

Annual Report Checklist

Have you identified a project leader?

- If there will be a number of people contributing to the annual report, it is a good idea to identify a project manager who can spearhead this and ensure production runs smoothly?

Who needs to be involved?

- 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?

What is your objective for this annual report?

Who is your key audience?

Have you clarified the key audience for your annual report - and do you know their preference for how they want to receive the report?

- Printed /mailed version?
 - Post card notification with URL to online version?
 - Online version only?
 - Email notification of online version?

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.)

Have you identified Key Messages and/or Theme?

Perhaps you already have key messages or you have a yearly theme. If not, it might help to distill down 3-5 key accomplishments to focus on.

Have you developed a budget?

Costs will be dependent on the format you choose (see below) and whether you are using external talent, pro bono services and/or volunteers to write, design and produce the annual report.

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?

Have you created a production schedule/critical path?

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

- Target date: Start by identifying the date you required 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
- 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