Your Nonprofit Annual Report Checklist

Who will be the team leader for your annual report:

Who else will be involved?

☐ Will you need to create a committee to oversee this process?
☐ Are there board members who should be involved?
☐ Who will be responsible for providing content, including financials (program staff, etc.)?
☐ Who is responsible for approving the content?
☐ Will you be hiring an outside designer or can your annual report be created in-house?

How will your annual report be delivered?

☐ Printed and mailed
☐ Post card
☐ Online version
☐ Email
☐ Other

Have you created an outline?

☐ Message from the CEO/ED/Board Chair
☐ Financial statements
☐ Donor profile
☐ Accomplishments (story/ies)
☐ Gratitude
Have you identified your theme?

Have you developed your budget?

Have you developed your timeline?

This might include:
- Outline of content
- Development of theme
- First draft
- Production process
- Financials received
- How financials will be displayed
- Sign off on content
- Final distribution