

# Template Training Tuesday: Quarterly & Annual Reports



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# Overview

- 1. Welcome**
- 2. What are Quarterly & Annual Reports?**
- 3. Why should God's workers use it?**
- 4. How can you adapt it to your organization?**
- 5. What if you used it? (Testimony)**
- 6. Q & A**
- 7. Wrap-up**



# What is a quarterly report?

- A quarterly report is an update of efforts for a church or ministry that reveal what we value.
- It must NOT be merely a quarterly update of results. Why? We cannot control results. We could be unfaithful in our work and have good results or faithful and have limited results.
- It is an update of faithful activities and related results that gives glory to God.



# What is (included in) a quarterly report?

**Quarterly reports contain PROGRAM updates:**

- **qualitative content (feedback, survey results)**
- **quantitative measures (# of trainings, # courses)**
- **fruits or outcomes (# of participants)**

**Quarterly reports contain PARTNERSHIP updates:**

- **communications (emails, social media)**
- **activities (proposals, meetings)**
- **fruits or outcomes (# of givers, \$ in giving)**



# What is (included in) a quarterly report?

**Quarterly reports contain POLICY updates:**

- **governance matters (new members, orientation)**
- **compliance issues (gov't filings, legal review)**
- **fruits or outcomes (functional board oversight)**

**Quarterly reports contain PROJECTION updates:**

- **financial position (look back, fiscal year to date)**
- **forecast (looking ahead, estimate)**
- **fruits or outcomes (quarterly financials)**



# What is an annual report?

**Corporations must provide an annual report to stakeholders. For churches and ministries, it is an "annual update on the progress of your collective pursuit of your purpose." It reaps these fruits:**

- **Clarity of purpose, mission, vision, and values**
- **Unity among constituency groups**
- **Greater volunteerism, giving, and prayer support**
- **Increased trust, transparency, and reputation**



# What is (included in) an annual report?

**Church or ministry annual reports include:**

- **Bible verses and celebrations of God's goodness**
- **Pictures of real people served**
- **Statistics and stories of impact**
- **Highlights of the current year**
- **Update of programs and partnership**
- **Financials from independent auditors**
- **Peer accountability seal verifying compliance with standards**



# **Why should God's workers use them?**

**God's workers should use quarterly and annual reports that report faithful activities and fruits for at least five reasons.**

- 1. Follows Biblical Pattern: God's workers do faithful work, God supplies the fruit, and sharing the news encourages people (Acts 2:42-47).**
- 2. Strengthens Governance: Board can't make sure staff is on track without reports.**





# Why should God's workers use them?

- 3. Increases Confidence:** Quarterly and annual reports increase transparency. This grows trust among all constituents and grows participation.
- 4. Mobilizes Assistance:** When we have needs, on a quarterly or annual basis, reports rally timely help.
- 5. Ensures Sustainability:** With regular reporting, it makes sure that people stay engaged. Without engaged people you don't have sustained ministry.



# How can you adapt them to your organization?

**GTP has four primary quarterly reports:**

- 1. Quarterly Dashboard – Governance and Compliance Committee Report (TTT #2)**
- 2. Financial Snapshot – Finance and Audit Committee Report (TTT #7)**
- 3. Partnership Calendar – Partnership & Communications Committee Report (TTT #9)**
- 4. Programs & PAGs – This quarterly report serves our Programs and Standards Committee.**



# How can you adapt them to your organization?

To view a sample annual report from GTP that has the components we mentioned, visit [gtp.org/download/1048](https://gtp.org/download/1048).

We built this with a tool called Canva and you can do the same thing for your organization with minimal effort.



**What if you did quarterly reports and an annual report?**

**What outcomes can your church or ministry anticipate?**



**GREGG CAPIN**  
GTP Board Member



# Questions & Answers



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# Next Template Training Tuesday...

**4 May 2021**  
**12 noon GMT**

**FINANCIAL  
SNAPSHOT**



**RUTHIE CRISTOBAL**



**MATTHEW GADSDEN**



**MANJU GEORGE**



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