Annual Report Checklist

ANNUAL REPORT

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Annual Report Checklist

New to annual reports, and not sure where to start?

Although creating one might initially seem overwhelming, it doesn't have to be.

This checklist was designed as a guide to help those who are getting started with annual reports for the first time get the development process rolling.

It offers some general questions to consider as well as a few you develop your annual report production plan.

For a more detailed resource, you can read [The Ultimate Guide To Creating Nonprofit Annual Reports](#).

1. Who Needs to Be Involved?

☐ Have you identified a project leader?

☐ Do you have a committee to oversee the process? (e.g., Communications/Marketing committee)

☐ Should board members be involved?

☐ Who (volunteers & staff) will be responsible for providing content?

☐ Who will be responsible to have final approval of content?

☐ Do you have a designer/PR agency or volunteer?

2. What is your objective for this annual report?

☐ Who is your key audience?

☐ After reading your report, what action do you want them to take?

3. What format will you use?

Remember that the format you choose will impact the budget as well as production time required.

☐ Digital or online

☐ Postcard (usually with a link to a more extensive online report & financials)

☐ Video

☐ Printed piece (size: 4-colour; 3-colour; B&W?)

☐ A combination of the above

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4. Have you created a content outline?

Here are some of the things to consider including in your annual report:

☐ President / Board Chair's message

☐ Executive Director's message

☐ Committee reports

☐ Accomplishments (3 key achievements this year – examples of these "stories")

☐ Financial statements

☐ Thanks (e.g., donors/members/volunteers, etc.)

☐ List of donors

5. Have you identified key messages and/or themes?

☐ Is your report theme in line with your yearly theme?

☐ What are the key accomplishments you want to share?

☐ How can you share your gratitude with your supporters throughout your report?

☐ Are the key messages you want to portray clear throughout the report?

☐ Do the financial reports support your story?

☐ What additional stories do you need to source to support these messages?

☐ What voices are being shared in your content?

☐ Are the stories and voices being shared those who are most impacted by this work?

☐ Does the story promote authentic voices rather than stereotypes about your work and the community you serve?

6. Have you developed a budget?

Here are a couple of costs to consider budgeting for:

☐ Content development (if you need external contractors)

☐ Graphic design (same as above)

☐ Printing

☐ Distribution and mailing

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7. Have you created a production schedule?

Here are a few things to consider as you create your schedule/plan:

- ☐ **Target date:** Start by identifying the date you require the annual report (e.g., Annual General Meeting, etc.) – and create a work-back schedule from there.

Here are some of the milestones to consider including on your critical path or work-back schedule (please note these are not necessarily in the order you'll need):

- ☐ Content outline developed
- ☐ Key messages/theme finalized
- ☐ Designer/Writer briefed
- ☐ First rough draft of content gathered (e.g., from Board; Committee Chairs, staff, etc.)
- ☐ Distribution process finalized (e.g., mail house etc.)
- ☐ Financials received
- ☐ Financial commentary/narrative description or visual representation drafted & approved
- ☐ Interviews with community members scheduled
- ☐ Interviews with community members conducted
- ☐ Photographs: gathering or staging of photographs and visuals scheduled
- ☐ First rough draft of content ready for Board/staff review
- ☐ Sign-off on content (ED, Board Chair, etc.)
- ☐ Rough layout of design – proofing and approval or feedback
- ☐ Final design approved
- ☐ Printing / online production
- ☐ Distribution

We hope this checklist helps make your annual report creation easy!

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