

Win hearts and minds, customers and funding,
by communicating clearly and effectively

What to include in your annual report



Who we are

Do you have a summary statement, strapline or description that will instantly convey who you are and/or what you do?

Do you have a vision, mission and values? A set of key messages? If not the questions below will help

What we do

What is your mission or what are the main strands of your work? If they aren't already easy to understand, try to break these down into manageable chunks.

What are their intended outcomes, broadly?

How & why we do it

What is the problem that your organisation solves?

What is your particular solution?

Why are you unique in being able to solve this, what do you do differently?

What are your values and theory of change?

Are there any misconceptions amongst our potential readers that you need to address?

Our impact

This is likely to be distributed throughout the report and may come from a number of sources.

Do you have a theory of change OR

What is the change/are the changes you want to make happen, in what timeframe, how far have you come in this year?

What are the most important statistics that will evidence this?

What anecdotes/quotes – from beneficiaries or those who work with them or commission/fund you - would evidence this?

What stories/case studies would demonstrate this?



How the money is spent

	Can you convey your income and expenditure visually? The usual method is a pie chart, could you do something more creative, perhaps something that ties in with your specific organisation?
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Thanks to our funders, commissioners and partners

	Do you have a full list of everyone who's supported you?
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	Is there any order of priority?
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	Do you need to separate out major funders and commissioner, from partners?
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	Do they have specific requirements about how they're credited and how their logo is used?
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Find out more

	Ideally your annual report is so interesting that people are now curious to find out more, so this is the place where you signpost them to more information (another reason why you don't have to include everything in your report!).
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	Make sure to include your website (make this large, as a 'call to action'), email address, social network names, and if you have one, a link to your enews sign-up form.
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	If you're a registered charity and/or limited company you'll also need to include your registered office, company registration number and registered charity number.
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Is there anything else you've found that you need to do or include that's not listed here? Is anything missing? Do contact us - we'd be interested to hear your tips and experiences.

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