



A year in the life: a Best Practice Guide to annual publications

By Jennifer Campbell and Kay Parris



WELCOME

There are a huge range of charity annual reports/annual reviews/impact reports out there today. From annual reviews on the back of a postcard and glossy printed publications to videos and interactive microsites to doing nothing beyond the statutory minimum, charities are taking a dizzying array of approaches. For communications professionals, it can be difficult to decide which path to take when it comes to reviewing your year.

We first published this guide in 2013 so CharityComms members could see what others were doing and be inspired by it. With the landscape changing and charities producing some great new work, we felt it was time for a second edition, packed full of all-new case studies, tips, testimonials and advice from professionals in the sector you can use when planning your next publication.

In recent years, charities have found themselves increasingly under attack from the media and a concerned public over everything from fundraising practices to senior staff salaries. One thing is clear: transparency and accountability are not optional. Your annual reporting can be the perfect place to set out your stall, and prove you're a credible and trustworthy organisation.

Whether you're a seasoned annual reports pro, looking to flick through some examples for inspiration to get your creative mind whirring (see our list with links on page 36), or a newbie looking for step-by-step guidance, this guide has all the information, opinions and advice you need.

Enjoy the guide.

Adeela Warley, CEO, CharityComms and
Jennifer Campbell, co-author



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ANNUAL REPORTS, ANNUAL REVIEWS, IMPACT REPORTS: WHAT'S THE DIFFERENCE?

Every charity has to produce a **trustees' annual report and accounts**, whether in print or online. It's a document of accountability that, at its simplest, shows the Charity Commission and your funders how the organisation is raising and allocating its income.

The Charity Commission must be satisfied that funds are being generated and spent appropriately in the service of your charity's objectives, structures, activities and achievements.

Some annual reports go much further than required, showcasing a charity's work during the year through great pictures, stories and more. Alternatively, charities may choose to publish these more colourful elements in a separate **annual review** that relates the highlights and challenges of the year.

While an annual review generally includes a snapshot of financial comings and goings, it is free of the legal obligations governing the annual report. This means it can focus on being attractive and accessible to a broader range of readers.

Any decent annual report or review will demonstrate the **impact** a charity's work is having on its intended beneficiaries. As such, impact reporting may sit prominently within the annual report or review – alongside financial reports and news of other valuable, but possibly less impact-evident, developments.

However, many charities opt to produce a dedicated **impact report** that focuses more or less exclusively on providing evidence of the impact they have had on different aspects of their mission.

Others prefer to treat the challenge of impact reporting less as a once-a-year activity and more like a process – conveyed not only through annual publications, but, for example, by a tailor-made and ever-changing web page, by ongoing stories put out through all kinds of media from news releases to tweets, or even through an app.

In other words, there are various reporting options. But giving the statutory annual report and accounts a miss this year clearly isn't one of them.

And as far as any communications professional is concerned, neither is hiding the evidence of your impact and achievements from everyone but the regulator – especially in these times, where charities find themselves under attack from the media and public trust is wavering.

So let's get to work.

CASE STUDIES: WHICH TYPE OF REPORT?

Annual report: one document for everyone

Suzanne Westbury, senior editor, The National Autistic Society

We just produce one annual report, which we print and put online as a PDF. It meets all statutory requirements in the back end, but with a more marketing-focused front end featuring information about our achievements over the year.

We have a broad audience for the annual report, including our 20,000 members, our donors, people who fundraise for us, commissioners and trustees.

It's laid out in such a way that allows people to dip into it if they want. We also produce a short, eight-page version for this kind of audience. But for people who want more detail, it's all there in the one document – they don't have to go elsewhere for the information.

Last year at The National Autistic Society we...



Thanks to our staff, volunteers, funders, fundraisers, donors and campaigners. Find out more about how to take part in our work at www.autism.org.uk/getinvolved.

The National Autistic Society – Annual report 2016

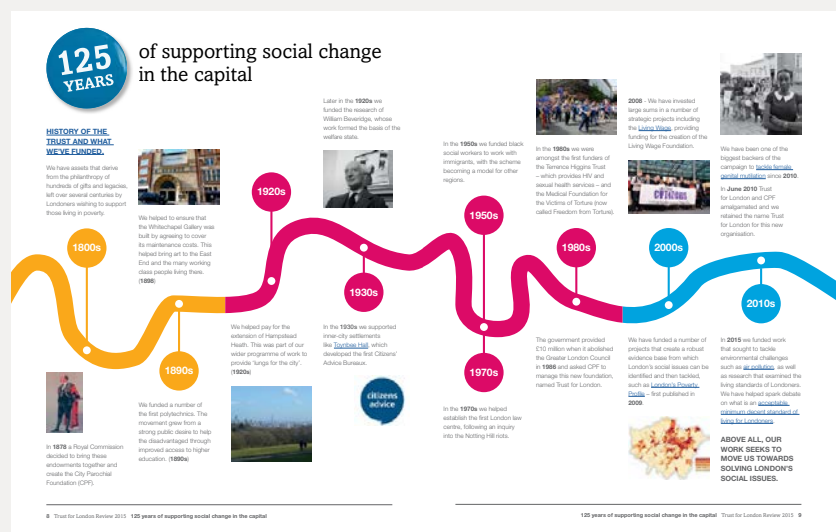
Review: short and visually-led

Navprit Rai, communications manager, Trust for London

We produce our 'Review 2016', which is a shorter and easier-to-read document, alongside our full accounts. We think dropping the 'annual' from the title makes it sound more accessible and less official for readers. People get bored with long, text-packed documents, which is why we separate the two.

It's also why we keep it short – 16 pages last year – with lots of graphics and images. We think about how long someone is actually going to spend reading it, and try to clearly demonstrate our impact in a digestible way.

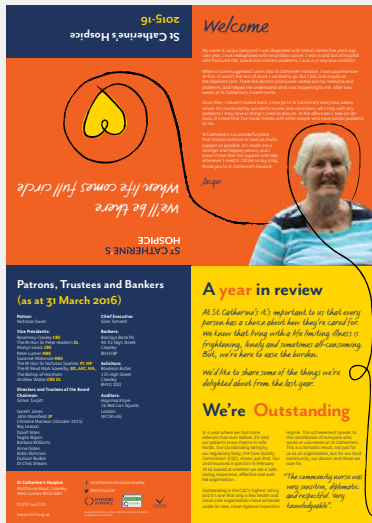
Trust for London – Annual review 2015



Q CASE STUDIES: WHICH TYPE OF REPORT?

Fold-out poster: clearly targeted audiences

Alison Crouch, marketing and communications manager, St Catherine's Hospice



We produce a statutory annual report, and then an annual review we can use for marketing too. We rebranded last year, and the annual review was the first document we published after the rebrand, so we wanted to make a bang with it.

We'd previously had an A5 portrait booklet. It had lots of text, was hard to read, and wasn't working for us. So we decided to pare it right back, and produce a fold-out poster.

One side we aimed at patients, families and anyone else who might want to find out more

about what we do. The other side targeted commissioners, GPs and anyone else who might refer patients to us.

Now we're giving people what they want to know from us, not what we want to tell people – and we've had lots of positive feedback.

St Catherine's Hospice – Annual review and accounts 2015-16

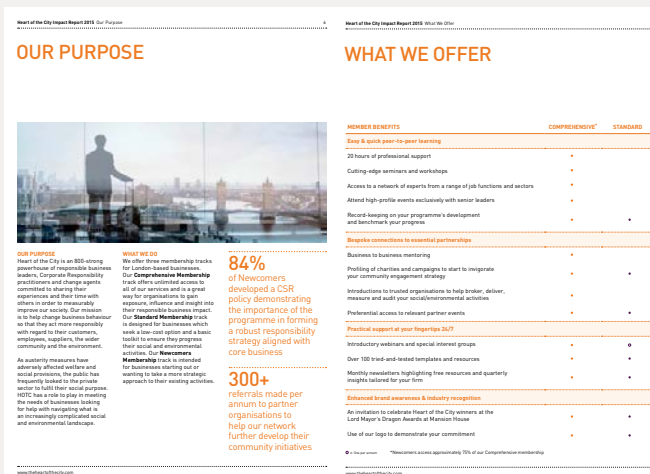
Impact report: focus on outcomes

Vicky Mirfin, director and CEO, Heart of the City

I think people are interested in impact – not just what we do helping businesses in London jump start their responsible business programmes, but the outcomes of our work.

Our impact report reflects this. The main section is made up of qualitative information on our impact, including case studies and quotes, alongside good, robust, quantitative data showing the difference we make.

Heart of the City – Impact report 2015





If you're in England or Wales, the minimum your charity can get away with is an annual trustees' report and accounts for the Charity Commission within 10 months of the end of each accounting year.

The size of your charity governs how downright abrupt you can choose to be when writing your narrative report. Those with incomes under £500,000 can prepare a simple summary of structures, activities, performance, how the charity has benefited the public and finances, while more is demanded of the bigger-earners.

You can find the requirements set out on the [Charity Commission's website](#).

Good practice

The Charity Commission interprets the legal reporting criteria for charities through its statement of recommended practice (SORP).

SORP has undergone a review and several changes in recent years. In brief:

- For 10 years until 2015, charities had to follow the rules of SORP 2005.
- For financial years starting on or after 1 January 2015, a new system was introduced.
 - Charities that met at least two of the three following criteria could use the Financial Reporting Standard for Smaller Entities (FRSSE) SORP: income didn't exceed £6.5 million; total assets didn't exceed £3.26 million; and employed no more than 50 staff.
 - All other charities had to use the Financial Reporting Standard (FRS 102) SORP.
- However, the FRSSE was withdrawn. For reporting on financial years starting on or after 1 January 2016, all charities must use the Charities SORP (FRS 102) together with Update Bulletin 1.
- Another consultation took place in 2016 on the SORP, with another new version expected in 2019. A new version will now be published every three years.

Find out [all about the SORP](#), and more information about which SORP your charity needs to use online.

What's the difference between SORP 2005 and the new versions?

Some key differences communicators might want to take into account include:

- Larger charities (those with incomes over £500,000) now have to disclose their arrangements for setting pay for their senior leadership team, including any benchmarks, parameters or criteria they use.
- Larger charities have to describe the main risks they face, and their strategy for managing these.
- Larger charities must explain the financial effect of significant events, in an effort to more closely link their actions to money raised.
- All charities have to state how much money they have in reserves, why they're holding that money, and their policy on reserves.

Find out more on the [Charity SORP website](#).

The Charities Act 2016

As part of the Charities Act 2016, new rules around giving information on fundraising practices in annual reports came into force on 1 November 2016.

Charities with a gross income of more than £1 million or total assets of more than £3.26 million must now include information in their annual reports about:

- their approach to fundraising.
- their work with, and oversight of, any commercial participators/professional fundraisers.
- whether their fundraising conforms to recognised standards.
- monitoring of fundraising carried out on their behalf.
- fundraising complaints.
- protection of the public, including vulnerable people, from unreasonably intrusive or persistent fundraising approaches, and undue pressure to donate.

Find out more about the rules on the [Fundraising Regulator website](#).

In Scotland or Northern Ireland?

- Scottish charities must complete an annual return for the Office of the Scottish Charity Regulator (OSCR). [Find out more](#).
- For Northern Irish charities, it's the Charity Commission for Northern Ireland that handles annual returns. [Read more about the requirements](#).

Basic requirements: compliance survey

A survey of 100 of the UK's biggest charities, published by Deloitte in September 2015 (its sixth such survey)¹ suggests it is not unheard-of for charities to ignore elements of the guidance set out by SORP, or to comply with it only by the skin of their teeth.

According to the survey, only 34% of charities gave information on key performance indicators or reported clearly against targets or goals in their annual reports. Deloitte commented: "It is not always clear whether the intervention or activity was successful or whether it was more or less successful than anticipated or hoped."

Some other interesting facts from the survey are:

- Just 33% of charities produce a separate annual review/impact report over and above their annual report, down from 38% in 2014.
- Just 33% of annual reports surveyed were judged to be 'visually interesting', down from 44% in 2013.

WHO IS YOUR REPORT FOR, AND WHY?



Charities tell us the annual report is in effect their brochure – the way they tell stakeholders what they are doing, and present themselves to potential new supporters and donors.

Stephen Cook, contributing editor, *Third Sector*



DO YOU ACTUALLY NEED AN ANNUAL REVIEW?

Charities don't have to publish an annual review, only the formal annual report. Would your effort, time and budget be better spent creating a few more targeted and specific marketing materials than one big, all-singing, all-dancing annual review? Annual reviews often try to do and be everything and can sometimes end up doing and being nothing. Don't just publish an annual review because that's what charities do.

Gideon Burrows, *ngo.media*



Every serious communicator knows the two first rules for any piece of work:

- 1 Know your audience
- 2 Know your purpose

But let's be honest – the annual report/review is the annual report/review, right? We know who it's for: the stakeholders. And its purpose? Twofold, obviously – accountability and marketing.

Some of us have written annual publications with little more than these criteria in mind. Yet, with a more exacting response, we can better figure out what kind of report, review or mix of both is best for our needs – indeed whether our needs are even best served by an annual publication outside of the statutory basics – and how to approach the content and format of the product we are creating.

Your audience

Who are these stakeholders our charities go on about?

They might be donors, other funders, volunteers, beneficiaries, trustees, members, affiliates, staff, visitors or people with the potential to be any of these things.

They may be partner organisations, local or national government bodies or collaborating NGOs.

The problem with annual publications is that, with the money spent on them and the time invested, we generally need them to engage a wide audience.

But does it have to be that way? Could you narrow the audience for your annual review/report? Could you produce tailored versions for different audiences? These are questions worth asking. The more targeted your audience, the more effective any publication is likely to be. Charities like Anthony Nolan successfully target a narrow audience with their annual reports (see case study below).

If not, we can often identify which of our audiences are the most crucial. We can group some together as key prospective readers of a review, or an impact report, or a series of impact stories. Having got that far, we can begin to shape the language and look of the report to best resonate with its key stakeholder groups (see more content tips on page 30).

CASE STUDIES: AUDIENCE

A broad audience

Janet Miles, head of communications and campaigns, Livability

Because the audience is always a challenge to pin down, annual reviews can be the bane of a comms team's life. You have to produce one, but who exactly is it for?

Often, annual reviews are pitched towards trustees and launched at AGMs. Given the amount of production work they take up, we wanted to make sure there were broader access points for supporters, trusts, grant-making bodies and corporate partners.

We did this with online targeted email communications and sharing stories through our blog to encourage engagement. We also did a direct mailing to legacy supporters and took the annual review to key events on our communications calendar.

We now use it as a bit of a brochure for the charity. It's a key resource for many teams.

Livability – Annual review 2015-16

LIVABILITY ANNUAL REVIEW 2015-16

SHARE YOUR STORY

LIVABILITY'S STORY

Livability is a Christian disability and community engagement charity. We are an enabling network, tackling barriers in society and working for inclusion. As a proven and trusted provider of disability services, community projects, education and training resources, we help to connect people with their community. Other charities have recently joined Livability – Holton Lee in 2014 and Prospects in 2016 – giving our work a wider reach.

The Rt Revd Justin Welby, Archbishop of Canterbury
President
As President of Livability, I am particularly pleased to see how the passion, commitment and determination of Lord Shatthbury remains at the heart of Livability's story as we work with many on the margins of society.

HHM The Princess Royal
Patron
I am proud to see how Livability has worked during 2015-2016 to bring people together and make community life more inclusive for the people they support.

What inspires our story?
Inspired by the Christian story
Livability has a dynamic and inclusive Christian ethos, welcoming people from all faiths and none to work together towards the good of the whole community. Our charity President is the Most Revd and Rt Hon Justin Welby, Archbishop of Canterbury. We work with a wide range of local churches.

Why our work is needed
The challenge: tackling barriers
For many people in our society, being able to take part and feel included in their community is difficult. From benefit cuts, unemployment, lack of educational opportunities, poor health or prejudice, there are all sorts of barriers to a flourishing life. Livability is a charity that is committed to tackling such barriers which so often impact disabled and vulnerable people the hardest.

A changing landscape of care
The landscape of the UK's healthcare and social care sectors is changing fast. With public sector funding increasingly stretched, traditional 'top-down' delivery of formal care services isn't enough to respond to needs in our society in the long term. With the passing of the Care Act, there is a far greater emphasis on personal care. People have more choice to design their own support, building on both their needs and strengths, within their own community of relationships and local services. It's a change that needs a collaborative and community approach.

Continuing a rich story of social impact
Created by a merger of the Shatthbury Society and John Gorman, we have an 180-year track record in ground-breaking community work. Our rich heritage of social reform drives us, we are ambitious to innovate and determined to end social isolation.

The response: working for inclusion
Livability works to connect people with their community. By drawing people and resources together, we believe people are stronger. Through community involvement, partnerships, innovation and enterprise, we can build on what's good and deliver more joined-up opportunities for the people we support.

Community and strengths-based care
Livability brings a unique and dynamic offering to the care arena. We have strong expertise in disability care and community engagement. With a wide network of staff, volunteers and church partners in the UK, we have at our disposal a huge pool of talent and strength that can do much to support and empower people to enjoy a more livable community. Our charity is working to create more connection between our disability services, church partnerships and community work, so that we can deliver joined-up responses to local care needs.

Our services include:

- 38 residential care homes
- 17 registered community services for disabled people in their own homes.
- 2 education centres for disabled students.
- A wellbeing centre in the Dorset countryside.
- A Lifestyle Choices programme promoting daytime opportunities and independent living.
- A brain injury rehabilitation centre
- An enterprise agency supporting people into employment.
- Church training in community engagement and disability awareness.
- A wide range of social inclusion work through churches and community projects.
- Spinal injury rehabilitation expertise provided to developing countries.

Narrowing the audience

Horacio Herrera-Richmond, creative studio manager, Anthony Nolan

For the past two years, we've narrowed our audience and focus for the annual report, to appeal to major gift donors and trusts.

With this audience in mind, we produce just one document, which has both an extended, marketing-focused narrative in the front and full accounts in the back.

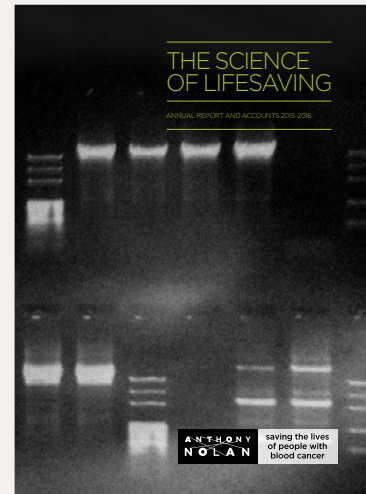
Before, we had been doing a separate annual review and report, with the annual review being more creative and aimed at many different audiences. But we dropped it, because

we couldn't identify clearly enough who needed it in the organisation. It wasn't detailed enough for some teams, but then wasn't targeted enough for others.

We've been happy with this approach – the right teams are using the annual report actively, and we've had good feedback.

I would say don't do an annual review just for the sake of doing it – make sure it's a useful tool and clearly serves your aims.

[Anthony Nolan – Annual reviews and reports](#)



Communicating with volunteers

Nick Edmans, director of communications, Cats Protection

The audience for our annual review is quite broad, including major donors, individuals who have donated to us, and our members. It works to keep these relationships warm, and remind people who we are, what we do and what our priorities are.

Volunteers are also an important audience for the annual review. Many of our volunteers are very passionate about cats, and it's an important internal communications tool we use to reassure them about where the charity is going and how we are dealing with issues, as well as giving them an insight into the thinking that informs our strategy and plans.



Cats Protection – Annual report & accounts 2015

Your purpose

So you've identified your audience. But what do you want them to actually do and feel after they've read your publication?

Your aims might include:

1 Accountability. Your stakeholders need to understand clearly what has (and has not) happened to progress the mission in which they are engaged, in their different ways.

You, on the other hand, need your stakeholders – be they beneficiaries, donors, members or volunteers – to have confidence in continuing (or beginning) their involvement with your charity.

Your communications must meet both these needs, and many charities get their annual reviews or impact reports to shoulder a large chunk of the job. Without stakeholder confidence, things fall apart. So you need to focus very clearly on who the stakeholders reading this publication are, and ask yourself how your report, review or impact story is going to contribute to their understanding and engagement with your work.

2 Marketing/fundraising. Beyond accountability, your report or review can be used as a key marketing tool in every approach to contacts old and new. It will almost certainly accompany (or be referenced online with) every fundraising initiative or activity.

3 Thanks. This publication may give you a chance to thank many of your stakeholders – your fundraisers, staff, volunteers, members and supporters, who should feel genuinely appreciated.

4 Inspiring action. What's the point in producing an expensive publication like an annual review without clear calls to action? Think about how you want your readers to respond to your publication. By joining or donating to your organisation? Stepping forward as a volunteer? Feeling motivated to continue supporting/donating/volunteering/raising funds? Consider how you can maximise the return on the investment you're making into your annual publication.

5 Learning. The process of gathering, analysing and presenting data in order to do the things above (and possibly more), could just help your organisation in the process of learning lessons and developing new strategies.

Many charities find all these objectives are substantially met by their annual publication, usually as part of a rich communications mix. Others rely on different methods.

Imperative?

It is important to recognise that the case for not producing any kind of report or review, beyond the statutory minimum, may be compelling for some organisations or in certain circumstances.

For example, some who are funded entirely by organisational or individual membership fees may have less of a fundraising imperative to set against the resources needed to produce a review. Some will achieve all the marketing they need through multiple, smaller, targeted media.

Many organisations will be asking themselves challenging questions about whether a review will be a worthwhile investment given their particular priorities and resource realities.

The goal of all charity communications should be to have a positive influence on a defined audience's knowledge, attitudes and/or behaviours to help you achieve your charitable mission. An annual review is no different. It needs a clearly defined purpose to justify spending resources on production and distribution and for you to understand whether it is an effective communication.

Natasha Roe, director, Red Pencil



🔍 CASE STUDY: PURPOSE

Biggest direct mail of the year

Dan Reynolds, marketing and development manager, Bethany Christian Trust

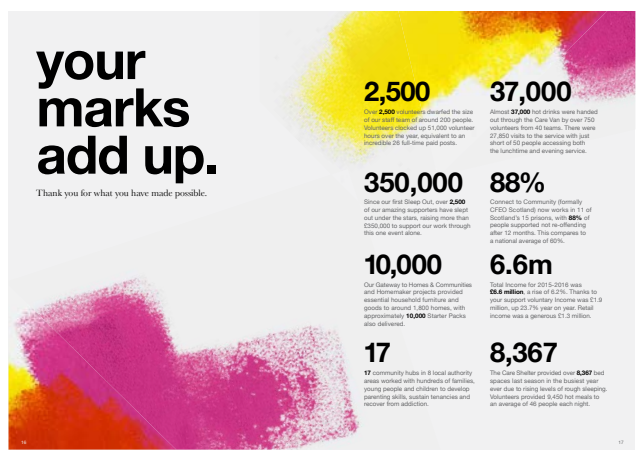
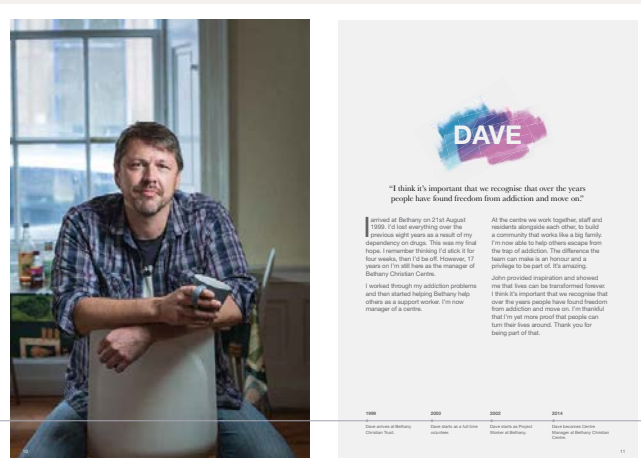
Our annual report is our largest direct mailing piece of the year, and second biggest generator of direct mail income, after our winter appeal.

It goes out with tailored covering letters to around 8,500 people, and has a lot pinned on it! If people have opted in for 'once a year' contact, the annual report is what they get.

We also have an online version, designed on a platform called Readymag. It has been very effective for us as you can have a floating 'donate' button at the top of the page at all times.

We don't just use the annual report's theme – which is 'Make your mark' – or content just for that one publication either. We've used the theme for a major donor event recently, and in our next magazine we'll do follow ups on three of the people featured as case studies in the annual report. Our marketing and fundraising is completely integrated, and the annual report shows this.

Bethany Christian Trust – Annual report 2016





More and more charities are abandoning full print-runs of paper-led annual publications in favour of cheaper, more versatile online options which can prompt instant donations, membership and so on from web readers.

There are a huge range of online possibilities for your annual reporting. PDF reports generally have printed counterparts – often in small print-runs or on demand. It is rare these days for a charity to produce a print-only report, but many still find value in print copies for specific uses.

THE BENEFITS OF DIGITAL

Annual reports are rarely read cover to cover and people increasingly demand their information in bite-sized chunks. A digital version which can be accessed from your website, flagged up on social media and linked to in pitches and presentations is a more interactive experience. Readers can take control of where and how they consume your document. A digital approach also offers excellent solutions for people who are visually impaired or have a learning difficulty.

In most cases, digital versions will allow you to measure exactly how people are interacting with your content so you can further refine marketing and communications to make them more personal.

Chris Michaeloudis, director of development, nim design²



KEEP PRINT IN THE MIX

Digital reports allow room for creative content – photos, video clips, interviews with beneficiaries and links. It can be chopped up and used for snappy social content to drip feed key messages and impact stories.

The big question is, should a hard copy be produced too? It can be a considerable additional expense, in both resource and time. For me personally, having access to a paper copy is incredibly helpful – particularly when pitching to, and reporting to, funders, sponsors and corporate members.

Sometimes it's just easier all round for someone to flick through a paper version and to know you don't have to rely on your target taking the time to look up an online report.

A supporting paper report is nice to have, and arguably a must-have, but comes second to the digital version.

Caroline Diehl MBE, founder, Media Trust and Community Channel



Microsite to PDF and print

Lindsay Baldwin, head of communications, British Heart Foundation (BHF)

Two years ago, we invested in a microsite for our annual review, so we could test if there was a need or a benefit to having a big digital presence for it.

However, when we evaluated the project, we concluded the numbers of people visiting the site weren't large enough to warrant the spend – or the investment of time from the BHF team.

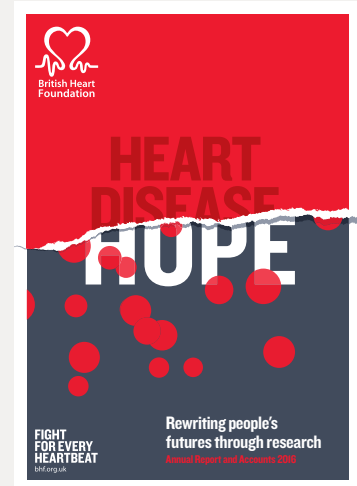
In 2016, we looked again at what we needed to deliver for the key audience – which is a fairly niche and small one, but a very important one including corporate partners

and trustees – and how we could best do it with the resources we have.

We decided a downloadable PDF on a webpage with key stats from the annual review would be the best use of resources, and the best way to communicate with our audience. We also do a print run.

It was a clear decision for us – there's no point investing money in a microsite when there's no need to do it.

[British Heart Foundation – Annual report and accounts 2016](#)



Printed desk calendar

Antonio Cappelletti, director of marketing and communications, The Brain Tumour Charity

The most effective communication involves dialogue, not monologue. That's why we wanted an annual review that people could interact with: something that would stimulate our stakeholders and invite them to think actively about what we do.

We talked first about how people usually respond to an annual review. After a quick informal survey, we concluded that many do no more than flick through it and then park it on a shelf (at best).

We wanted to do more. We looked at our core audiences and asked, what do they need? We thought they would like something on their desks, something they could actually use in their everyday activities.

Our answer was to format our annual review as a desk pad with a page for each week of the year. It's practical and packed with examples of our activities and impact in 2015/16. It includes statistics about brain tumours, puzzles, doodles and spaces to write. It also features reminders about how to get involved with the charity, for example by sharing one of our social media posts or signing up for an event.

We were looking for interaction, and the very positive reaction of our community suggests that's what we achieved.

The Brain Tumour Charity won annual report of the year in the Third Sector Awards 2016.



[The Brain Tumour Charity – Annual report 2015/2016](#)

Microsite and print

Kirsty Marais, media and communications manager, Alzheimer's Research UK

I think there's definitely still a place for print. Our annual review is aimed at a wide audience, including our supporters. Lots of young people do support us, but of course dementia largely affects older people, and sometimes they prefer print.

That said, alongside our printed publication, we have been developing a digital presence for our annual review over the past few years. We know the majority of people are online, don't want to be carrying around heavy documents, and like the interactive element online can provide.

This year we have a powerful but concise microsite for our annual review that is closely replicated with design and content in the print version.

Alzheimer's Research UK – Annual review 2016



Video animation and print

Matthew Wright, website planning and content manager, International Institute for Environment and Development

The print version of our annual report is still very much in demand among our donors, funders and partners, who are our key audiences. But for the past three years, we've been experimenting with creating a digital version, alongside the printed version.

Last year we put the majority of the content from the printed version up on our website, and added some interactive elements like videos. It took a lot of work, and didn't have as much impact as we had hoped. So this year we decided to make

an easily accessible four-minute video animation to go alongside the printed version, and nothing more.

We structured it so the content is very sharable on social media. Because we only make it clear it's an annual report during the final 12 seconds, we can repurpose and reuse the content beyond the end of the year too, as more of an advert for the way we work in partnership.

IIED – video highlights



Microsite and print

Janet Miles, head of communications and campaigns, Livability

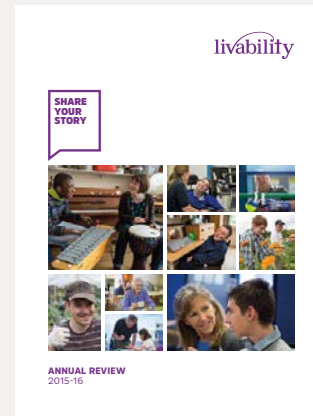
Instead of simply posting up a downloadable PDF, we want people to properly engage with the content and to connect them with our newsletter and other ongoing communications work.

That's why we produced a microsite with dynamic videos and graphics alongside the printed

annual review. We worked with a couple of different agencies to produce the site and the films.

We've been pleased with the number of visits, and it's great we've been able to use the online template for two years in a row.

Livability – Annual review 2015-16



A website section, print and summary document

Carol Eden, head of communications and marketing, and Heather Crumley, marketing officer, Quarriers

Although we still do a small print run of our annual review, we've focused on creating an online annual review for the past five years plus.

We create the digital annual review entirely in-house, and it sits within our main website. What we do as a charity can be quite complex. We find video can convey this better online than words in a printed

document and people are more willing to watch a video than read about a service.

We're not keen on microsites, and prefer the annual review to sit within our main site. We want to build our brand, and having lots of different microsites can dilute the message. We also benefit from having all the functionality of the main site.

We produce a one-page summary PDF too, which is useful to send out to some audiences, such as staff. We've got 2,000 staff, so couldn't afford to send them all a printed copy of the full review, but the summary works well.

Quarriers – Annual review 2016



Reporting impact in real-time

Of course, there are many other ways to communicate your charity's impact aside from a once-a-year static annual review or report. Charities like Oxfam (see case study on page 19) are finding all sorts of new and innovative ways to communicate their impact online and in real-time.

ANNUAL REPORTS: OBSOLETE?

In an age of always-connected electronic devices and short attention spans, the annual report seems obsolete beyond its function as a regulatory requirement. It enforces a mindset of creating content to a deadline, once a year.

Charities need to communicate with supporters regularly, offering up-to-the minute updates, stories and opportunities to interact with people who see supporting particular causes as core to their identity, values and lifestyle.

Digital annual reports have always made use of multimedia elements to tell stories. Bitesize facts, infographics, short video and audio clips draw the eye and highlight key points, deepen relationships with supporters, reward their support with 'bonus material' and keep communicating the impact charities (and their supporters and donors) have on the world. But they're often created specifically for annual reports and never re-used.

The most effective charities also set key performance indicators and show progress against them. A charity's impact data is more persuasive when it's up-to-the-minute, connected to a regularly updated data source and showing the world how they respond to crises in real-time.

A familiar concept to fundraisers and campaigners, 'totalisers' display progress against fundraising targets or signatures on a petition. But there are fewer totalisers showing the overall impact of a charity in real-time – a heartbeat for a charity's performance.

These tools are not as expensive or complicated as one might expect. Charities can take advantage of free and inexpensive tools to tell great stories and present impact data that captivates casual browsers and converts them into supporters.

Google Analytics is free and can help you convert website interactions into impact data: the number of people helped reading advice articles, self-referrals to services, appointments booked, money raised through individual donations, petitions signed etc. With some technical knowledge, this data can be displayed on a charity's website using Google's programming language.

Tableau is available for a small fee through the Technology Trust and can collect data from various sources into charts and graphs on a dashboard, while Google for Nonprofits allows charities to fundraise directly on YouTube, where they share their stories.

Stories and live data can make for compelling reports that live all year round.

Ed Cox, co-founder, Reason Digital



My Oxfam app

Paul Vanags, head of public fundraising, Oxfam

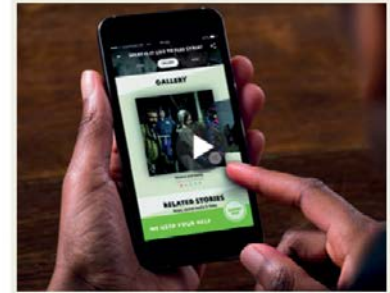
We launched our My Oxfam app in early 2017, providing supporters with the chance to see live updates on the charity's impact, as well as to control their donations.

Charities are striving to meet the public's demand for a closer, more modern and responsive relationship with the charities they support. Oxfam's personalised app is another step towards that.

My Oxfam provides a window into the lives changed by our supporters' generosity and allows users to control their giving from the palm of their hand. The app gives them complete control of their support anytime anywhere and allows them to experience the impact of their generosity.

My Oxfam: Oxfam's new app

Oxfam's new app puts you back in charge. Control your monthly donation in seconds. See the real impact of your donations. And be the first to know when disaster strikes.



Video: Introducing the My Oxfam App

Oxfam's new app puts you back in charge.

[Oxfam – My Oxfam app](#)



GETTING STARTED

Strategy and staff

The process of putting your annual publication together will hinge on several factors: budget; the genre concerned; the format you have chosen; staff or freelance resources; and, perhaps most important, the level of strategic importance your charity places on impact reporting (in all its forms).

Communications teams can be influential in ensuring systems are in place so that every part of the organisation keeps tabs on, and provides evidence for, the value, impact and development of what it is doing throughout the year.

Clearly this is about stories – stories of the people who benefit from or contribute to your work, and stories about challenges and learning. It is also about verifiable facts and figures.

Organisation-wide data-gathering systems make the communicators' job much easier in gathering material for reports, reviews and ongoing stories. They also mean that the information required to back up grant applications, fundraising drives and answers to various enquiries are accessible – and help ensure staff have the confidence to act as ambassadors for the organisation.

Part of the strategic approach involves understanding how much staff time can be allocated to output/impact reporting in your organisation. If your communications team is tiny and appears to be shouldering the entire reporting burden, you may not be able to justify spending endless months on research, so forward planning may become more important than ever.

At Cancer Research UK, annual reporting is afforded a great deal of staff time. However, organisations with a smaller staff resource may still benefit from reflecting on the charity's thorough approach.

Leaving nothing to chance

Alison Glossop, publications project manager, Cancer Research UK

We have our annual review in mind for most of the year, alongside our other publications. We publish in July, and then the process for the next year starts in August.

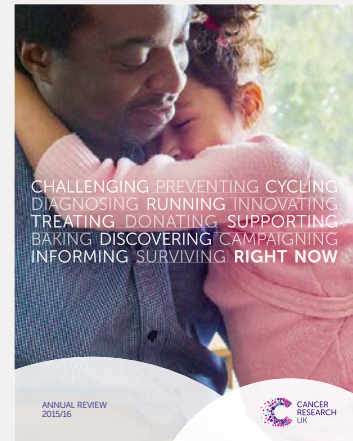
Our first task is to run a number of wash-up meetings with everyone involved in the publication, from our fundraising and finance teams to our copywriters and design agency, as well as people affected by cancer, where we discuss what went well and what we might want to change for the following year.

We start deciding our theme and honing creative concepts in October, before getting in

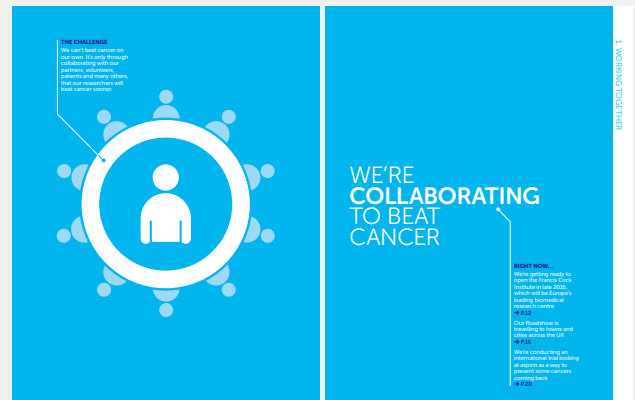
touch with our case studies and kicking off the writing and design in January.

Patient involvement is really important to us. This year, we've introduced two stages in the schedule where patients can feed back on the annual review during the process, so their opinions can influence the final content, rather than just asking them what they think at the end.

Planning, and a schedule everyone involved has signed off, is absolutely key, and helps make sure everyone is happy with the final product.



Cancer Research UK – Annual review 2015/16



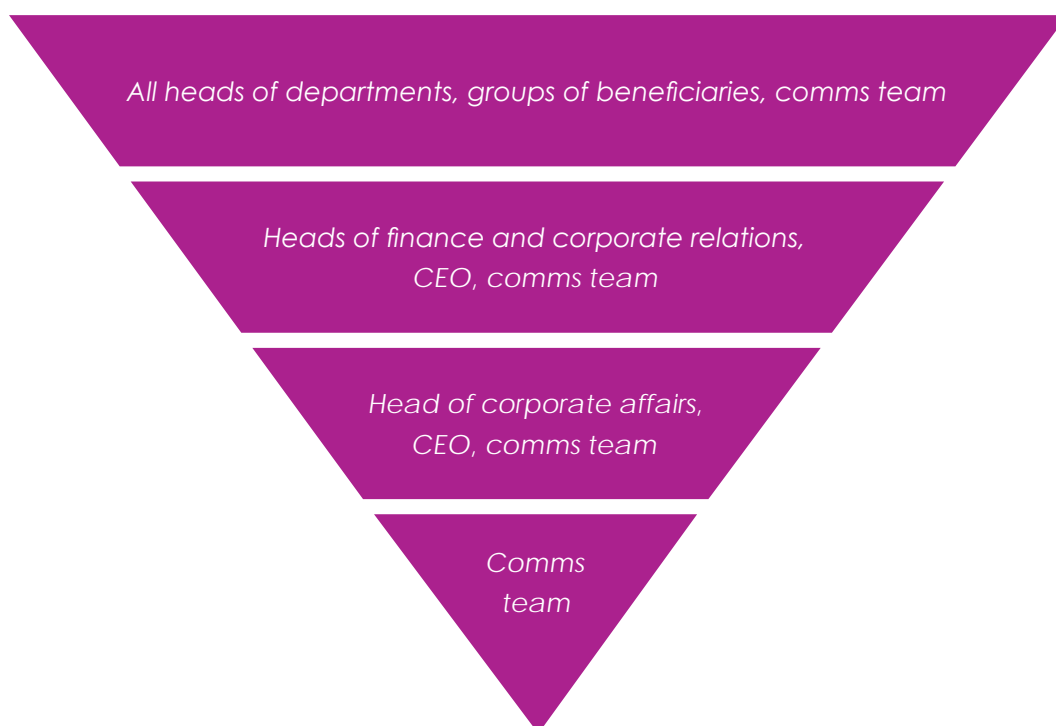
Production

It's obvious, but sometimes we overlook obvious things: write a schedule. A surprising number of organisations don't. Seriously: determine your desired date for distribution and work backwards from there – print day to first concepts/ research and all the stages in between. You will have less, not more time than you anticipated. And without a schedule, your chances of getting your report out at a strategically opportune, convenient, or even respectable time will be slim.

Information comes from different parts of the organisation. But writing and editing the report is a job for the comms team – or at least, for the comms team to commission and manage.

While other departments can and must contribute their stories, it is crucial for comms staff to keep a proper reign on write-ups if a tight, consistent and timely editorial is to be achieved. While 'copy approval' protocols are a fact of life in many charities, most department heads accept that communicators must be allowed to manage the approval process according to strict schedules and criteria.

A good way to think of sign off is the inverted pyramid. Everyone and anyone who needs to have their say does so at the beginning of the process. Then the number of people seeing and commenting on your annual review narrows as the process goes on – with ideally just one or two people in the comms team giving final sign off for publication.



Don't let it be designed by committee. Everyone wants a piece, but they can't have one. I maintain quite strict editorial control over it. But if everyone got too much say it could diffuse the focus of what we're trying to achieve.

Dan Reynolds, marketing and development manager,
Bethany Christian Trust



Outsourcing

Where copy or design is outsourced to an external agency or individual, it is essential to be clear about who on the inside is project manager for the report, so that proper communication channels can be established between the agency/freelance and the organisation. It's also essential to write a clear brief which includes elements such as your design style, tone of voice, brand guidelines etc.

Q CASE STUDY: OUTSOURCING

Working with a creative agency

Judith Escribano, head of communications, Age International

We've worked with a creative agency on our last couple of annual reviews. When choosing which agency to go for, I would advise looking at their past work, but not just in the charity or NGO sector, as that's not necessarily where innovation is happening.

Then it's a fine balance between standing your ground on things that are non-negotiable, and you know best about, and being flexible and open to ideas. For example, our agency was keen to move away from using pie charts to represent our financial information, but we know that's what some of our

audience expects. So we asked for our income and expenditure to continue to be represented in a pie chart.

Listen to the agency, respect them and their experience, but don't let their ideas veer too far away from what you want! Or what you know about your brand. We liked our agency's approach of 'we'll fight for what we want twice, then if we still can't convince you, we'll go with the client's approach'.

Age International – Report of trustees and annual accounts 2015/16



Our priorities

- E** Emergencies: We will respond to emergencies
- H** Health: We will improve health
- P** Poverty: We will reduce poverty
- R** Rights: We will protect and promote rights

Where we're working

We work in over 100 low and middle income countries in Africa, Asia, the Middle East, Latin America and the Caribbean.

How we raised our money

Age International receives grants and donations from UK individuals, trusts, statutory bodies, Age UK, the UK Government and businesses.

How we spent our money

The majority of our income is spent on development projects, emergency relief, recovery work and disaster risk reduction.

Our achievements in 2015/16

We'd like to share the words of some of the people with whom we work, so they can tell you about some of our achievements.

Kashif, 71, Nepal
We've changed the attitude of [health] staff towards older people. We've motivated older people to stand up for their rights. And they demand their rights!

Lauraeva, 56, healthcare volunteer, Mozambique
Your willing dedication to [Wagya] has guaranteed her a daily meal, home-based care, hygiene products and clothing. You are Wagya's lifeline and I forgive my almost instant disappointment for your support.

Ena, Senior Communications Officer, Ethiopia
[Bethul, the health worker] is like a son to me – I'm finding it surprising my skills. I love them. If I were not blind, I don't know what would happen. When Bethul comes, I feel happy.

Domingo, 76, Mozambique
[Bethul, the health worker] is like a son to me – I'm finding it surprising my skills. I love them. If I were not blind, I don't know what would happen. When Bethul comes, I feel happy.

Emmett, 68, Tanzania
I feel safe and more confident since doing the rights training. I know what measures to take against [dangers of tuberculosis]. I know how to feel confident in a dignified manner.

Photo credits

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© Age International, Age International

Page 7: From top to bottom
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Dear Nya #1, Myanmar
I want to be strong like this duck. I'm so happy to get this duck. I want to be strong for all the people in the UK, that they be able to strong like the duck.

Karimjha, 76, Zanzibar
Life would be very difficult if I had not had my contacts removed. I wouldn't be able to farm and that is very important for us. I would not be able to do a single thing.

Evaluation

Evaluation can look like a tedious and eminently forgettable step in the production cycle – but go on, do it anyway. You can keep it simple and still reap real insights and benefits to help you with your next report/review. It can be as basic as a brief meeting with a few members of staff (who, after all, are some of your consumers) plus a group email to a representative sample of your target audience. In these days of rapidly-changing communication preferences and available formats, it is more important than ever to keep abreast of what your readers want and don't want from you.

CASE STUDY: EVALUATION

Getting feedback from across the organisation

Elizabeth Bourne, communications manager, Saferworld

Six months after our annual review is published, we will send out a short survey across the organisation asking for feedback. It's short,

to encourage people to fill it in, just asking how many copies people have given out and what feedback they've received.

But it's useful for us when planning for next year.

An evaluation needs to include both quantitative and qualitative data. All too often, charity evaluations stop at measuring numbers, such as copies distributed, people reached, responses received, etc – ever easier with free analytics tools providing sophisticated data. However, to get meaningful insights about whether your annual review is effective at influencing people, you need to ask questions and capture people's descriptive responses. Use staff meetings, emails, surveys, interviews, feedback forms and social media shout outs to test whether your annual reviews have the desired effects on the knowledge, attitudes and behaviours of your target audience.

Finally, combine quantitative and qualitative data results and analysis to understand whether your annual review is a strategically sound investment.

Natasha Roe, director, Red Pencil



LET'S BE HONEST



It should be obvious by now that refusing to answer questions, declining to engage and trying to fudge answers aren't going to make questions or scepticism go away. Indeed, it will only make them grow louder. The only way to answer critics is, well, by answering them. You cannot hope to persuade everyone, but let no one accuse you of not being honest and open.

This genie is not going back in the bottle, nor should it. But we must be careful – whereas charities could previously have often been seen at the forefront of openness, we are in danger of being outpaced by the public sector and by publicly listed companies. We cannot afford to be seen as less transparent and accountable.

Sir Stuart Etherington, chief executive, National Council for Voluntary Organisations³



In our reviews of annual reports in the magazine, transparency is a mixture of things: clarity, making the key facts and figures highly visible, and producing an honest assessment of what is going on at the charity. It can be quite a subtle thing – some reports leave you with an impression that the full story is not being told.

Stephen Cook, contributing editor, Third Sector



Public trust and confidence in charities is wavering, fuelled by attacks from the media.

A mid-2016 survey⁴ from the Charity Commission showed that public trust in charities had dropped to the lowest recorded level since monitoring began in 2005, and had fallen from 6.7 out of 10 in 2014 to 5.7 in 2016.

The report found that the fall in trust and confidence was down to critical media coverage of charity practices, distrust about how charities spend donations, and a lack of knowledge among the public about where their donations go.

While more recent research from nfpSynergy⁵ showed public trust on the increase, this remains a critical problem for the sector. And it makes it more important than ever for charities to be transparent and robust in their reporting.

Many charities demonstrate their commitment to transparency in their communications. Charity reports often convey progress on their objectives by indicating the extent to which these objectives have been achieved.

For example, Breast Cancer Now takes [reporting against its strategic aims seriously](#), highlighting the organisation's achievements against each of them during the year.

Norwood also [reports back](#) against its strategic aims.

Of course, transparency is not only about admitting fault or failure. It is about reporting facts, without spin or partial disclosure. If it isn't clear to people how much you are spending on admin, they will suspect you are spending more than you should be. If you would rather not explain your fundraising activities, lest supporters think you are lavishing money on gimmicky events or products – or are more interested in making money than spending it on the cause – they will be more inclined to resent the fundraising slice shown on your pie chart. In reality, your supporters need to know you are taking seriously the vital business of generating more income for your charity.

Of the reports we reviewed, some of the most powerful were those that were closely linked to the aims and objectives of the charity and the strategy being used to achieve them.

Reza Motazed*i*, national head of charities and not for profit, and
Nikki Loan, senior manager – charities and not for profit, Deloitte⁶

”

The public wants to see charities explain more and account better for how they manage and spend their money. They want to see honest and ethical fundraising, and they want to know that charities are making a positive difference to their causes. We can also see that when people know more about a charity their trust and confidence in charities generally increases.

Sarah Atkinson, director of policy and communications, Charity Commission⁷

”

Public trust in charities is fragile. The public are bitterly disappointed when wrongdoing is exposed given the very high standards they expect charities to adhere to. Communications professionals have a key role to play in strengthening perceptions of trust, impact and transparency.

An important first step is to take stock of how transparent your organisation is internally. Does your organisation have silos which prevent best practice from being shared? Are practices that fall short of the highest moral standards being challenged?

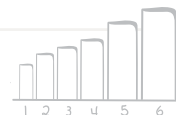
Tim Harrison, research director, nfpSynergy

”

Transparency is absolutely crucial. We think charities do themselves a favour by describing the impact they have made. Their supporters want to know that the donations they have made are getting through to the cause and having a real impact. We want to see an annual report that tells that story. Accounts are an important part of it but you need the story as well as the financial detail.

David Robb, chief executive, Office of the Scottish Charity Regulator (OSCR)⁸

”



This isn't a section about impact reports: it's about impact reporting, which every charity's annual publications need to do, as do all manner of other internal and external communications.

Charities tend to consider their impacts in terms of the difference specific projects make to the lives of the individuals, groups and communities they exist to help; and also in terms of what progress they have made towards realising the 'big picture' of their mission – something that can be harder to quantify.

DEFINING IMPACT

- the overall difference you make to those you're trying to help
- the long term, big picture, general change you make

From Principles of Good Impact Reporting, New Philanthropy Capital⁹

Annual publications aside, most comms teams convey impact periodically through many different means – web stories, press releases, fundraising materials, social media and more – all year round.

Indeed, some would say annual publications (beyond a brief, statutory annual report) are unnecessary, so long as other communication channels are in use.

Analysing impact

The tools and methods of impact measurement and reporting can be viewed as something of a science. There are resources available to help your charity learn more about approaches that can be taken. For example, the [Inspiring Impact](#) coalition of NGOs has lots of information on its website.

Communicating impact

There are six general principles that define how organisations should communicate their impact:

- 1 Clarity
- 2 Accessibility
- 3 Transparency
- 4 Accountability
- 5 Verifiability
- 6 Proportionality

What should they communicate about impact?

- 1 Clear purpose
- 2 Defined aims
- 3 Coherent activities
- 4 Demonstrated results
- 5 Evidence
- 6 Lessons learned

Edited extract from Principles of Good Impact Reporting, NPC¹⁰ – in the original each principle and point is fully explained.

CASE STUDY: IMPACT REPORTING

Publishing robust information

Matt Stevenson-Dodd, chief executive, Street League¹¹

Charities have a growing transparency problem. Scarcity of funding is driving us to tell ever more hard-hitting stories about the beneficiaries we serve, without balancing them with information about whether or not we achieve an impact.

Many charities think they are measuring their impact by reporting that they have helped huge numbers of people. But what does this actually mean? Are they just saying a couple of kind words to somebody, or are they truly making a change in their life? Too often, the culture of telling a good story has taken over from accurate, impactful reporting.

We need to change. We need to balance our stories with the facts,

even if they don't always tell a good story.

All charities should agree to three rules for reporting. At Street League, we have three golden rules:

- 1 Never over-claim
- 2 All percentages must also include absolute numbers
- 3 All outcomes must be auditable

This year we are presenting all our information in our annual report. We have devoted the first section to talking about everything we didn't get right, before going on to talk about what we did get right. It has not been easy and we still have a way to go, but we want to learn from our mistakes and change things so we can better serve our beneficiaries.



Street League – Annual report



The editorial structure of your annual publication will vary according to its key audiences and type (whether simple statutory annual report, fuller annual report with review, annual review or impact report). It will also depend greatly on your key chosen medium – printed report/PDF (with online/interactive version), integrated web pages, YouTube film or whatever.

The [Charity Commission website](#) is the place to go to remind yourself of requirements for the statutory annual report narrative, which must accompany your accounts. It also offers links to [sample charity reports](#) that meet the content criteria.

Basic structure

For those tackling an annual publication for the first time, or those in need of a prompt to get them started, here is a generic contents skeleton. The model you actually adopt will be influenced by various factors, as mentioned above. Nonetheless, a scan through various guidelines, and numerous samples of all types of report, suggests your skeleton will include some or all of the following bones, inter-connecting in the order and manner that suits your product:

Annual publications generic contents

- Trustees' message
- Details of your charity and its mission
- Structure/governance
- Goals and objectives for the year
- Risks and challenges
- How the goals were met/failed to be met
- Detail of activities
- Detail of impact:
 - a) How did your activities meet the goals of your charity?
 - b) How specifically did they create change for your beneficiaries (include case studies and quotes)?
 - c) Figures: How many beneficiaries felt the impact? How can you measure that impact in objective terms?
- Other notable achievements, performance
- Report on involvement of volunteers (testimonials a good idea)
- Goals for next year/longer term
- Finance report
- Vote of thanks (supporters, donors, volunteers)
- Call to action – how to donate, join, support, volunteer

Content tips

Here are some pointers for sharpening your editorial approach:

1 **Be selective.** You may well have a vast amount of pertinent material to hand, but use too much and you will overwhelm, or bore, your readers. Pick out stories that illustrate key themes and tell them concisely.

2 **Use real people where possible:** their pictures, with their stories, in their own words, or brought to life by choice quotes. [Albion in the Community's annual review](#) does this well.

3 **Beautiful pictures, especially of human faces, animals and natural wonders (depending on your areas of work) have impact.** Check out the [Royal Air Forces Association's annual review](#) and also [WWF-UK's annual review](#).

4 **Good graphics can convey complex information simply and memorably.** Most reports make decent use of these in their finance pages – but there will be other pages where they can help. [Alzheimer's Society's annual review](#) opens with a great graphic.

5 Intersperse your pages with **pull-outs and boxes** for key nuggets of material – quotes, statistics, goals and achievements.

These nuggets are what people will remember from your report. At the same time, they provide access to more detailed information by varying the pace, and keep people pushing through the report.

6 **White space is your friend.** Both endless flowing prose and clutter (riots of colours, stories and pictures squeezed into every square centimetre) are turn-offs.

7 **Careful with your chair's report and your donor lists.** They are pretty much obligatory for the annual report and may be politically so in an annual review. But be brave. If you have to have it, find ways to keep the chair's introduction brief and punchy. Also consider having an intro from a beneficiary, as [St Catherine's Hospice](#) did.

8 **Ensure language and visual presentation are relevant and appealing to your key supporter groups (see also Your audience, page 9).** We'd say [the briefest glance at this highly engaging treatment from Dogs Trust](#) tells you a fair bit about its key audiences, their interests and affinities.

9 **Be transparent.** There may be an element of celebration in your report, but be honest about the things that haven't gone so well and the things you are less keen to publicise (like your fundraising expenditure?). It's a sure-fire way to earn credibility – and what is accountability without transparency?

10 **Focus on impact** – in most commentators' books, this is the golden word.

Be bold

Getting the fundamentals of your annual review/report right is important. But could you go that step further and make your publication amazing? There are some seriously impressive annual publications out there that are big, bold and hugely creative. We've already seen some annual reviews with strong themes and bold creative in this guide, and two more are featured as case studies on the next page.

A menu of dogs

Deana Selby, publications manager, Dogs Trust

This year we themed our annual report around a menu, with, among other sections, appetisers and main courses showing our achievements, sides talking about microchipping (chips!), and a children's menu on our work with young people.

We come up with the concepts, and write the copy in-house. Our key audience is Dogs Trust

members – dog lovers. I always start by asking myself what they'd want to see from our annual report. What's nice to read as a dog lover? For me, it's humour and great pictures. So that's what we include.

Annual reports are inevitable, like death and taxes. So why not make the most of them?



Dogs Trust – Annual accounts 2015

Good storytelling

Philly Byrde, PR officer, RNLI



Our last annual report had the theme and title 'Our courageous community'. It ran through all our copy, including section headers, and visuals for the publication.

Storytelling may have become a bit of a trendy concept, but that's because it's important. Telling a



good story in your annual report, with everything building towards a strong theme – that's what makes a strong annual report.

Coming up with a strong, creative theme isn't easy, and we feel it's a shame to put it in a box after just a year. That's why we've

With courage we save life in the toughest conditions

RNLI rescue teams saved 442 people's lives last year. Our frontline service of lifeboat crews, lifeguards and flood rescue teams remains at the heart of our charity. And as long as people need our help on the water, this will never change.

Courage isn't just about being braving waves, powerful currents or heading north. It's also about the crew members who spend the growing day for our members of our lifeguard teams. It's the 1200 lifeguards who help people in the toughest conditions. And it's the countless difficult conversations, hands held and reassurances given to families and their loved ones. The bravery, skill and commitment of our lifeguards see the fun and games of the people they go to help.

LIFEBOAT CREWS
Lifeguard volunteers dropped everything to head out on sea on 8,200 times, rescuing 2,017 people in 2015. Many will have called their lives in unimaginably tough conditions – almost 40% of those rescues were out in the dark and on 97 about our crews went to sea in gale force 8 winds or stronger.
Tross and Corran lifeguard crews battled for 415 hours to bring a 25-tonne motor to sea in a 140-knot force 11 wind.

home to Troon Harbour in January 2015. After a brief break for the crew, the crew crew headed back out into rough seas for the 3-hour journey home. We have a lot of respect for the boats themselves, and a lot of trust in them and their capabilities. We feel comfortable and safe in that environment, and we're grateful to our crew members and their families who, along with Troon Coastguard, RNLI and the RNLI, have helped us to get the boat back to Troon Harbour. We're grateful to the crew members who have helped us to get the boat back to Troon Harbour. We're grateful to the crew members who have helped us to get the boat back to Troon Harbour.

Harbour crews can face different, but equally difficult, conditions. That of our lifeguard stations, Troon and Corran, seen here on the River Thames in central London. For many reasons and like most they have to make life-critical decisions quickly and support vulnerable casualties, all while working around or against hazards and frequent marine traffic. In 2015 these crews made 681 launches, more than 9% of the RNLI total. Shots may last only seconds or minutes, but that split response is vital in reaching people before it's too late.

442 Lives saved

4 new stations have a 25-hour lifeguard lifeguard

10 additional lifeguard posts

been keeping our annual report themes for two years at a time – although taking a fresh angle in the second year.

RNLI – Annual report and accounts 2015

Ask yourself – what do annual reports look like? What are people expecting? What will other charities or organisations in my sector do? Then do something else. You won't just be more likely to win an award, you'll be more likely to be kept, remembered, pored over. Noticed. And we all want that. Loads of annual reports are nicely designed, well-written, and do everything an annual report is expected to do. How is yours going to stand out?

Reuben Turner, creative director, GOOD Agency¹²

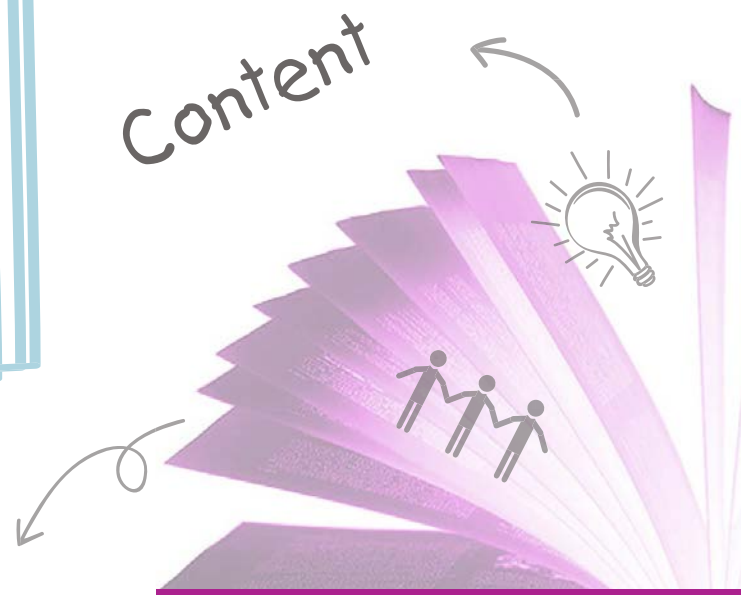
There's so much work involved in the annual report, and we put together such good content and case studies as part of it. So we always make sure we can extract that content and re-use it in other channels too – on social media for example, or using the photo shoots commissioned for the annual report in other communications.

Horacio Herrera-Richmond, creative studio manager, Anthony Nolan

Annual reports should be clear and easy to read. Because it's a legal requirement, I think it's easy for charities to fall into the trap of having a staid, corporate document. You shouldn't see it as a separate thing to approach in a different way to other comms. You can deliver an impactful and interesting product.

What makes a good annual report is how you present it. Don't have pages and pages of copy – break it up with photos, infographics and stats. Remember, you're trying to get people to read it!

Lindsay Baldwin, head of communications, British Heart Foundation



Of course facts are important but you can convey them creatively in your annual review. People are used to quite a lot of visuals in today's communications. We find that a balance of about 60% visuals and 40% facts and copy makes the most impact.

Antonio Cappelletti, director of marketing and communications, The Brain Tumour Charity

We know people don't have the time to read through long, text-packed documents. So this year, we stripped back our printed annual review to just 16 pages, including the cover, and tried to make it as visually-led as possible. We wanted to make it as easy as possible to absorb. We did the same when we replicated it online. At every stage when we edited we'd look to see if there was any more we could cut from the copy. It's always harder to make something shorter, but it's a worthwhile challenge.

Kirsty Marais, media and communications manager, Alzheimer's Research UK

Annual reviews are boring and turgid without stories. In the best annual reviews, beneficiaries' stories take precedence, and charities should be incidental, the mechanism that makes things happen. Put the spotlight on the people we help instead of waffling on about the work we do!

Janet Miles, head of communications and campaigns, Livability

Be respectful in how you articulate your case studies' stories. They're not just a story to tell, they're real people. Make sure they know what's happening before they do it. Talk to colleagues who know them the best and ask if there are any questions to avoid. Give them approval, make sure they're happy with it. Understand that sometimes you can say something conversationally, and then it looks different on paper – give them the chance to change things. If a case study wants to pull out, accept that. It may be inconvenient, but that's your role as a responsible communicator.

Carol Eden, head of communications and marketing, and **Heather Crumley**, marketing officer, Quarriers

There's a danger of annual reviews being inward-looking. In an annual review, it isn't vital to tell people everything you've done. My area of expertise is communications and I'd love to tell people what my team and I have been doing over the year. But you've got to ask yourself: would our supporters be interested? If not, leave it out.

Judith Escribano, head of communications, Age International

Instead of the standard chief executive welcome, which I think can be a bit corporate, one of our patients wrote it. We really felt a patient opening the document gave it some heart. She was able to say in her own words what we do and how we help better than we ever could.

Alison Crouch, marketing and communications manager, St Catherine's Hospice

Our work focuses on building the capacity of local people affected by conflict in around 20 countries worldwide to improve their safety and security, and on research, analysis and long-term policy change. Powerful statistics that grab readers' attention can at times be difficult to come by as our work focuses on longer-term change. We have got round that by painting a picture with stats of the conflicts people are facing, and therefore how vital our work is as well as examples of our programme impact.

Elizabeth Bourne, communications manager, Saferworld

Does it have to be annual? Could you do 365 daily reports? Maybe not as a substitute for the report, but as something extra? Or, could you structure an annual report to work across a day in the life of the organisation? One second in the life? A split-second report?

Nick Asbury, writer, Asbury and Asbury¹³

Whether it's the number of training sessions you ran for health professionals or a summary of your press cuttings, including figures on their own is a missed opportunity. Instead, concentrate on the consequences of those facts and how they relate to your overall organisational goals. So, for example, how 80% of the health professionals who came to your training days used what they learned to improve a young person's mental health. Or, how a mum in the Midlands read an article in her regional paper and called your helpline and got support.

Trina Wallace, freelance copywriter¹⁴



A few perspectives on how and why annual reports might get picked up by the world outside your charity.

ENCOURAGING STAFF TO SHARE

We asked staff to share the link to our online annual review – a four-minute video animation – with five key contacts each. We organised a ‘premiere’ for the video to get people enthusiastic about it and get their buy-in so they’d be keen to promote it. We got all staff to add it to their email signatures too.

Matthew Wright, website planning and content manager, International Institute for Environment and Development



LOCAL MEDIA COVERAGE

We’re based in Cambridge, and have had some success getting our annual review reported on in the local and regional media. We’ve been growing really fast as a charity over the past few years, so that’s been the hook. It’s a good success story to tell, and all it took was a press release to get it picked up.

Kirsty Marais, media and communications manager, Alzheimer’s Research UK



THE MEDIA AGENDA

To get coverage, charities need to send the report to the right media – local, specialist, even national in some cases. Local radio is always neglected. It is a good idea to draw journalists’ attention to the notable things in the report: the trouble is, of course, the media will be more interested in the sort of thing charities themselves might want to avoid emphasising, such as a fall in income or staffing. We don’t count on charities sending us their reports or alerting us to them – we check independently when the reports of the big charities are coming out and scan them for news and feature ideas.

Stephen Cook, contributing editor, Third Sector



MAKE THE MOST OF YOUR REPORT

How do charities manage to create interest in their reports? And how can they ensure media interest translates into the real action and change they're looking for?

- 1 **Get your timing right:** Find the most compelling and timely subject in your report – something that can create a media hook or make the most of an existing one. This could be crucial to getting coverage.
- 2 **Get real voices out there:** Most reports have an introduction from a CEO, chairperson or trustee but you will get twice as much value out of that person if you also place them as a media spokesperson. This gives your campaign a human perspective that the public can more easily engage with. Most organisations now also put the beneficiary at the heart of their report – what was the impact on the people you represent? A real voice from a representative from a beneficiary group can add real weight. And the holy grail? Get a well-known independent voice to advocate your message.
- 3 **Say something memorable:** If you want people to pick up key elements from your report, give them soundbites, and use them consistently through your media messaging so they get repeated by others.
- 4 **Have a call to action:** Ensure your call to action is not hidden on the back page. It needs to be clearly highlighted and repeated in all your communications. Make it easy for people to take that action.
- 5 **Connect back to your campaign:** Ensure that any mention of the report, where possible, refers to your wider campaign or objective and point people directly to the places where they can read the full version and register to support the organisation.
- 6 **Use your own channels effectively:** Social media is obviously a cheap and simple way to get your message out there, but make sure you're using it in a way that will reach the audiences you really need to. If the general public is your target, the usual rules about images, facts and interesting content with a clear call to action apply. If you're targeting a more specialist group, consider contacting them direct or investing in targeted advertising. And if you want this to be the top content for a period, always pin it on top of social. And don't forget, work your advocates, such as corporate supporters and campaign ambassadors, hard – give them clear messages to share to make it easy for them.

Gillian Daines, head of creative, Forster Communications



SAMPLE REPORTS AND REVIEWS



Links to sample reports and reviews

The following list comprises links to reports and reviews that have been featured in this publication, have recently been honoured in awards, or have kindly been suggested by CharityComms members. If you have a great example of an annual publication produced by your organisation, do let us know at sushi@charitycomms.org.uk

Age International	Livability
Albion in the Community	National Autistic Society
Anthony Nolan	Norwood
Alzheimer's Research UK	Quarriers
Alzheimer's Society	Recovery Focus
Bethany Christian Trust	Retrack
The Brain Tumour Charity	RNLI
Breast Cancer Now	Royal Air Forces Association
British Heart Foundation	Saferworld
Cancer Research UK	Scouts Scotland
Cats Protection	The Soldiers' Charity
Changeworks	St Catherine's Hospice
Dogs Trust	Street League
Girlguiding Scotland	Teach First
Heart of the City	Trust for London
International Institute for Environment and Development	Worldwide Cancer Research
Keech Hospice Care	WWF-UK
	YoungMinds

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- ¹¹ Matt Stevenson-Dodd, chief executive, Street League. Reproduced with permission from The Guardian: theguardian.com/voluntary-sector-network/2016/nov/07/charities-transparency-impact
- ¹² Reuben Turner, creative director, Good Agency. Reproduced with permission from Good Agency blog: goodagency.co.uk/good-thinking/win-award-annual-review
- ¹³ Nick Asbury, Asbury and Asbury. Reproduced with permission from Creative Review: creativereview.co.uk/write-award-winning-annual-report
- ¹⁴ Trina Wallace, freelance copywriter. The original article is at: charitycomms.org.uk/articles/what-not-to-include-in-your-annual-review

ACKNOWLEDGEMENTS



Thank you to those who generously gave their time to be interviewed and contributed to the second edition of this guide:

Lindsay Baldwin, head of communications, British Heart Foundation (BHF)

Elizabeth Bourne, communications manager, Saferworld

Philly Byrde, PR officer, RNLI

Antonio Cappelletti, director of marketing and communications,
The Brain Tumour Charity

Ed Cox, co-founder, Reason Digital

Alison Crouch, marketing and communications manager, St Catherine's Hospice

Heather Crumley, marketing officer, Quarriers

Gillian Daines, head of creative, Forster Communications

Caroline Diehl MBE, founder, Media Trust and Community Channel

Carol Eden, head of communications and marketing, Quarriers

Nick Edmans, director of communications, Cats Protection

Judith Escribano, head of communications, Age International

Alison Glossop, publications project manager, Cancer Research UK

Tim Harrison, research director, nfpSynergy

Horacio Herrera-Richmond, creative studio manager, Anthony Nolan

Kirsty Marais, media and communications manager, Alzheimer's Research UK

Janet Miles, head of communications and campaigns, Livability

Vicky Mirfin, director and CEO, Heart of the City

Navprit Rai, communications manager, Trust for London

Dan Reynolds, marketing and development manager, Bethany Christian Trust

Natasha Roe, director, Red Pencil

Deana Selby, publications manager, Dogs Trust

Kellie Smith, copy writer, editor and proof-reader, freelance

Suzanne Westbury, senior editor, The National Autistic Society

Matthew Wright, website planning and content manager, International Institute
for Environment and Development

About Jennifer Campbell

Jennifer works solely with not-for-profit organisations, providing copywriting, editing, journalism, proofreading and editorial project management. She has worked for clients including WWF, Parkinson's UK, Sport England and Girlguiding.

Over the past decade she's worked with more than 60 charities in the UK and worldwide to produce top quality copy, publications and websites, including more than 25 annual reviews.

Jennifer also trains charities in editorial skills.

jennifer-campbell.co.uk

jennifer@jennifer-campbell.co.uk

About Kay Parris

Kay Parris is a freelance writer, journalist and editor with a particular interest in the voluntary sector. She has worked in editorial and communications roles for many non-profit organisations, including Amnesty International, ActionAid, The Big Issue and the International Transport Workers' Federation.

She has also contributed to a wide range of consumer magazines and leads workshops in writing and communication skills.

kayparris.com

kayparris0@gmail.com

About CharityComms

CharityComms (charitycomms.org.uk) is the professional membership body for charity communicators. We're here to improve the standard of communications and champion its role in the sector.

Membership of CharityComms gives you access to great content, examples of best practice, free seminars and exclusive networking events, and a host of opportunities for professional development. Find out more at charitycomms.org.uk/membership

To explore best practice on a range of key communications issues, check out our events calendar at charitycomms.org.uk/events

Designed by bowleydesign.com

First published September 2013

Second edition April 2017

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Our annual report reflects the knowledge, experience and passion that drives us.

*Deana Selby, publications manager,
Dogs Trust*

