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# Local Group Annual Reporting 2020

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# Introduction to the local group annual report

Thank you for taking the time to complete your local group annual report. This report tells us about the funds you have raised this year, the activities you have been carrying out locally and also helps us to celebrate and showcase your achievements. It helps us show the difference we’re all making to people living with and at risk of diabetes, and to plan the support we provide for you.

Please complete all sections of the form relevant to your group and refer to the guidance document to help you. If you have any questions or need any help please speak to your local volunteering team or email volunteering@diabetes.org.uk

Who should complete this report?

The annual report should be completed by the chairperson and treasurer for the group. It’s also important you speak to other committee and group members about their activities this year, so that you can include everything that your group has done.

When does it need to be completed?

The deadline for completing and submitting the annual report is **Friday 22nd January 2021.** This is to allow time for our finance team to review the accounts, process the information and include them in our charity accounts ready for audit. If you require any additional support to reach the deadline, please speak to your local volunteering team.

What does Diabetes UK do with the information we provide?

After you have returned your form to us, we consolidate the financial figures and activity report information from each group and include these in our income and expenditure that form part of our annual audited accounts. Your group has a vital role to play in helping us to collate this information, which is why it is important for us to receive as much detail as possible. You can view a full and detailed version of our 2019 annual accounts on the website or available from your local volunteering team.

How do I submit our local group annual report?

When you have completed this report in full, **please submit it via email to your local volunteering team**. They will then review the report and come back to you with any questions before submitting to our finance team. Don’t forget to sign the annual return form on page 4, electronic signatures will be accepted. If you’re unable to email a copy of your annual report or would like a paper copy to complete instead, please speak to your local volunteering team. Don’t forget to keep a copy for your group.

**Please complete the following:**

|  |  |
| --- | --- |
| Group name |  |
| Name of person completing form and group role | Name |  |
| Role |  |
| Date completed  |  |

# Annual return information

Statement of receipts, payments and assets.

|  |  |  |
| --- | --- | --- |
| Receipts­ |  | Total for 2020 (£) |
| 1 | Donations |  |
| 2 | Grants |  |
| 3 | Legacies |  |
| 4 | Diabetes UK sales |  |
| 5 | Other sales |  |
| 6 | Bank interest |  |
| 7 | Total receipts (sum of lines 1-6) |  |
| Payments | 8 | Running costs and fundraising costs |  |
| 9 | Local activities and events |  |
| 10 | Diabetes UK merchandise for resale |  |
| 11 | Other purchases for resale |  |
| 12 | Diabetes UK Type 1 Events, holidays and weekends |  |
| 13 | Other Diabetes UK events and conferences (attendance fees) |  |
| 14 | Other payments or donations |  |
| Supporting the wider work of Diabetes UK | 15 | Total donations to Diabetes UK’s work |  |
| 16 | Total Payments (sum of lines 8-15) |  |
| Balances | 17 | Receipts over payments (7 minus 16) |  |
| 18 | Cash at bank at 1 January 2020 |  |
| 19 | Cash in hand at 1 January 2020 |  |
| 20 | Cash and bank balance at 31 December 2020 (add 17, 18 and 19) |  |
| 21 | Of which, cash at bank at 31 December 2020 |  |
| 22 | Of which, cash in hand at 31 December 2020 |  |

Tick this box if no activities for year ended 31st December 2020 [ ]

|  |  |  |
| --- | --- | --- |
|  | **Signature** | **Printed Name** |
| Treasurer |  |  |
| Chairperson |  |  |

# Bank reconciliation

Use the bank reconciliation to explain any differences between the value on your bank statement and how much money the group actually has. Differences might be because of cheques or deposits which have not yet cleared.

|  |  |
| --- | --- |
| Bank name |  |
| Account number |  |
| Bank sort code  |  |
| Balance as per bank statement 31 December 2020 Subtotal A | £­ |

|  |  |
| --- | --- |
| 1  | Deposits not cleared Amounts banked paid in up to the 31 December 2020, but not yet on bank statement |
| ­Date paid in | Source of money | Amount £ |
|  |  |  |
|  | Subtotal B |  |

|  |  |
| --- | --- |
| 2  | Payments not yet cleared Cheques drawn paid out up to the 31 December 2020, but not yet on bank statement |
| ­Date | Cheque no. | Payee | Amount £ |
|  |  |  |  |
|  |  | Subtotal C |  |

|  |  |  |
| --- | --- | --- |
| 3  | Cash at bank Subtotal A plus B, minus C – this should be same as item 21 on statement of receipts, payments and assets (page 4) | £ |

# Legacies received

Please provide a copy of any documentation received with the Legacy, for audit purposes.

|  |  |  |  |
| --- | --- | --- | --- |
| Name of deceased person(s) | Amount left to the group | Are there any restrictions on how the money is allowed to be used? | If yes, what activity is the legacy restricted to? |
|  | £ | [ ] Yes [ ] No |  |
|  | £ | [ ] Yes [ ] No |  |
|  | £ | [ ] Yes [ ] No |  |

# Grants and restricted donations

Information on grants and restricted donations received in year to 31 December 2020. Please provide a copy of the documentation which outlines the restriction details.

|  |  |  |  |
| --- | --- | --- | --- |
| Name of organisation/ company/ Individual  | Value of grant or donation | Are there any restrictions on how the money is allowed to be used? | If yes, what activities is the grant or donation restricted to? |
|  | £ | [ ] Yes [ ] No |  |
|  | £ | [ ] Yes [ ] No |  |
|  | £ | [ ] Yes [ ] No |  |

# Group Assets

Have you purchased any assets worth more than £2000 during this financial year (Jan to Dec 2020)? If so, please list them here.

|  |  |  |
| --- | --- | --- |
| Asset Description (ie laptop, projector etc) | Year asset was purchased | Estimated value of asset (at the time of purchase) |
| **9** |  | £ |
|  |  | £ |
|  |  | £ |

# Supporting the wider work of Diabetes UK

Please complete the table below to let us know how much you hold in reserve, and what you would like to do with the excess funds over £3,000 at the end of 2020.

|  |  |
| --- | --- |
| Excess held over £3,000: | £ |
| Amount donated to Diabetes UK | £ |
| Amount group is retaining for planned activities | £ |

If you are planning to retain funds for planned activities, please read the guidance document and complete the section below.

# Retention of funds plan

|  |  |
| --- | --- |
| Total amount group would like to hold over £3,000 for planned activities | £  |
| Please tick any of the following options that apply or delete as appropriate |

|  |
| --- |
|[ ]  We only fundraise occasionally, e.g. a big fundraiser every three years to generate your running costs. |
|[ ]  Our group has been given a legacy or restricted monies for which there is an agreed plan for spending the money. |
|[ ]  Our usual planned budget is more than £3000 (e.g. you run a large holiday for local children every year). |
|[ ]  We run activities infrequently (e.g. you are raising funds to run a big event in several years’ time). |
|[ ]  Other (please specify below): |

 |

You’ll now need to complete the next section which provides us with full details about your plans for retaining funds over £3,000 and what you will spend the money on. Please provide as much information as possible.

If you do not provide full information we will not be able to confirm and agree your planned activities until we have received the required details.

|  |  |
| --- | --- |
| Please provide full details of the proposed project or activity |  |
| Please say who the proposed project or activity will benefit, for example older people with diabetes, those at risk of developing Type 2 diabetes, young adults, children and families etc. |  |
| Please detail how long, from start to completion, the proposed project or activity will take, including the length of time for planning, preparation, implementation and finalising |  |
| ­Please tell us how much the proposed project or activity will cost, giving approximate costings (e.g. travel, stationery, literature, venue hire, food and drink). Please state when the money will be spent by. |  |

# Activity report

The activity report tells us about the activities your group has been carrying out locally this year and what you would like more support with in the future. Please complete this section as fully as possible by using the tick boxes and free text options where appropriate.

|  |  |
| --- | --- |
| Who does your group support?(Tick all that apply) | [ ]  Adults with Type 1 diabetes[ ]  Adults with Type 2 diabetes[ ]  Children and families with diabetes[ ]  Other (please specify below): |
| Approximately how many people has the group supported this year? For example at regular meetings, awareness events, trips and activities including residential events. | [ ]  Less than 20[ ]  20-40[ ]  40-60[ ]  60-80[ ]  80-100[ ]  100-120[ ]  More than 120 |
| What kinds of activities have the group organised outside of your regular group meetings?  | [ ]  Fundraising events[ ]  Know Your Risk[ ]  Stalls/awareness stands at local events[ ]  Fitness or activity classes[ ]  Social activities and outings (e.g. day trips)[ ]  Overnight or weekend trip[ ]  Other (please specify below): |
| Apart from the three main officer roles (chair, treasurer, secretary), how many people are part of your committee?  |  |
| Thinking back over 2020 what would you say is the one major achievement your group is most proud of? Why? |  |

|  |  |
| --- | --- |
| What would you say are the main concerns and needs of people with diabetes in your local area?  Please tell us how the group identified those needs and your activities to provide support in these areas?   |  |
| Which campaigns or activities have you linked in with or supported during 2020? (Tick all that apply) | [ ]  Know Your Risk activity[ ]  Diabetes Week [ ]  Fight for Flash Campaign[ ]  It’s Missing Campaign[ ]  Food Upfront Campaign[ ]  Volunteers Week[ ]  World Diabetes Day (14th November)[ ]  Other (please specify below): |
| Please give us more details of how you have linked with the above activities, e.g. events you have attended, what influencing work you have taken part in locally etc. |  |
| Does your local group run regular meetings or activities for children? | [ ]  Yes[ ]  NoIf yes, please give brief details: |

# Support, resources and training

We want to improve the lives of people with and at risk of diabetes across the UK and our local groups help to make this possible. We’d like to know how we can better support you so together we can help more people.

|  |  |
| --- | --- |
| What do you feel has been the biggest challenge in running the group this year? (Tick all that apply) | [ ]  Finding new committee members[ ]  Finding speakers[ ]  Finding the right venue[ ]  Declining numbers of people coming to the group[ ]  Encouraging new people to attend to meetings and other activities[ ]  Fundraising to keep the group going[ ]  Providing support to people with Type 1 diabetes[ ]  Providing support to people with Type 2 diabetes[ ]  Providing support to parents of children with diabetes[ ]  Managing the groups finances[ ]  Making links with local healthcare professionals[ ]  Engaging with Diabetes UK campaigns[ ]  Other (please specify below): |
| What support or guidance would you find most useful to allow you to better support people living with or at risk of diabetes locally?(Tick all that apply) | [ ]  Welcoming new committee members [ ]  Organising and running group meetings [ ]  Communicating with healthcare professionals [ ]  Fundraising[ ]  Campaigning [ ]  Peer support [ ]  Community outreach – building or strengthening relationships with people in your local community [ ]  Representing Diabetes UK at events [ ]  Succession planning to support potential new committee members[ ]  Keeping safe, legal and healthy[ ]  Other (please specify below): |
| What would help you to better support people living with or at risk of diabetes locally? (Tick all that apply) | [ ]  Opportunities to network with other groups[ ]  Opportunities to go to another groups’ meetings[ ]  Opportunities to attend training sessions[ ]  Access to more online templates that can be adapted for local use[ ]  Online training and support or online guides (learning that is available online and can include videos)[ ]  Other (please specify below): |
| Is there any more support we can give your local group that we aren’t offering already?  |  |
| Would you like to make any other comments? |  |

Thank you for taking the time to complete your local group annual report for 2020. When you have completed your report please submit to your local volunteering team and don’t forget to keep a copy for your group.

Thank you for all that you do to support people living with, and at risk of, diabetes in your local community. Your support means together we can keep fighting for a world where diabetes can do no harm. We couldn’t do it without you.