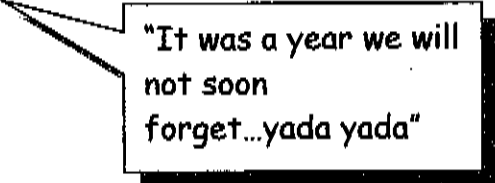


## Annual Reports for Nonprofits

### I. Determine Type of Annual Report Presentation.

#### A. Oral

- State of the Union
- Year in Review



"It was a year we will not soon forget...yada yada"

#### B. Printed/Published

##### 1. Compliance

- a. To meet legal mandates.
- b. To comply with parent or affiliate organization requirements and standards.
- c. To conform with organization bylaws.
- d. To satisfy criteria of grant makers.

##### 2. Correspondence

- a. To sustain contact with stakeholders as part of the ongoing communications program.
- b. To report progress and provide information that satisfies the needs and expectations of existing stakeholders.
- c. To nurture and promote relationships with prospective stakeholders.

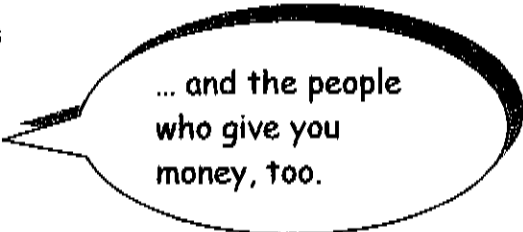
### II. Identify stakeholders.

A. Who already has an interest in reading about our organization?

B. Whose attention do we want to attract?

#### Usual Stakeholders:

- Governing board
- Organization members
- Volunteers
- Funding sources
- Clients



... and the people who give you money, too.

- General public/ media
- Network of peer organizations
- Staff
- Others

### III. Establish objective and theme.

What do we want people to know, think and feel after they have read the annual report – and what action do we want them to take?

### IV. Determine contents.

A. Description or portrayal of the organization's purpose and philosophical approach.

B. Evidence and discussion of activities, progress, and future plans.

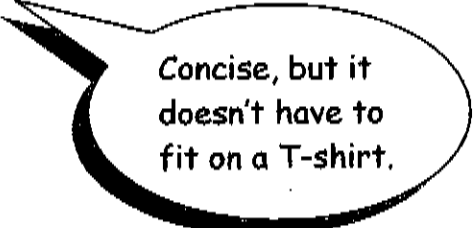
C. Recognition and appreciation of volunteers and contributors.

D. Summary of financial data.

E. List of governing board members.

F. Contact data and staff.

G. Call to action.



Concise, but it doesn't have to fit on a T-shirt.



Thanks y'all.

### V. Develop Form of Presentation. Layout and design.



"Nice, but cheap."

*Note: Your annual report may be your second most important marketing tool.*

#### A. Structure

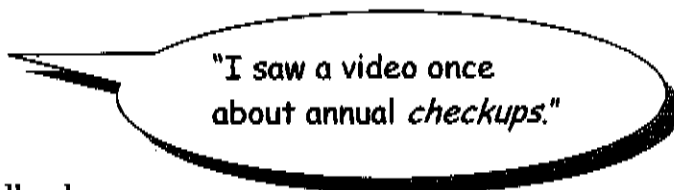
- Size and format.
- Orientation.
- Order of content and pagination.
- Method of distribution.
- Paper selection.
  - color

- weight
- finish

B. Style.

- Design elements.
- Printing - color vs. b&w.
- Typography.
  - Typeface - serif *vs.* sans serif
  - Size
- Graphics.
- Density.

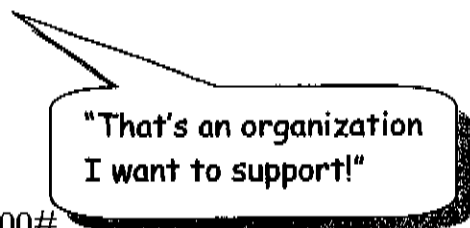
VI. Select printer.



VII. Seek and document feedback.

Guidelines for evaluation:

- A. Docs it truthfully tell the organization's story?
- B. Is the information clear and logical, and is the presentation comfortable and convenient to read?
- C. Is it distinctive?
- D. Is it durable?
- E. Does it emote a favorable reaction?



Examples and approximate costs:

1,000#  
(printing cost only)

1. One-Minute annual report.

- Vest pocket solution \$375

- 2. Two-minute annual report.
  - Solution #10
    - Letter – two fold \$500
    - Legal – three fold \$1,000
    - Special – five fold \$1,200
  
- 3. Pocket folder \$1,800
  
- 4. “Newsletter”- three panel, three fold \$700
  
- 5. Saddle-stitched brochure –16 pages. \$1,750
  
- 6. Comb bound booklet.
  
- 7. Newspaper insert or page.