

Elements of a Successful Agency-Wide Annual Report

There are many ways to design an annual report and present the health of your agency. These are some traditional concepts used to tell your story to shareholders, stakeholders, the media and the communities you serve. This should only lay the foundation so you can create something that is unique to your agency.

Executive Director or Board President's Message

Usually the first thing the reader sees inside the report. It sets the tone, establishes a theme or a key message and summarizes the report.

Accomplishments and Highlights (Not Activities)

This is the main purpose of the report. What were the results of your work last year? Why did you spend your time and money the way you did? What differences did it make and the outcomes? Connect the everyday activities of your organization to your mission statement.

Telling the Story

Supporters want to hear powerful stories about the impact of your work that feature real people, so include people pictures, profiles, testimonials, and little anecdotes that let those voices shine through.

Asking others who have been touched by your organization to share their experiences is a proven way to share your accomplishments without sounding like you are bragging. Let them say how great you are.

In addition to photos and graphics, use statistics and numbers to tell your story. On the surface, numbers don't sound all that interesting, but if you feature them in a graphic way, they can become a key element. Sprinkle them throughout the report like you might with testimonial quotations.

Promote Your Agency

The annual report also serves as a marketing tool that helps promote your agency and your mission in the community by projecting a positive image. It provides a reason for potential donors to contribute to your organization because of the impact your services have.

Beyond creating a theme for the content, use a specific visual theme to tie the different areas of the report together so it has a logical flow.

Financial Information

The financial information in your annual report needs to tell the story too. It should clearly and concisely explain where revenue comes from and how it is spent.

Use simple bar graphics, pie charts and other visuals as colorful ways to present complex information to help the reader see the big picture and understand trends. A short narrative description is also essential to explain the meaning behind the numbers.

Include a note that says that your full financials are available upon request or on your website.

Thank-You!

Give your supporters and volunteers the sense that you are embracing them as partners in bringing about all of the year's accomplishments. This page may well be the most popular page in the report. In traditional reports, nonprofits often list all of the names of donors, but in shorter formats, that's just not possible.

A Call to Action

Generally on the back cover so it is easy to find and it lends itself to the reader who is skimming the content, it will be the last thing they see. Tell your readers exactly how they can help you. Include a small box or a full page at the end of the report (or a link or form online) with a call to action or request for help. Let readers know the different ways they can support your organization and contribute to the organizations success.

What to leave out

- Too much background details. Edit the annual report so that it is interesting and readable
- Administrative inner workings
- Personal staff and board news
- Failed efforts, focus on successes
- Future activities; the Executive Director letter can hint at the future but the purpose of the annual report is to focus on the past years accomplishments

Best Practices

- Structure the report so it has a logical flow
- Showing is always better than telling. Design and photography can communicate your message better than just words
- Fact check, fact check, fact check all the information, charts and graphs in the report for accuracy
- Proof this carefully to assure all names are spelled correctly
- Ensure the draft is reviewed and signed off by all key decision-makers before it is printed

Go get creative!