

# Creating an Annual Report

## Description:

This tool provides suggestions for the process and content of an Annual Report and a sample Table of Contents.

## How it can be used:

Writing an Annual Report can feel overwhelming and daunting. Nevertheless, Annual Reports are a valuable tool for showcasing your organization's impact over the past year to your community and funders.

Your Annual Report can be very creative or it may simply be an account of your activities and achievements over the past year. However you choose to prepare it, make sure it is well laid out, informative and easy to read.

Follow the steps and guidelines (and maybe some of the creative ideas) to develop an Annual Report that demonstrates the value of your organization.

---

## The Process

1. Create a timeline.
  - a. Be clear on when the Annual Report is due.
  - b. Set out a critical path to help you request and receive the necessary information from programs in a timely manner.
2. Determine the format.
  - a. Is there a particular format you need to follow?
  - b. Can you be creative? (i.e., video, imagery, large postcards, etc.)
3. Draft the outline of your report.
  - a. Begin by noting your key message and achievements.
  - b. What three things are you most proud of from last year?
  - c. What aspects would you emphasize if you only had five minutes to tell a stranger about your centre's work?
  - d. Your Annual Report should flow from the answers to these questions.
4. Consider whether there are any additions that would enhance the report.
  - a. Are there photos that capture some of your good work?
  - b. Any testimonials or quotes that would be appropriate?
5. Develop the report.
  - a. Keep it as short as possible and easy to read.
  - b. Request a message from the Board Chair or Chair of the Health Committee.
  - c. Format the content, ensuring it is as compelling as you can make it!
6. Distribute the report.
  - a. Present to Board or Health Committee.
  - b. Present to Chief and Council.
  - c. Deliver to community members.
  - d. Provide an overview at a community meeting or on community radio.
  - e. Have copies available in your centre and on your website.

## The Content

Your Annual Report should summarize what has already happened. Describe recent accomplishments, not current activities or future plans. Do not treat your Annual Report as a summary of your current work plan. You can talk about the present or the future in the executive message or in a small section near the end of the report.

Consider some creative ways to share your organization's story:

- Infographic: Explain in a visual way how clients move through your services and the process they go through by participating in your programs. The infographic can help explain the enormity of the need and the impact you have in the community.
- Timeline: Create a timeline of clients, with photos and quotes as they describe the impact of your services through time.
- Maps: Create a map that shows the scope of your work. Use it to describe the greatest community need and show the difference your programs have made.
- Video: Within your report, use still clips of videos that can be found in your online report. This is a great opportunity to direct the individual to your site and view the complete video online.
- Social: If your centre has a social media presence, incorporate some of the comments that you have received. Highlight tweets, posts, and other social media content by placing next to event photos, impact pictures, and other images showing the organization's role in the community. This will also inspire those reading to follow you and join those already talking about your work.

One of the trickiest aspects of preparing an Annual Report is striking a balance between providing too much information and not enough information to engage and inform the reader. Offer just enough content so people are better informed and then direct them to where they can learn more (such as the website).

Ensure that one person edits the report so that it is consistent in content and writing style. Create a strong introduction that helps people who are unfamiliar with your organization to quickly understand who you are and what you do.

Your Executive Summary or Board Chair Message should make an emotional connection with the readers by reminding them of the good work you are doing to help make your community a better place. Use this to set the tone or theme for what you are sharing in the rest of the report.

One suggestion for formatting this message is:

- Overall focus of last year
- Accomplishment #1
- Accomplishment #2
- Accomplishment #3
- New emphasis for the current or coming year

The above model will produce a five paragraph message with a total of no more than 500-600 words.

Avoid committee reports in favour of one Board report that tells your organization's story in a compelling manner. Individual committee reports can be referenced in the report and posted to the website if they are considered important disclosures.

## Best Practices

1. Include a strong introduction to help orient the reader to the activities of the organization.
2. Clearly state your organization's mission and relate all activities back to the mission.
3. Give a clear statement of performance objectives and targets and describe how they link to the mission.
4. Share your organization's risks, issues and challenges in the messages throughout the report and describe how they are being addressed and mitigated.
5. Tell how your organization is governed, including a list of Board or Health Committee members.
6. Discuss your organization's financials in a way that is clear, brief, and easily understandable.
7. Ensure that your report is written for your primary audience. Avoid jargon and use terms consistently.
8. Post your annual report on your website.

## Annual Report — Sample Table of Contents

Message from the Board Chair or Chair of the Health Committee

Introduction

Members of the Board or Health Committee

Mission and/or Vision Statement

Performance Objectives

Health Centre Achievements

Health Program Reports

- Goals and objectives for current year (*may include time line*)
- Achievements for current year
- Previous year's goals and achievements
- Funding and expenditure charts

Health Centre Financial Statements