

Sample annual report and financial statement formats

Two sample annual report formats are provided below. Sample 1 indicates the minimum information that should be provided in an annual report. Sample 2 illustrates a more detailed approach.

Annual report – Sample 1

ANNUAL REPORT

[Name of School]

[Date of Submission]

1. Begin with a warm opening statement addressed to parents and the school community, including an open invitation to attend all school council meetings.
2. List the names and positions (e.g., council chair, secretary) of and the group represented by (e.g., parents, students, teaching/non-teaching staff, the community) all current school council members.
3. Name, identify, and acknowledge the efforts and commitment of outgoing school council members from the previous year.
4. List the dates of the previous year's school council meetings, as well as any available information on upcoming meetings.
5. Include a financial statement if the school council held any fundraising events. (See financial statements provided later in this tip sheet)

Annual report – Sample 2

[Name of School] Council

Annual Report for the [insert year] School Year

Dear Parents and School Community:

Welcome back! We hope you had a safe and happy summer. The [name of school] School Council had a very rewarding [insert year]. The school council held [number] meetings on [list dates] and worked on various issues during the year including [insert list]. These meetings were open to the public to encourage input from parents and other members of the school community.

The purpose of the school council is to help improve student achievement and to enhance the accountability of the education system to parents. School councils are advisory organizations. A school council's primary means of achieving its purpose is by making recommendations to the principal of the school and the school board. Boards and principals are responsible for considering the recommendations made by each school council and for advising the council(s) of the actions taken in response to the recommendations. Accordingly, included with this report is a summary of the advice that the school council provided to the principal and to the school board in [insert year], as well as the responses from the principal and school board on how this advice was taken into account in decision making [attach summary of advice and responses] .

Additional achievements of the school council in [insert year] included the following: [insert list]. Fund-raising activities were also conducted, and the proceeds were used to fund projects in accordance with school board policies. These fund-raising activities are identified in the attached financial summary entitled "Sources and Uses of Project Funds". Another summary of financial activity related to the school council's administrative activities, entitled "Sources and Uses of Operating Funds", is also attached. Minutes of meetings held and financial records are available for public inspection at the school office.

We wish to acknowledge the hard work and dedication of the many individuals who volunteered their time to contribute to the success of the school council last year. Special thanks are due to the following members of the [insert year] school council: [provide list]. Finally, we would like to wish the best of luck to candidates in the September [insert year] school council elections. Issues that we foresee as being important matters for the consideration of the new school council following the September [insert year] elections include [insert list].

Sincerely yours,
[insert the name of the chair or co-chairs]
Chair
[insert date]

Financial Statements

In the following two sample financial statements, “project funds” refers to fundraising done for specific projects; “operating funds” refers to the ongoing operation expenses of the council. *Note:* School councils shall not engage in fundraising activities unless the activities are conducted in accordance with applicable policies established by the board.

Financial statement – Sample 1

<i>The [name of school council]</i>			
Sources and Uses of Project Funds for the Year Ended August 31, 20XX			
Cash on hand for projects at the beginning of the period (September 1, 20XX)	\$227.64		
<i>Add revenues:</i> Net funds raised (see Analysis 1 below)	<u>717.11</u> \$944.75		
<i>Subtract expenditures:</i> Project expenditures (see Analysis 2 below)	– <u>\$746.00</u>		
Project cash on hand at the end of the period (August 31, 2011)	\$198.75		
Analysis 1: Net funds raised			
Activity	Expenditure	Receipts	Net proceeds
Candy bars	\$137.48	\$340.00	\$202.52
Milk	383.16	510.00	126.84
Fun run	8.73	65.00	56.27
Raffle	86.02	417.50	331.48
Totals	\$615.39	\$1,332.50	\$717.11
Analysis 2: Project expenditures			
Project	Expenditure		
Instrument repair (recorders)	\$300.00		
CDs for music program	296.00		
Bus subsidy for Grade 6	150.00		
Total	\$746.00		

Financial statement – Sample 2

**The [name of school council]
Sources and Uses of Operating Funds for the Year Ended August 31, 20XX**

Operating cash on hand at the beginning of the period (September 1, 20XX)		\$147.12
<i>Add allocation from board</i>		<u>500.00</u>
		\$647.12
<i>Subtract operating expenditures (see breakdown below)</i>		
Expenditures		
Postage	\$291.27	
Photocopies	176.63	
Miscellaneous	42.92	
Total		- <u>\$510.82</u>
Operating cash on hand at the end of the period (August 31, 2011)		\$136.30