



PART C – SUMMARY INFORMATION RETURN

To be completed if your charity's gross income is more than £1 million

This return is intended to comprise a summary of the key information in the Annual Trustee's Report and Accounts and in other documents.

Charity name:

Charity number:

Financial year ending:

Question 1: The charity's aims

What are your charity's aims?

Further details can be obtained from:

Question 2: Who benefits?

a) Who benefits from the charity's work?

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•
•

b) How do you respond to their needs and how do they influence the charity's development?

Further details can be obtained from:

Question 3: The charity's strategy

a) What are the key elements of your charity's medium to long-term strategy?

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b) How does your charity measure the success of the strategy?

Further details can be obtained from:

Question 4: The charity's objectives and achievements

What were your charity's main annual objectives and were they achieved?

Objective	Achievement
•	
•	
•	
•	

Question 5: The charity's income and expenditure

a) What were your charity's sources of income in the year?

Income source	% of incoming resources	£ 000
1. Voluntary income		
2. Activities for generating funds		
3. Investment income		
4. Incoming resources from charitable activities		
5. Other incoming resources		
Total	100%	

b) What were your charity's most significant activities in the year, and how much did it spend on them?

Charitable activities	Cost £ 000
•	
•	
•	
Other	
Total expenditure on charitable activities	
Total expenditure	
Explanatory comments	

c) What were your charity's three main fundraising activities in the year, and how much did each generate and cost?

Fundraising activity	Income generated £ 000	Cost of activity £ 000
1.		
2.		
3.		
Other		
Total voluntary income and activities for generating funds		
Total cost of generating voluntary income and fundraising trading		
Explanatory comments		
Further details can be obtained from:		

Question 6: The charity's financial health

How would you describe your charity's financial health at the end of the period?

Further details can be obtained from:	

Question 7: The next year

a) How will the overall performance last year affect your charity's medium to long term strategy?

b) What are your charity's main annual objectives for the next year?

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Further details can be obtained from:

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Question 8: The charity's governance

How does your charity ensure that its governance arrangements are appropriate and effective?

Further details can be obtained from:

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Please also ensure that you have submitted Parts A and B of the Annual Return 2007

DECLARATION

Those who give answers that they know are untrue or misleading may be committing an offence.

I certify that the information given in this form is correct to the best of my knowledge and has been brought to the attention of all the trustees.

Signed

by one of the charity trustees on behalf of all charity trustees:

Date:

Title:

Full Name:

Daytime telephone number:

You may find it useful to keep a copy of your completed form.

CONTACT DETAILS

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