

• HOW TO •

craft an annual report

your audience
will actually read



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{design + writing}

WELCOME!

Organizations do annual reports for a variety of reasons. For many, they're simply seen as an onerous requirement or expectation. However, that doesn't mean your report has to be dull and dry. When creatively executed, annual reports can be a great opportunity to showcase your work and highlight your impact. Annual reports can be a fantastic tool to tell your story, make a case for supporting your organization, thank and acknowledge your contributors and supporters, reach new audiences, as well as build your brand. If you simply treat it as an obligation, I'd argue you're missing a wonderful opportunity to connect and build trust with your audience.

In this document, I've put together some tips for you that will hopefully spark a few ideas to make this year's annual report really sing, or even to take a totally different approach. I also hope it will give you ideas to help make the process as painless as possible.

The guide is organized into five main areas:

- General guidelines
- Writing
- Images & graphics
- Design
- Distribution

I challenge you to not just read these tips but commit to putting them into practice this year. If you do, your organization's annual report is sure to entice your audience to engage and connect in ways it never has before.

Happy reading!



GENERAL

To help get you started, there are a few basics worth mentioning that will get you off to a good start with this year's annual report.

- **Start today (no, yesterday).** Planning is key to creating a report that isn't the standard you've always done. You need some time to collect meaningful stories, images and data.
- **Keep it short!** There's no need to fill page after page. If you can say it or show it in a shorter way, do.
- **An annual report is not a communications strategy.** Your annual report shouldn't be the only way you're communicating with your audience. Rather it should be part of a larger communications strategy that builds trust and confidence over time.
- **Set a deadline and milestones.** Need that report for your board meeting? Work backwards from that date and build in plenty of time for printing (2 weeks), design, reviews, drafts, collecting inputs, etc. Draw up and share a timeline with everyone involved in the process.
- **Create an annual report dream team.** You'll want to make sure you have one or more people tasked with the development of the annual report, with clearly defined responsibilities (see the next point). This could include only staff members, or draw upon external actors (photographer, writer, designer, etc.)
- **Clearly define roles for your team.** More than one well-intentioned annual report process has been derailed by unclear roles and responsibilities. Is the Director writing that letter, or is someone drafting it for her to review? Who is responsible for collecting and deciding on images to use? Specifically, discuss these kinds of issues with your team (as applicable):
 - Who is responsible for drafting the different sections? Reviewing? Editing? Collating inputs from various contributors?
 - Where will you get images? Do you need to collect them from field staff, or do you have an existing photo library?
 - Who will be responsible for designing the document? Printing it? (or overseeing these processes)
 - Where might potential bottlenecks occur, and who is tasked with clearing them when they arise?
 - Who has the ultimate sign-off on the document?
- **Don't shy away from negatives and challenges.** Everyone knows that development work is hard. If you only paint your work with rosy brush strokes, your readers will know you're being disingenuous. It's not easy to talk about the setbacks and disappointments when they occur, but addressing them head on with lessons learned and plans to improve in the future goes a long way towards building trust and confidence.

CONTENT

The words you use in your annual report are central to its success, so don't just throw text together at the last minute! Give the written content some serious thought, and follow these tips to craft an annual report narrative that will have your readers turning pages.

- Know your audience.** Like any other good piece of writing, your target audience should define your tone, style, and even your content. Get specific if you can - of course you have multiple audiences who will likely read your report, but if you can hone in on one audience who you specifically want to speak to you'll be able to more easily craft your message.
- Focusing on the IMPACT and VALUE of your work** will keep your readers engaged throughout. Resist the temptation to include a laundry list of activities and outcomes from the year. Use data wherever you can, and humanize your work with individual stories.
- Organize your report creatively.** Keep your readers in mind when outlining your annual report's content. Is presenting your work along the lines of your internal divisions and departments really useful to your audience? Artificial grant and program distinctions might make sense to you, but they don't necessarily translate into compelling narratives. This could mean a bit more work on your part to structure inputs from your team the way you want them, but it could be the difference between a compelling and ho-hum report.
- Selecting a theme or focus for your report** is one way to help to differentiate your report from previous years and keep readers interested. Finding a new angle and diving deep into one area of your work does require some compromises (not every program area might be mentioned equally in a year, for example) but it can allow you to really demonstrate your impact.
- Keep the text brief!** Make sure not to wax too lyrical - we know you love the work you do, but remember that you have limited time to convey your message to your audience.
- Maintain a balance of text to images and graphics** (favoring the latter). A good rule of thumb is that one page of text in Word equates to approximately two pages laid out - you want to make sure you leave plenty of space in the report to tell your story visually and have breathing room (white space) for readers to be able to digest all of your amazing work.
- Use clear, simple, jargon-free language** throughout. Acronyms should be used sparingly - my rule of thumb is if they're used four times or fewer in a medium-length document like an annual report I try and spell them out.
- Give your writers a clear brief.** If multiple people are contributing to the writing, make sure they know exactly what you need from them. Ideally, you'll have one person tasked with collecting the inputs and weaving them into a cohesive narrative to keep a consistent tone and voice. Use an editor or proofreader if necessary.
- Stories are your mission in action.** Where possible, include first-person narratives highlighting your accomplishments. Get creative if your work doesn't lend itself to the usual beneficiaries - government officials, partners, or others impacted by your work. You can also include stories from your staff and volunteers to highlight specific organizational issues.

IMAGES + GRAPHICS

We know that there is a (potentially large) part of our audience that will focus on the visuals and spend less time on the carefully-crafted narrative. Well-captioned, high-quality, interesting images and graphics can really make your report sing.

- **Be ethical.** Make sure you have permission from people featured in your photographs, and use discretion when working with subject areas that are more sensitive, such as not showing faces when including images illustrating topics like gender-based violence or child welfare. This extends towards being conscious of images you do use in context where they might be misconstrued, such as someone visiting a clinic in a discussion about HIV/AIDS if that person isn't explicitly seeing AIDS-related services. Don't let this stop you, however - there are many creative and ethical ways to use images.
- **ALL work can lend itself to visual imagery.** Get creative! Just because you don't have all the wonderful first person impact images that other organizations do doesn't mean you should skip on photos. In fact, more creative photos might set you apart. Do you work on back-end technology for the health information systems, for example? Take an artsy pic of your staff of coders working late nights, a close up of the server room, or a computer screen showing a line of code. Paired with a great caption, these non-traditional images can be just as powerful.
- **Choose dynamic images that tell your story.** Avoid the standard group-photo-with-certificates shot, or dark workshop photos of the back of peoples' heads. Select images that help to tell your story and show action and change.
- **Use on-brand images.** Do the pictures you've selected advance your narrative? Are they playful? Serious? Hopeful? Does that match the tone of your organization's communications?
- **Use quality images.** If you're printing the report, use only high resolution images that will print clearly. If you don't have any, make use of white space, color blocks and other graphic elements to break up the text (and vow to start collecting them NOW to use next year!)
- **Don't neglect your captions!** There will always be those "readers" who merely skim the visuals, and captions are often the signposts that draw readers in to the text. If you can, write your captions FIRST and then find images (or create graphics) that support them to ensure the visuals are an integral part of the story.
- **Complex idea? Convey it in a graphic.** Lighten up your text by moving some of your more complicated narrative wholly into a graphic with a solid caption. Don't feel as if every graphic needs to mirror part of the text - if it's done well enough, it can stand alone to convey the message and story.
- **Include video.** If you already use video in your work, you can re-purpose some of your video content to help you tell your story. Obviously this doesn't work if you're solely creating a print version, but video can be embedded in an interactive PDF that you display online or added to your online content. You could also include a link to a video housed on your website - if you use a custom URL it could also allow you to track your readership by letting you measure visits coming directly from your annual report.

DESIGN

How you choose to design your report is as integral to its success as the content you include. Think about design early in the process, and let your choices help shape the narrative.

□ **Don't be afraid to deviate from the "norm".**

Your annual report doesn't have to look like everyone else's - or even your own from last year. Big (or small) changes can keep readers interested from one year to the next. Think of your annual report as a great place to experiment and play.

- Change things up - select a different paper size or orientation.
- Go totally digital, using an interactive PDF or even building your own microsite.
- Go "micro", challenging yourself to hone in on your key results to fit on a postcard, and keep the rest for a report housed on your website.
- Ditch the traditional "Chair's Letter" or group photo and replace them with something fresher - perhaps a letter from a beneficiary or a staff member profile.
- Create a "leave behind" - a poster or a calendar - that is packaged as part of the report.
- Create screen savers or printable quotes or images from your report content.

□ **Keep the design on brand.** If you have a style guide, stick to it. Hopefully it is flexible enough to be interpreted differently across different platforms and to allow your designer some room to innovate and change things up, but if you keep your colors, fonts and image styles similar, there will be no mistaking whose report it is. (If you don't have a brand identity or style guide, make it a priority for the next year!)

□ **Make sure you leave plenty of white space in your report.** Listen to your designer, white space is really essential to a positive reading experience! Cut text rather than narrowing margins and spacing if you need extra room - I promise you, this will make your report MUCH more of a pleasure to read, and look much more polished and professional!

□ **Use graphics (and a strong caption) to illustrate complex topics** rather than words. If you have a new program, for example, create a graphic of the program model or illustrate the additional number of beneficiaries you now reach. If you've seen great strides in an area of your work, you can show changes from previous years graphically rather than narratively.

□ **Financials are an especially great place to innovate.** You don't have to do the same income/expenditure pie charts as you always do. Instead, treat the financials the same as the rest of the report - as telling a story. Determine what story it is that you want to focus on with your yearly numbers, and create graphics that highlight that. Remember, your annual report doesn't have to be exhaustive. You can always point interested readers to request a full financial statement from somewhere on your website.

DISTRIBUTION

You've written an amazing report, but don't forget to pay some attention to how you get it out into the world! Done smartly, you'll reach the right people and get them engaged in your work.

- Include your contact details.** Seems obvious, but make sure that you're clear on how interested readers can get in touch, contribute, or learn more about your organization. While this isn't necessarily an appeal, readers hopefully might still be inspired to take action.
- Call your readers to action.** While not necessarily a marketing piece, you can still ask your readers to take action after reading your report. It doesn't have to be an appeal for donations (though it can be), but could include encouraging them to visit your website, to sign up for your newsletter, to volunteer or get involved, to follow you on social media, or even to take a survey.
- Aim to get readers to your website.** If they're not already fully engaged, it's likely your webpage is where you want them to head. There you can collect their emails to add them to your list, which is essential for keeping the conversation going with your audience.
- Track recipient's actions.** Can you really call them readers? Who knows? Traditionally organizations sent out their annual report far and wide, but had no way of knowing if they were ever used as more than a coaster. For those printed reports you do distribute, you can use some creative ways to try and track engagement. You can include a custom URL to a donations page or additional information online that, when used, would indicate that a reader had arrived there through the link in your annual report.
- Use any data you collect** on your readers and their actions to improve next year's annual report.
- Launch your annual report?** If you're using a message or theme that ties in with a campaign or call to action within your organization, you might think about holding a "launch" event (live or virtual) for your report to add a little extra interest or weight to it and garner additional interest.
- Ditch the paper report** (or at least better target its distribution). In addition to saving on printing costs, you can better track at least who is opening your report if you house it online. Whether this means you create an annual report micro-site, or simply have a downloadable PDF housed on your website, you can get a better sense of who is engaging with your content than with traditional paper reports. You could also send the report link via email or a summary via postcard and include a link to "request a printed copy". That means you're able to print out just that number that you need and better target your resources.



CONGRATS!

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you're on your way
to your most engaging
annual report yet

• GET IN TOUCH •

I'd **love** to hear more about what writing and design challenges your organization faces! Please drop me a line at hello@jennifergeib.com and let me know what's on your mind.

If you'd like more tips on how your organization can better communicate through design and writing, check out the articles on jennifergeib.com or sign up for the monthly newsletter to have tips delivered right into your inbox.

And if you'd like to explore working together on your next project, let's chat!
hello@jennifergeib.com

I look forward to hearing from you



jennifergeib.com



getting started

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some general
thoughts + tips