



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