

# NONPROFIT ANNUAL REPORT CONTENT CHECKLIST

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## PRODUCTION & LAYOUT

Here are some helpful questions to consider for your annual report layout. These can be discussed with your designer and printer.

- Will the report be **printed** or **digital**?
- If it's printed, what **quantity** do you need?
- How many **pages** do you want the report to be? Keep in mind that folded, saddle-stitched (stapled) printed reports need to have pages in increments of four.
- Do you want the report to be **landscape** or **portrait**?
- Do you want the report to be a **unique size** or **letter-sized**?
- If it's printed, **how much will it cost to mail the report**? Based on your budget, do you need to create a simpler version (eg one pager) that can save on cost?
- Who is your **audience**? Consider any specific accessibility needs for your demographic (font size, colors, etc)
- What are the **key takeaways** you want your audience to know? How does the design support these outcomes?
- Does this need to be **mailed**? If so, prepare a mailing list and be ready to provide it to the printer.

## LETTER FROM THE CEO, EXECUTIVE DIRECTOR OR BOARD MEMBER.

- **Tip:** Use a photo of the actual signature from the person for signing the letter to add a personal touch.
- **Tip:** This is a great place to foreshadow exciting updates for the year ahead. Use this space to also inspire future giving.

## PHOTOS

Photos can make or break a good annual report and it's important to make a plan for obtaining quality imagery.

- **Tip:** Don't save photos for the last minute or expect a designer to curate images based on content unless it's been discussed.
- **Tip:** Build a library of brand photos throughout the year.
- **Tip:** Take photos throughout the year capturing any events, meetings, etc. you'd like to highlight.
- **Tip:** If you need to purchase stock photos, decide if you want to curate the photos yourself or get help from your designer. If you need help finding stock photos from a designer make sure you discuss this with them ahead of time so that there are no surprise costs.

## MISSION STATEMENT, VISION STATEMENT OR PURPOSE, ETC

- **Tip:** Talk to your designer about making sure this is highly visible and easy-to-read. It could take up a full page or have a unique type of graphic treatment. Don't let your mission get lost by tucking it into a paragraph of text!

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NEED SOME HELP? GET IN TOUCH!

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## OVERVIEW OF PROGRAMS OR INITIATIVES

→ **Tip:** It's helpful if this is broken down in a list so each item can be accompanied by a visual – a photo or graphic.

## INCLUDE UNIQUE STORYTELLING CONTENT

- **Year in review:** Work up stats or metrics that can be used in an infographic design or displayed visually. Think about social or website engagement, # of volunteers, \$ raised, people impacted, land or species protected, etc.
- **Success stories:** Share your big wins from the year. Maybe you met a fundraising goal or protected a new species. This is your place to brag!
- **Donor Highlight:** Share words and photos about a donor with a special story or went above or beyond last year. This would be a great opportunity to share an interview with a donor.
- **Partnership Highlight:** If there was an organization or business that helped you meet your goals last year, show your appreciation by talking about it in your annual report.
- **Volunteer Recognition:** This can be a fun way to put some faces to your organization and give a hardworking volunteer or group of volunteers a shout out for their work with your organization.
- **Coverage Map:** This could be an illustrated map highlighting the communities you positively impacted last year or a map indicating future coverage areas you hope to achieve through fundraising or a capital campaign.

## CAPITAL CAMPAIGN PROGRESS REPORT

If your organization is currently working on a capital campaign, share photos, stats, and updates to encourage donors to keep supporting progress.

## LIST OF DONORS

→ **Tip:** Consider how you will break this down. At what giving level are donors listed? Should you separate individuals and organizations? How will you break down endowments, legacy giving, etc?

## FINANCIALS

- **Tip:** Talk to your designer about finding unique ways to visualize the financial data. There are a lot of cool ways to design a pie chart!
- **Tip:** Check out the Better Business Bureau's annual report financial requirements to make sure you're including the key financial information.

## STAFF & BOARD LIST

→ **Tip:** If space allows, consider adding photos of your staff & board. Make sure you have photos that are consistent in quality and style. If it's available to you, coordinate a photoshoot (professional or done in-house with a phone or digital camera) so that backgrounds, coloring, spacing of the headshots are similar.

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