

Update

March 2009

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Update on *Update*

Many thanks to everyone who took part in our readership survey of *Update* – we appreciate your time, and your comments.

What did you tell us?

258 people took part in the survey, and:

- 94% rated it as 'excellent' or 'good' overall
- 96.8% rated the relevance of content as 'excellent' or 'satisfactory'
- 90.8% rated the style and clarity of layout as 'excellent' or 'satisfactory'
- 93.2% rated the ease of reading as 'excellent' or 'satisfactory'
- 72% rated the existing (monthly) frequency as 'fine as it is'
- 86.5% rated the existing length as 'just right'
- 51.4% of respondents pass their copy on to others
 - 38.9% of those pass it on to between 2-5 people
- 70.1% keep their copy for reference

Many of you also provided helpful comments and suggestions, and we are working through those, including feedback asking us to improve the layout of the *Update* email.

Until now, we have emailed *Update* in a "plaintext" version, which is a small file that is very quick to open. The main drawback of plaintext emails is that they don't look very appealing to read, because they have no formatting, such as **bold**, *italics* or **colour**. Some e-mail programs only accept plaintext e-mails.

For this issue, we are trialling an "html" email, but we've tried to keep it simple, so most people can still open and read it easily. We're aware that some people are still using dial-up internet access! If you have any comments, you are welcome to email us back – update@charities.govt.nz

We have also made our Registration update briefer (but we have kept the Snapshot, since many readers said they find it useful).

This *Update* focuses mostly on Annual Returns – including helpful tips for filing.

Registration update

As at 4 May 2009 we have registered 21,060 charities, which are now shown on the **Charities Register**.

Snapshot

Overview of types of charities registered as at 31 March 2009

The “big three” most common:

Sectors – Education/Training/research, Religious activities, Other Activities – Other, Provides services (e.g. care, counselling), Provides religious services/activities

Beneficiaries – General public, Children/young people, Other

Areas of operation were as follows (note: the total is greater than the total number of registered charities, as some organisations tick two or more categories on their application):

New Zealand	
Auckland – 3,508	Northland – 1,109
Bay of Plenty – 1,369	Otago – 1,366
Canterbury – 2,303	Southland – 759
Chatham Islands – 36	Taranaki – 664
Gisborne – 376	Waikato – 1,702
Hawkes Bay – 930	Wellington – Wairarapa – 2,148
Manawatu - Wanganui – 1,203	West Coast – 420
Nelson - Marlborough - Tasman – 898	Nationwide – 4,699
Overseas	
Africa – 365	North America – 221
Antarctica – 28	Oceania – 689
Asia – 745	South America – 199
Europe – 284	

Wondering when your Annual Return is due?

Your Annual Return is due within six months of your balance date (the end of your financial year). So if, for example your balance date is 31 March your return is due by 30 September.

You can check your balance date by looking at your details on the Charities Register.

If you would like to use your return to report changes to your organisation you can do so (instead of using a separate *Notification of changes* form). But then you must send the Return within three months of the date of the change or you becoming aware of it.

We will remind you when your Annual Return becomes due and send you some information about how to access the online and paper forms.

We have published two information sheets to help you with your Annual Returns:

- **Annual Returns Checklist**
- **Annual Returns under the Charities Act**

You can also call our free information line **0508 242 748**.

Annual returns tips

IRD numbers on financial statements

In the public interest, the Charities Commission doesn't publish the IRD numbers provided on applications for registration on the public Register, but we have noticed that some charities (or their tax advisers) have included their IRD number on the financial statements they have filed with their Annual Returns.

We'll try to blank out the IRD number on your financial statement if we see it has been included, but the best option is for you to blank it out first (preferably with a marker pen) before sending us your Annual Return.

Rounding numbers on Annual Returns

The instructions on the Annual Return form ask you to enter numbers "rounded to the closest thousand dollars".

For example: If your income is \$327,689, enter \$328,000 (don't show it as just "\$327").
If your income is \$18,209,023, enter \$18,209,000

If the value is *less than* \$1000, simply enter the nearest whole number (and drop the cents).

For example: If your income is \$834.45, enter \$834.

Note that there are no zeros (for cents) shown after any of these figures.

Payment of Annual Returns fee

If you have a gross income of \$10,000 or more and need to pay an Annual Return fee, you can pay it by either cheque or internet banking. If you prefer to pay by internet banking, call us on **0508 242 748** for our bank details.

We are currently amending the print and online version of *Form 4* to include the Commission's bank details for making payments, and will also include reminders about the fee and how to pay it in the form itself.

Annual Returns experiences – your feedback

We recently asked registered charities about their first experience filing an Annual Return with us. More than 350 charities replied to our survey, and told us that::

- 43.2% had their treasurer/bookkeeper complete their Annual Return
- 85.8% *didn't* require any professional help to complete their Annual Return
- 19.8% found it 'very easy' to complete
- 37.8% found it 'quite easy' to complete

- 7.7% found it 'quite difficult' or 'very difficult'
- 80.9% took less than one hour to complete their Annual Return

Regarding Question 25 (which asks for financial information):

- 14.4% found it 'very easy' to complete
- 35.1% found it 'quite easy' to complete
- 37.6% found it 'OK' to complete

After collating all the information needed to complete Question 25:

- 42.3% took less than 10 minutes to complete the question
- 43.2% took between 10 minutes and 30 minutes to complete the question
- 1.2% took more than two hours to complete the question
- 20.4% of people said the information provided about Annual Returns was 'very helpful'
- 32.9% said it was 'quite helpful'
- 33.2% said it was 'OK'

The Commission is now making some changes to the **Annual Return form - Form 4** – to help clarify our instructions for completing the form and paying fees (if applicable). The changes will be “live” shortly.

New appointments – new direction for Commission

The Charities Commission has rearranged its structure so it can focus more of its resources on the monitoring and investigation of charities, and provide governance and management education.

Under the new structure, three general managers now manage the Commission's Registration and Compliance, Corporate services, and Education functions.

Chief executive Trevor Garrett says the new structure reflects the changing role of the Commission, and the services it must deliver to the charitable sector and to the public. He has appointed two of the Commission's existing managers, and made one external appointment to the three new roles. The new general managers are:

Chris Winstanley – Registration and Compliance

(Mrs) Chris Winstanley has moved from her role managing the registration of charities to a broader role, taking responsibility for the registration of charities, operations, and monitoring and investigations.

Before joining the Charities Commission, Chris held senior roles with the New Zealand Qualifications Authority and Christchurch College of Education. These roles, and others in education, particularly in rural areas, means she has a strong understanding of the significant part volunteers and voluntary organisations play in helping communities thrive.

Chris's recent voluntary roles have included being treasurer and director for Habitat for Humanity (Porirua) and treasurer for St Michael's Anglican Church.

Barry Hayman – general manager, Corporate

Barry Hayman has moved from being Corporate Services manager to the

new role of general manager, Corporate.

Formerly, Barry was manager, Finance and Assurance with the Foundation for Research, Science and Technology, where he was responsible for its financial reporting and management. Before that, he was the Group Accountant for a publicly-listed company.

Philip Kearney – general manager, Education

Philip Kearney has joined the Commission as general manager, Education, responsible for scoping and managing the delivery of governance and management education and support for the sector.

Before joining the Commission, Philip was chief executive of Sport Wanganui. He has also held roles with the Universal College of Learning (UCOL), where he was business development manager, and as chief executive of Enterprise Wanganui, the local economic development agency. He has had experience in advising small businesses and not-for-profit groups; and has held education roles in strategic planning, management, marketing and human resources.

He was a member of the World Vision board for more than ten years, and has also served on and helped a number of boards in his local community.

Inland Revenue guide for donee organisations

Inland Revenue have produced a helpful guide for donee organisations – you can access a copy [here](#). As part of your marketing, or simply to provide information, you might like to send copies to current or potential donors to your charity.

Improvements planned to Commission's website

To make our information easier to find, the Charities Commission is re-organising and updating its website.

Part of the process is to create simple menus, so information is grouped where you'd expect to find it. If you have five minutes to spare, and would like to help us do this, we'd really appreciate it!

The task is simple – just 'drag and drop' information items into menu categories. It's quick and it's fun!

Re-organise the website

No longer want Update?

If you no longer wish to subscribe to this newsletter, simply email update@charities.govt.nz and type "unsubscribe" in the Subject field.



Update is a regular newsletter of the Charities Commission.

If this is not your copy and you wish to subscribe, simply email info@charities.govt.nz with your contact details or call our free information line 0508 242 748. Use these channels or visit our website at www.charities.govt.nz for further information about registration under the Charities Act.