

Annual Report Checklist



This checklist was designed as a guide to help those who are new to annual reports get the development process rolling. It offers some general questions to consider as you develop your annual report production plan. For a more detailed resource, you can read our guide, “Getting Started with Annual Reports” by visiting wildapricot.com/annual-reports.

Have you identified a project leader?

- If there will be a number of people contributing to the annual report, it’s a good idea to identify a project manager who can manage both the volunteers and production process.

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 for **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? Paper stock? Color or black & white?)
- 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 (Executive Director, Board Chair, etc.)
- Rough layout of design – proofing and approval or feedback
- Final design approved
- Printing / online production
- Distribution

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