

ANNUAL REPORTS

an underrated resource

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Whilst reading, for various reasons, a number of annual reports it has struck me again and again how the use and value of annual reports appear to be so underestimated. It is maybe an attitude of mind that views the writing of the annual report as a mandatory chore or, where it is not legally required, as an optional extra.

For government departments and other constitutional institutions it is a legal requirement, in terms of the Public Finance Management Act of 1999, for the accounting officer to provide an annual report on the activities of his/her department, trading entity or constitutional institution during that financial year. What is to be reported upon is very clearly defined in the Act.

In the business world, every publicly-listed company is obliged to produce an annual report which must satisfy the minimum requirements of the Companies Act 1973, the statements of Generally Accepted Accounting Practice and the requirements of the Johannesburg Stock Exchange.

However, my concern is the annual reports of individual library services, individual libraries and even divisions or sections within a library.

A management tool

The preparation for the annual report can be an invaluable management tool for the manager, supervisor, or departmental or section head.

An annual report goes hand in hand with the business plan which defines the activities of the coming year in terms of what is required to be achieved, by whom, with what resources, within which time frames and the expected outcomes according to specific criteria.

Writing an annual report, on the other hand, requires looking back on the past year, reviewing what was intended to be achieved within the limits of both time and resources, what

was actually achieved, what was not achieved and why. This activity of reflection is crucial for any organisational or programme development - a critical element in the planning, implementing, evaluating, and learning cycle.

Public relations or promotional medium

The outcomes of this process of reflection carried out by management, individually or jointly, then need to be communicated to the different audiences that make up the library's public.

To be really effective, annual reports must be prepared with specific audiences in mind. Because different messages, or stories if you like, need to be told to different audiences, the report writer must be very clear what must be told to whom and how - in which process lies the further usefulness and beauty of annual reports.

It appears to me that there are four distinct audiences for any report, viz.

- the staff in the library or section
- other libraries or sections
- the controlling body whether councillors, library committees or management
- the public served by the library or section.

For staff, annual reports are a record of their achievements both qualitatively and quantitatively and an opportunity to acknowledge to a wider audience their efforts on behalf of their library or section.

Other libraries and more specifically other librarians concentrate more on the operational details - to compare facilities, statistics, learn about new services, policies and processes developed to meet changing needs and circumstances or different ways of doing regular routines.

Since I am really only discussing annual reports I am not going into the importance of writing up new services, processes

or ways of doing things for local professional journals as a way of sharing, cooperating and helping to establish and maintain a body of library expertise and making it available to all. But very often, mention in an annual report may create an interest in an event or process that can then be written up for wider distribution.

The controlling bodies, whether internal or external, and the public whom the library serves, really only require highlights, preferably achievements. Opinions differ whether the annual report is the appropriate medium to, to put it frankly, complain about lack of resources, support, et cetera. My suggestion would be to emphasise how much more could be done if support in different ways was forthcoming - same message but only in a more palatable form.

However, very few libraries have the resources to provide separate or different reports for these different groups - not only providing them with the information they require but also presenting it in an attractive, easily read and easily comprehensible style. It may be worthwhile to produce two reports in one - a brief synopsis of the highlights and a more detailed account as well. But brevity and clarity are of the essence.

A historical record

All libraries keep records and files but for a relatively easy and less time-consuming way of learning about the history of an organisation or finding out about a particular event, past annual reports cannot be bettered - particularly when the source documents themselves cannot be easily retrieved. Not only do previous annual reports provide historical information, they also create a sense of the development and growth of an organisation, the differing priorities over the years, the organisation's responses to various external influences and the response of the public to libraries, not to mention the feeling of déjà vu induced.

The more things change the more they remain the same.

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