



ANNUAL REPORT CHECKLIST

Use this checklist to plan your next Annual Report.

Before you start:

01 **Involve everyone:**

Staff, board members and volunteers. They don't need to directly contribute to the construction, but they can help you collect information, give valuable advice and edit.

02 **Determine the main goal:**

Don't forget to thank donors and volunteers AND highlight the work you did the year before.

Determining your goal will help you decide what should and should not go in your Annual Report.

03 **Collaborate:**

Determine a place (ideally a shared online folder) where you are going to add all the information needed. This will save you time going back and forth and keep all the collaborators on the same page.

Tip: include this checklist in the folder and ask your team to check off items when they are completed.

Tips

Include **pictures** highlighting your work.

Use graphs for your financial information. This is an opportunity to be transparency about your finances and how donor money is being allocated.

Be consistent. You don't want to send mixed messages to your donors.

- *Is your plan for next year in line with your achievements & challenges for this year?*
- *Do the success stories reflect the strengths of your programs?*

Consider the timing of your Annual Report. Don't wait too long after the end of the year.

Keep it short. Highlight your most important achievements instead of including a long list that won't engage your audience.



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What do you need?

- Letter from your Executive Director or Board President**
- Mission and Vision statements**
- Year in Review**
 - List projects completed and initiated,
 - Goals from your strategic plan that were met,
 - Even some of the challenges you had can be included with careful framing
- Statistics about people served, demographics, output**
- 1-2 success stories highlighting how people have benefited from your work. Don't forget volunteer impact stories too!**
- Organizational Financial Data**
- Donor Thank You List**

If your organization relies on volunteers to you may want to add a volunteer thank you section, as an opportunity to ask for support and count their contributions.
- Board and staff list (pictures optional)**
- Plan for growth in coming year**

Make sure you lay out your goals for the next year, so that recurring donors know what they will be supporting.
- Appeal for support**

Based on your goals outlined earlier make sure to ask for volunteers, in-kind donations, and monetary gifts. Make this a clear call to action so your supporters can know how they can help.