Tier 4 resources to help

Charities Services Webinar 3 November 2020

Getting started

This **video** is useful to get a quick overview of reporting if you are new to it or you need to show your board or a new committee member.

The Annual Reporting Guide for Tier 4 Charities

The Annual Reporting Guide for Tier 4 charities (this is our most comphrehensive guide), the **Get started videos**, and links to download the **Standard, template and guidance notes.**

The Annual Return Checklist for Small Charities

- This checklist identifies the key things you need to record through the year to complete your annual return and performance report. **Download here.**

How to complete your performance report and Annual Return

- This resource is intended to help Tier 4 charities complete their performance report and submit their annual return. **Find out more.**

Tier 4 minimum categories

- The Tier 4 performance report sets out minimum categories that must be used in preparation of the Statement of Receipts and Payments and Statement of Resources and Commitments. **Find out more.**

Tier 4 member and non-member receipts

- In the Statement of Receipts and Payments, money received from members is to be recorded separately to money received from non-members. **Find out more.**

Related party transactions for Tier 3 and Tier 4 charities

- The Tier 3 and Tier 4 financial reporting standards require charities to report related party transactions. Related party transactions are recorded in the Notes section of the performance report. **Find out more.**

Does your Tier 4 charity control another or other organisations?

- Tier 4 charities in this situation may need to include information about these organisations by providing a consolidated performance report. **Find out more.**

Tier 4 reporting webinars

Here you will find a number of different webinars to support you in completing both your performance report and annual return.

Tier 4 charities – Tour of the performance report

- In this webinar we explain: What a performance report is, how it fits in with your charity's annual return, what you need to complete one and how it can help your registered charity.

Annual reporting – An overview for Tier 3 and 4 charities

- This webinar covers: What are the annual reporting obligations for registered charities, the different components of annual reporting and resources available to help you prepare to report.

Minimum categories in the performance report

- In this webinar we cover: What the minimum categories are and the rationale for each category, how to determine which category to record items under and guidance on breaking down and renaming the minimum categories.

Good practice in grant management and reporting

- This webinar talks about some of the more common conditions related to grants, and practices you can implement to meet them. The webinar covers some basic practices for governance and financial reporting and explains some controls you can put in place to help ensure that your charity stays financially healthy and keeps meeting its funders' requirements.

Statement of Service Performance

- This webinar covers: How to make the Statement of Service Performance work for your charity, what outputs and outcomes are and how you can use the Statement of Service Performance to celebrate your charity's successes

Is being a charity still right for you?

- **Winding up information**
- **Deregistration information**
- **Deregistration form**

Blogs

- **Is being registered with Charities Services still right for your organisation**
- **Ending a charity – What to do with what's left**

Tier 4 example performance reports

On this page, you'll find Tier 4 example performance reports to help you prepare your own. Some of the examples were completed in 2016, soon after the new reporting standards were implemented.

Therefore, some may not include comparative information to their previous financial year. To comply with the financial reporting standards, your performance report must include comparative information to your previous financial year, also called the 'Last Year' column in the template. **Download here.**

Online Clinics

Come and talk to our team and get answers to the questions you have about being a registered charity. We have a range of appointments available depending on what questions you need answered. Financial reporting, funding, registration and general appointments are available with Charities Services and Hāpai Hapori Community Operations staff.

There are appointments available every Thursday. Register for one appointment, or multiple, depending on the help you need.

Once you have booked an appointment, we will be in contact to organise a Zoom or phone call appointment for the time and date that you have booked.

Appointments are for 20 minutes so please be on time. Please let us know if you can't make your appointment so we can see someone else. **Click here for online clinics.**

NB: If you have specific questions about your rules documents, your performance report or your annual return please have these documents on hand.

Contact us

Email info@charities.govt.nz

Freephone (within New Zealand)
0508 CHARITIES (0508 242 748)

Calling from outside New Zealand
+64 9 339 0848

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