



Accountability Report Guidelines

Accountability reports are a condition of receiving a non-taxable grant or donation from the Olive Tree Charitable Trust (OTCT). As recipient, you or your organisation is required to submit a report to the Trust Secretary upon project completion, or annually, as part of financial accountability and transparency processes which apply to both the donor (OTCT) and recipients.

The required accountability report relates to your specific project, as detailed in your grant application, or as subject to conditions specified by the Trust.

An accountability report is simply a **brief** report or update on the project outcomes, and is one of the conditions attached to your grant, as specified in OTCT's letter sent advising you that your organisation's funding application has been successful. Below are some suggested topics you might consider including, when appropriate, in your Accountability Report being:

The Project:

- ☐ Did your project proceed as stated in your grant application, or did a major change to the project become necessary (*if so, provide details*)?
- ☐ Has your project been completed, or has been extended (*if so, explain why*)?

Project Participation

- ☐ How many people actively participated or were involved in your project?
- ☐ Was this more than, less than, or as expected?
- ☐ Has project participation grown, declined, or been stable over time?
- ☐ Have your membership numbers grown, declined or been stable as a result?
- ☐ Was it open to just your members, a section of the community, or the general public?
- ☐ Were participants invited, or referred (*if so, by whom?*), or selected (*if so, by what criteria*)?

Involvement of Members or Others

- ☐ How many of your members were involved in your project?
- ☐ Were any selection criteria necessary? e.g. qualifications, First Aid, Police checks

Project Funding

- ☐ Did your project keep to budget?
- ☐ Did you manage to receive all the third party funding applied for or promised?
- ☐ How much did your organisation contribute financially to the project?
- ☐ What funding is still required to commence or complete the project?
- ☐ What grant funding is still to be spent?
- ☐ Was there a deficit in project funding? If so, how will you cover it?
- ☐ Was there any project funding left over? If so, would you like to apply to reallocate it?
- ☐ Has the project helped enlarge your support or funding base?

Project Benefits

- ☐ Do you consider your project was a success (*please explain*)?
- ☐ What project feedback has been received?
- ☐ How has the project benefitted your organisation, either as a section, or as a whole?
- ☐ Upon reflection, what changes or improvements would you make?

Please check that all documentation is ☐ **dated** and you have provided ☐ at least one **contact name**, ☐ **telephone**, and/or ☐ **e-mail address**.

If possible, please e-mail your accountability report in **PDF format**. Thanks.

Should you have any questions, please do not hesitate to contact Trust Secretary:

E-mail: secretary@olivetreetrust.org

Mobile: (027) 506 8200 [*preferably outside work hours*]