Road, Hebbal, Mysore,
Mysore District, Karnataka, India, Pin - 570 016
Phone No: 0821 - 2415412, Tele Fax No: 0821 - 2304986
Email: svym@svym.org.in
Website: www.svym.org.in, www.vild.edu.in, www.vis.in
Blog: http://blog.svym.net

Swami Vivekananda Youth Movement, Winner, 3rd CSO Partners Outstanding Annual Report Awards (Large category), provides relevant information.

WHO YOU ARE AND WHAT YOU STAND FOR

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VISION AND MISSION

Vision and Mission statements are the guiding force and the key elements of an organisation's strategic planning. An organisation's vision defines its purpose and serves as a source of inspiration to personnel. The mission outlines how the organisation will accomplish its vision in realistic terms. The mission must be compatible with its legal purposes and must meet the requirements for not-for-profit or charitable status.

VALUES

Values influence an organisation's activities, its relationships with stakeholders and its reputation. Values may be expressed as beliefs, guidelines or rules, and may be set out in a code of conduct.

Vision

To Regenerate the Rhythm of Life of the Disadvantaged

Mission

A nurturing home for every orphaned child, an opportunity for higher education for every girl and for every adult the dignity of self reliance and the desire to give back to society

Theory of Change

There are millions of orphaned and abandoned children in India; in addition, girls from weaker sections of society do not get an equal opportunity to continue their education; professional skills and attitude are lacking among disadvantaged communities to become economically self reliant.

Udayan Care ensures orphaned children the right to a family and home, while also fostering equity in education for girls by assisting them to continue higher education, and communities to train themselves in vocations, by engaging socially committed individuals, who provide a transformative, nurturing and mentoring environment, to help them realize their full potential.

Udayan Care, Nominee 3rd CSO Partners Outstanding Annual Report Awards, displays the Vision, Mission and Values adhered to by the organisation.



WHO YOU ARE AND WHAT YOU STAND FOR



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WHAT THIS SECTION SHOULD COVER

- Information on the origin of the organisation, its Mission and Vision alongside the message from the Chief Functionary.
- Core values can include integrity, accountability, ethical practices, being client-focused and responsive.
- Objectives for the reporting year and their implementation strategies can be included. These provide a concrete base to understand your programme.
- A clear connection between organisational objectives and Mission/Vision.

Revisit the Vision and Mission statements and check if it is of relevance to the organisation in its future journey. If not, it could be a good time to rethink and reset the statements.



ORGANISATIONAL GOVERNANCE

Good governance is the key to the sustainability, legitimacy and impact of NGOs.

Good governance is defined as a transparent decision-making process in which the leadership of a non-profit organisation, in an effective and accountable manner, directs resources and exercises power on the basis of shared values. This function is usually vested in the governing body of the organisation. This body provides leadership to the organisation, guides its mission and helps set its strategic direction. It also ensures that the organisation lives up to its values and objectives. It establishes internal systems of checks and balances that ensure that public interest is served.

The presence of a strong and well functioning governing body helps make the organisation democratic and inclusive, ensures that resources are well managed, and safeguards the organisation's public-service orientation.

WHAT THIS SECTION SHOULD COVER

Details pertaining to the governance provided in a reader-friendly tabular format as given alongside.

DETAILS OF GENERAL BODY	
Name & gender	
Position on the governing body	
Occupation / Designation	
No. of meetings attended	

ORGANISATIONAL GOVERNANCE

Along with this information, you can also provide some of the key resolutions that have been taken during the reporting year.

DETAILS OF SPECIAL GOVERNANCE SYSTEMS, IF ANY.

These could range from:

- Primary stakeholders being required to have a say in organisational decision making.
- Constituting an Advisory Committee as part of governance.
- Having separate governances for different states in the case of a pan-India organization.
- Having local representation on your Board for an international organisation not registered in India.
- Mention of these will add value as it establishes a link between the organisation's mission and its governance.
- All information pertaining to the organisational governance must be provided in a manner consistent with the type of organisation

Type of Organisation	Governance Structure
Society	Governing Body
Trust	Board of Trustees / Managing Committee
Section 25 company	Board of Directors and Managing Committee

These details demonstrate the transparency of your organisation and also boost its credibility.

board and management

Jurisdiction and tasks of board and management during 2009-10

The Board

- is ultimately responsible for strategy, policy, budget and results.
- approves audited financial statements and ensures the organization's compliance with laws and regulations
- sees to it that the activities of the organization are aimed at realizing the target and contribute to its mission
- examines the strategic long term plan and the individual annual plans and budgets and reviews the progress of the plan throughout the year
- decides adjustments of plans, budgets and investments

In 2009-10, the Board met 3 times:
August 4, 2009, October 23, 2009, February 26, 2010.

Composition of the board as on March 31, 2010

Name	Position on Board	Meetings attended	Years on the Board	Age	Gender	Occupation
Srikrishna S	Chairperson	3	5	29	Male	Chairman & Director Consulting of Sattva
Nandita Lakshmanan	Board member	1	5	41	Female	Founder & CEO of The Practice
Hema Hattangady	Board member	3	1	47	Female	Vice-Chairman & CEO of Schneider Electric Conzerv.
Bhasker Sharma	Board member	3	1	51	Male	General Manager and Director of Operations, mFormation Technologies.

Notes on Board of Trustees

- None of the board members are related to each other
- A Board rotation policy exist and is practiced
- 2 board members retired this year - Mr Umesh Malhotra and Mr Nagesh Karuturi
- 2 new board members were added this year - Mr Bhasker Sharma and Ms Hema Hattangady
- Non of the board members have received a remuneration from the organization

Dream a Dream Foundation, Winner, 3rd CSO Partners Outstanding Annual Report Awards (Medium category), throws light on Board related matters.

HUMAN RESOURCES – BUILDING BLOCKS OF AN ORGANISATION

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The vision of an organisation is shaped by its employees. 'People power' is of particular significance to NGOs, most of whom are understaffed. According to studies, nearly 73.4% NGOs have one or less paid staff. With recruiting and retaining staff emerging as a challenge, including them in the Annual Report is a good way to motivate them.

WHAT THIS SECTION SHOULD COVER

- Information about the organisational structure preferably supported by an organogram to depict the hierarchy.
- Gender composition and staff strength in different departments - eg. in administration, finance, programme, fund raising, etc. Gender composition will portray you as an equal opportunity employer. If you employ people with disabilities, those living with HIV and AIDS or from minority communities this could be highlighted too.
- Information on volunteers who are not on the payrolls that will demonstrate the support enjoyed by your organisation.
- Special mention of staff contributions and achievements along with awards won.
- Information on salary scales in your organisation to indicate your paying capacity and help attract fresh talent. It will also demonstrate the working of 'equal opportunity'.
- Details of social security measures offered to employees. Special policies such as child protection or employment to special groups of people can be mentioned.

Atma Volunteers

In 2009-2010 Atma had 17 amazing volunteers from 10 different countries. Their incredible professional skills, diversity of outlook, and experience were responsible for executing many of the 49 outcomes Atma facilitated for partners.

Name	Country	Partner	Months	Activities Carried Out
Eva Anttila	Finland	Reality Gives	3	Marketing plan and materials
Alessia Trachese	Italy	CHLDReach	3	Research program
Carlene Joosten	Netherlands	CHLDReach	4	Rebranding & PR materials
Karine Mijneer	Netherlands	CHLDReach	4	HR overview and development
Parveen Kaur	India	CHLDReach/ Reality Gives	2	Financial advisory
Scott Clark	United States	Atma	1	Photography
Mauria Waepel	Switzerland	Reality Gives	2	Kindergarten helper
Maria Springoltz	United States	CHIP	3	Organisational development
Dani Wathan	Malaysia	Narehwadi	1	Summer camp coordinator
Fredrick Dutilh	Netherlands	Atma	2	Marketing materials
Alex Jeffares	New Zealand	Reality Gives	5	Organisational development
Abigail Burns	United States	Narehwadi	2	Summer camp coordinator
Clover Wootton	United Kingdom	Atma	2	Administrative assistance
Anneke Hooiang	Netherlands	Aseema	3	Business plan development
Francesco Steliano	Italy	Atma	1	Photography
Wendy Dinning	Australia	Atma	3	Marketing strategy
Chris Giallongo	United States	Atma	part-time: 12	Organisational development

Volunteer support

Over the past year Atma provided 274 hours of support to our volunteers ensuring that they were able to provide the best possible outcomes to partners. Matching volunteer expectations and goals to the Atma Partner needs is of the utmost importance and allows us to use the skills and passions of the volunteer to drive the project forward.

Atma's Volunteer program has been perfected over the last year through the inputs and experiences of our Volunteer Alumni! Thanks guys!





Atma volunteers: 1. Carlene and Karine with CHLDReach Management. 2. Maria and the Reality Gives Kindergarten staff. 3. Wendy and Karine at school.

Atma, Nominee, 3rd CSO Partners Outstanding Annual Report Awards, takes pride in highlighting the support it enjoys.

PROGRAMME PERFORMANCE

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Programmes are the heart of an NGOs work. They outline the steps being taken by the organisation to bring positive change in the lives of the people it seeks to serve. The programmes help the reader to gain in depth understanding of the issues and communities they serve while establishing credibility with local communities, governments and donors alike.

WHAT THIS SECTION SHOULD COVER

- Details of main activities undertaken during the reporting year. You could also show this as a logical flow from your organisational objectives, programme approach, strategy etc.
- Details of your geographic coverage (States, districts, blocks, villages), population covered and issues touched. Target areas can be depicted on a simple map, for easier understanding.
- Target populations can be shown on a graph or chart.
- Information about other stakeholders covered in your programmes - eg. Government, Panchayats, etc.

Program Strategy

The Sava Bharti Schools aim to become temples of learning, radiating knowledge and excellence. The schools, through quality and holistic education, aim to develop the students into well rounded personalities empowered to step into the world as confident, responsible and contributing citizens.

The program focuses on three key pillars of intervention to deliver quality education, focus on age and class-appropriate learning levels and holistic development of the children, ensure teachers motivation and commitment towards children and engage children, parents and community with the school. Measures and processes have been instituted around each of the intervention areas to ensure smooth implementation, quality and sustainability of the initiative.

Age and Class Appropriate Learning Levels and Holistic Development of Children

Given the challenge of low learning levels among children across rural India, the teaching philosophy at the Sava Bharti Schools is centred around enhancing learning through conceptual clarity and application-based activities. The assessment tools are consciously designed to evaluate students according to the different levels of Bloom's Taxonomy. It is equally important that the students acquire life skills and values and emerge as employable and responsible citizens. The academic and non-academic school calendar is created to give such exposure and learning opportunities to children.



Bharti Foundation, Nominee 3rd CSO Partners Outstanding Annual Report Awards, talks of its Program Strategy in an eye-catching manner.



PROGRAMME PERFORMANCE

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- Response to various challenges and its impact on future plans of the organisation. This information could be provided in the form of graphs, pie or flow charts to make it reader friendly.
- Case studies that showcase the success and impact of the programmes undertaken.
- Details on monitoring the progress of programmes
- History and evolution of programmes and their adaptation to changing societal needs.
- Learnings to indicate the knowledge-driven culture of your organisation and the affinity to introspect on past actions, successes and failures.

While including case studies or photographs of individuals, please respect people's right to privacy and take their informed consent. Organisations working with HIV positive people or with survivors of human trafficking often use personal stories of individuals to highlight how their interventions offered them better lives. In such cases, names should either be changed or informed consent of the individual should be obtained. Showing sensitivity and concern improves the image of the organisation in the eyes of its stakeholders, supporters and the public.

FINANCIAL PERFORMANCE

Financial transparency is a key component to good governance. It is therefore imperative that NGOs become more transparent and accountable. Information provided has to be both reliable and timely for effective regulation and monitoring by beneficiaries, donors and governments.

WHAT THIS SECTION SHOULD COVER

- An abridged financial statement and an income and expenditure statement.
- Financial statement analysis and segregation of assets and grants.
- Internal audit with details including:
 - Type of internal audit system of the organisation
 - Frequency of audit system
 - Persons involved in the audit
- Provide disaggregated statements of your funds / grants
- Organisations that raise resources through sale of commodities like craft items made by their beneficiaries should consider disclosing information about it.
- Provide detailed financial statement as an annexure or provide a link / address from where any interested reader may access it. Also ensure that all statements are signed by office bearers to validate them.

INCOME & EXPENDITURE STATEMENT FOR THE YEAR ENDED 31ST MARCH, 2010

EXPENDITURE	AMOUNT		INCOME	AMOUNT	
	₹	₹		₹	₹
Direct Program Expenses		6,913,483.70	Income		13,152,871.64
Programs Delivery	4,167,376.00		Direct Donations	5,421,206.65	
Volunteer Management	72,952.00		International Funding	7,501,015.00	
Salaries and Operations	2,673,155.70		Miscellaneous Income	3,648.37	
			Interest Income	227,001.62	
Indirect Expenses		2,221,441.83			
Administration	992,617.20				
Fundraising & Communications	1,198,742.63				
Purchase of Merchandise	30,082.00				
Depreciation		118,723.00			
Excess of Income over Expenses		3,899,223.11			
Total		13,152,871.64	Total		13,152,871.64

BALANCE SHEET AS ON 31ST MARCH, 2010

LIABILITIES	AMOUNT		ASSETS	AMOUNT	
	₹	₹		₹	₹
Current Liabilities			Net Fixed Assets		519,043.00
Duties and Taxes	103,421.00	103,421.00	Furniture & Fixtures	95,476.00	
			Computer	25,947.00	
			Office Equipment	1,163.00	
			Vehicles	396,457.00	
Profit & Loss Account		9,000,605.44			
Opening Balance	5,085,598.33		Investments		6,784,600.00
Current Period	3,915,007.11		Fixed Deposits	6,784,600.00	
			Current Assets		1,800,383.44
			Cash in Hand	11,525.00	
			Bank Accounts	1,364,179.44	
			Staff Advances	87,704.00	
			Merchandise Inventory	10,938.00	
			Accrued Interest	113,410.00	
			Tax Deducted at Source	23,127.00	
			Office Rental Deposit	185,000.00	
			Telephone Deposit	4,500.00	
Total		9,104,026.44	Total		9,104,026.44

Dream & Dream 2009-10 25

Dream a Dream Foundation displays transparency in financial matters.

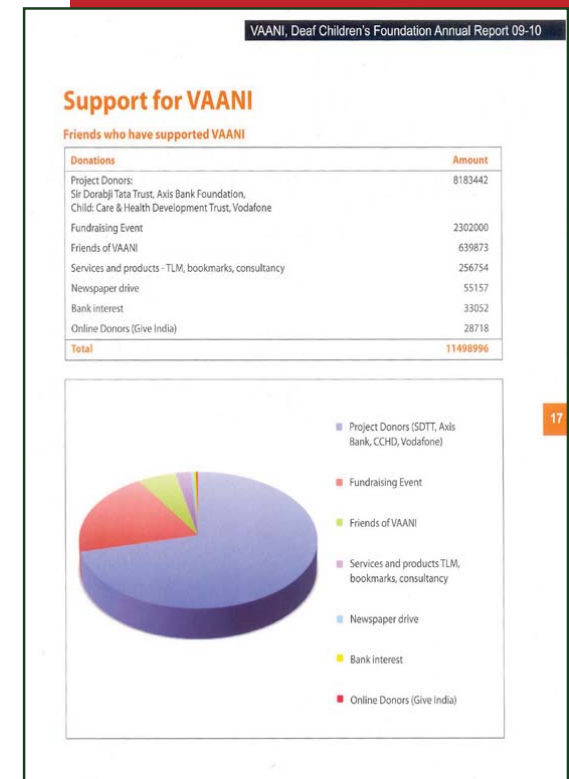
DONORS AND FUNDING

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Funding is a key concern area and NGOs are always looking at ways to increase or diversify their funding. NGOs receive funds from government, foreign sources, corporate or public donations and are therefore accountable to them. Additionally, the people whom the NGO serves have a right to know where the organisation derives its resources from.

WHAT THIS SECTION SHOULD COVER:

- Provide a list of major donors, preferably project-wise. Although this is not a statutory requirement, NGOs may consider it their moral obligation to disclose their sources of funding.
- If required, mention what proportion of your annual budget was provided by each donor. Providing absolute numbers in this section or in the abridged financial statement section is a good practice.
- If you have received non-monetary support – in the form of expertise or materials, list these details as well.
- Mention individuals or organisations who have provided strategic or technical support and provide relevant details.
- Also include community contributions or cost sharing by community if any – even if it is not included in your books of accounts.



VAANI, Nominee 3rd CSO Partners Outstanding Annual Report Awards, draws attention to the funding received.



NETWORKS & ALLIANCES

Today, networks play a crucial role in virtually every aspect of society across the globe. The utility of networks in social development is well acknowledged. Using their collective strength, networks can draw attention to critical issues and bring desired social or policy level changes through their bargaining power. Networks can also enable NGOs to access funding and other resources through pooled in competencies.

External supporters can disseminate awareness and information on key issues and thus strengthen the work of the NGO. Additionally, they can leverage their own networks to increase the NGOs' outreach through a multiplier effect. Supporters also bring their individual competencies and benefit the NGOs.

WHAT THIS SECTION SHOULD COVER

- Provide a list of the networks that your NGO is a part of. Provide a brief description of the network's mandate, how it fits with your organisation's philosophy and mandate, its activities and how your organisation's association with it in the reporting year.
- Provide a list of partnerships and a brief description on the type of association.
- Provide a list of your supporters with their due permission as some of them may wish to maintain their anonymity.

Initiatives that address key issues may be mentioned. For example: your organisations' mandate may be the education of girl children, but you may find that one of the main factors preventing this is early marriage. So you might also be partnering with another organisation that works towards conducting marriages after the legal age of 18.



ACKNOWLEDGEMENTS AND APPEALS

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NGOs always seek means to highlight their cause and needs. The Annual Report serves as a good means to further your cause as it is widely distributed. You could well highlight needs for financial sustenance, support on issues, and for volunteers or personnel, amongst other requirements.

WHAT THIS SECTION SHOULD COVER

- Include a message from your Chief Functionary to summarise the achievements of the year, highlight successes and briefly mention plans for the future.
- This section can be used to appeal for funds, volunteers and other forms of support.
- Thank your donors and supporters for their unflinching support.
- Include a tear-off donation card if applicable and if possible.
- Provide details about your needs regarding funds, voluntary support, etc., so that it is easy for those wishing to contribute their resources.
- Provide a contact number, even if address details are provided elsewhere in the report.
- If your organisation and its work have been acknowledged or awarded, be sure to include the information in your report. This is a source of great motivation for your board, staff and other stakeholders.

**You can make a difference
to their tomorrow, today!**

Childhood is a memorable time for all of us. A time when we were showered with love by our families, protected from every difficulty and given everything to help develop our full potential. But for more than half of India's children, this is only a dream because 50% of children in India are deprived of education; more than half are malnourished and 25 million are orphaned.

The step YOU take today will enable Udayan Care to ensure children a secure future and a childhood they truly deserve. Your support will ensure children who are orphaned and abandoned, or living in adverse circumstances, their right to live, learn, play and develop. It will also ensure that girls with the drive to learn, are able to fulfill their dream of education.

In our experience of over 16 years, we have seen that no step is too small in the journey of child rights. In fact, each step taken by thousands of individuals and organizations, has enabled Udayan Care to transform the lives of more than 7500 individuals across 7 states of India.

Join Us.

To make your contribution please fill in the attached coupon and post it to:
Udayan Care, 16/97-A, 1st floor, Vikram Vihar, Lajpat Nagar IV, New Delhi 110-024

For more information, you can call us on 811-44348105/4, or visit us on www.udayan-care.org

Udayan CARE
• Empathy • Education • Empowerment

Udayan Care makes a fervent appeal to donors.

COMMUNICATION GUIDELINES

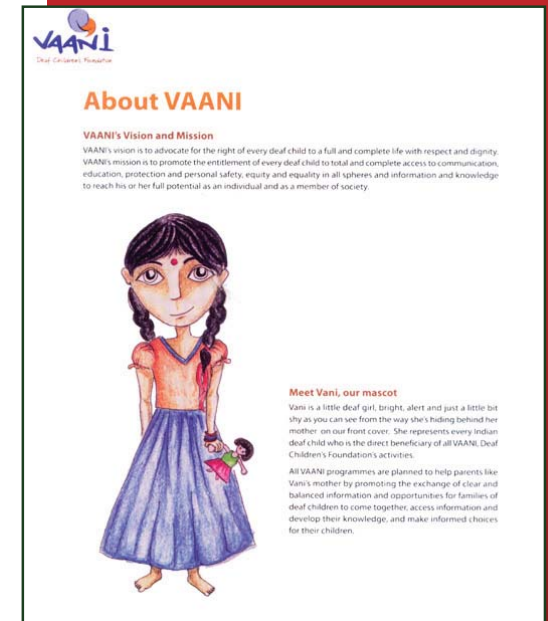
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Visual impact


The Annual Report communicates critical information to a wide stakeholder base. It has to effectively communicate through written content and visually so as to promote transparency. This might be a challenging task as NGOs may lack the requisite communication skills to package information succinctly yet attractively. Care should be taken to ensure that the Annual Report is neither too wordy nor too flashy with minimum substance. A good Annual Report has to balance information well with desirable design features.

What to keep in mind

- One of the key elements of building a strong brand is colour selection. Every colour has a different feel and various associations. By choosing a colour or a combination of colours for your brand identity, you will take on those associations. Colours will evoke certain emotions and feelings towards your brand so it is vital to choose a colour that will represent your identity effectively.



VAANI uses a mascot to provide a connect with the organisation and help recall it immediately.




COMMUNICATION GUIDELINES

- Use uniform colour and fonts throughout the Annual Report. In case you decide to use different fonts, it should be with good reason.
- Design an attractive cover page and arrange text, graphics, photos and additional content, such as dialogue boxes, creatively.
- Include photographs that are clear and not pixilated. Photographs serve as proof of achievement and enhance the appearance of the Annual Report.
- While using photographs of beneficiaries avoid individual pictures and depict them in groups instead. Obtain consent of the subjects in the photographs. Highlight this point in the Report so the reader knows that you are sensitive to the privacy of the individual.
- Ensure that the grammar used is accurate and that there are no typographical errors. Your Report should be easy to read. To do this, avoid use of too much jargon. Narratives should be concise and succinct.
- Make use of diagrams, graphs, pie charts, and flow charts that make your report less text heavy and easier to read.

Research suggests that people make subconscious judgments about a person, environment, or product within 90 seconds of initial viewing and that between 62% and 90% of that assessment is based on colour alone.





COMMUNICATION GUIDELINES

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- Provide photographs, case studies and testimonials as proof of work and achievements.
- Include direct messages to stakeholders from the Chief Functionary in the form of appeals and letters etc.
- Decide whether your Report will be electronic, in English or in regional languages.
- Base the Report on a theme to make it more interesting.

It should be noted that a good design or tasteful presentation need not be thought of as being an expensive affair. By giving it careful thought, it is possible to bring out a well designed and attractive Annual Reporting in a cost effective manner.



RATE YOUR ANNUAL REPORT

BASIC DETAILS	1	2	3	4
Organisation name, address and contact details (including phone numbers, e-mail addresses, names of key contact persons with designation)				
Organisation registration and tax exemption details				
Banking and Website details				
VISION & MISSION				
Organisation Vision, Mission, Values and Objectives				
Origin and brief history of the organisation				
ORGANISATIONAL GOVERNANCE				
General Body composition (with details of gender), meetings held and resolutions passed				
Governing Body composition details (with details of gender)				
Details of special governance systems eg. Advisory Committee, Local Community representation etc.				

CRITERIA

RATING

1-Poor

2-Satisfactory

3-Good

4-Excellent



RATE YOUR ANNUAL REPORT

HUMAN RESOURCES	1	2	3	4
Details of organisational structure (staff, volunteers, consultants etc) / organogram provided				
Disaggregated information on staff composition – Gender, Persons with Disabilities, PLHIV etc.				
Provision of social security (PF, medical re-imburement etc)				
Recognition of special contributions made by staff				
Salary ranges provided to staff				
PROGRAMME PERFORMANCE				
Description of the main activities undertaken for the reporting year.				
Details of geographic coverage (States, districts, blocks, villages), population covered and issues touched.				
Information about other stakeholders covered in programmes - eg. Government, Panchayats, etc.				

CRITERIA

RATING

1-Poor

2-Satisfactory

3-Good

4-Excellent

RATE YOUR ANNUAL REPORT

PROGRAMME PERFORMANCE	1	2	3	4
Information on achievements, response to various challenges and its impact on future plans of the organisation				
Provision of case studies to showcase the success and impact of the programmes undertaken (ensuring that privacy of individuals is maintained)				
Details on monitoring the progress of programmes				
Information on programme linkage to previous years				
Details on lessons learnt				
DONORS & FUNDING				
List of major donors and funding agencies (project wise for added value)				
Information on non monetary support received				
Information on community contributions if any				
NETWORKS & SUPPORTERS				
List of the networks that your NGO is a part of				

CRITERIA

RATING

1-Poor

2-Satisfactory

3-Good

4-Excellent

RATE YOUR ANNUAL REPORT

NETWORKS & SUPPORTERS	1	2	3	4
List of partnerships and a brief description on the type of association				
List of supporters with their due permission to maintain their anonymity if required				
COMMUNICATION & VISUAL IMPACT				
Use of colours (including brand colours) and fonts Design, layout and cover page				
Correct use of language and readability				
Use of photographs, case studies and testimonials				
Provision of executive summary, direct messages to stakeholders (letters of acknowledgement, message from Chief Functionary, etc)				
FINANCIAL PERFORMANCE				
Provision of abridged financial statement and income / expenditure statement				

CRITERIA

RATING

1-Poor

2-Satisfactory

3-Good

4-Excellent



RATE YOUR ANNUAL REPORT

FINANCIAL PERFORMANCE	1	2	3	4
Financial statement analysis and segregation of assets				
Details of internal audit				
Disaggregated statements of your funds / grants				
Financial statements are properly validated through signature of office bearers				
Disclosure of resources raised through sale of commodities like craft items made by beneficiaries				

CRITERIA

RATING

1-Poor

2-Satisfactory

3-Good

4-Excellent

