



Annual Report Checklist for Champions

IDENTIFY KEY STAKEHOLDERS/RESOURCES

Who's on the project support team to:

- Provide content
- Approve content
- Be responsible for managing the project (the Champion, that's YOU!)
- Know your audience:
- Who will receive the report?
- Is the recipient list current?

DETERMINE THE OUTLINE

Typically, the aim of the report is to chronicle the financial condition and operations of the previous year and can be used to measure your ability to meet financial commitments, whether you made a profit or loss in the previous year, how you are growing YOY, and/or how your programs, research and services are expanding, and so on. It can also serve to shine a light on your passion for change, your commitment and accomplishments, the tireless work of your most dedicated players, the work that's yet to be done, and how your existing and future supporters can help keep moving that needle. Once you have an overarching theme and an outline of what's to be included, you can move forward with executing the plan.

DETERMINE FORMAT

- Is this report a printed piece?
- Is this report a PDF that will live on the site?
- Is this report online and interactive?
- Will there be a companion video?

ESTABLISH MODE OF DELIVERY

How does the audience want to receive it, and/or how do you want to distribute it?

- Mail
- Website
- Link to it via eNewsletter/eBlast
- Any/All of the above





DETERMINE BUDGET

The cost to develop an annual report is a matter of time and materials. Whether you're posting your report online and/or mailing hard copies, here are some budget items to consider:

- Writers
- Designers
- Developers
- Photographers/Videographers
- Print Production
- Mailing
- Website Updates

REVIEW MISSION AND VISION STATEMENTS

It is very common for mission and vision statements to evolve over time. Consider whether or not any realignment/fine-tuning is necessary for sharing with your supporters.

WRITE REPORTS

Once you and your key stakeholders are clear on the report's theme and outline, inform contributors of their assignments and timelines (draft/proof/final). Depending on your structure, reports commonly include:

- President/Board Chair Remarks or Letter to Shareholders + Headshot
- Management's Discussion and Analysis (MD+A)
- Executive Director's Remarks + Headshot
- Committee Reports + Event/Field Photography and/or Supporting Visuals
- Financial Statements (balance sheet, income statements, cash flow) + Notes + Visual Representations
- Auditor's Report

WRITE FEATURE STORIES

Commonly, these include:

- Key Achievements (e.g. operating + financial highlights, quality improvements, advancements in research, using donations/time to move the needle) + Event/Field Photography + Supporting Visuals
- Goals + Objectives (e.g. growth of services to people in need, quality output, new product launches)
- Organizational Changes + Headshot(s)

PREPARE ACKNOWLEDGEMENTS

- Thanks to donors, staff/members, volunteers + Event/Field Photography + Supporting Visuals
- Donor List

MAKE AUDIENCE NEXT STEPS CLEAR

- Post upcoming fundraising activities
- Post volunteer opportunities
- Include a "how-to" for making donations and/or getting involved