

KLWordSmith



Do something amazing with your annual review

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Topics we'll cover



- What are the minimum requirements?
- The key ingredients of an annual review
- Standing out from the crowd
- The advantages of digital and print
- Giving your annual review impact
- Forward planning

Today's goals



- Help you review your organisation's current approach to its annual review, to ensure it's effective
- Use your annual review to do much more than just communicate statutory figures
- Leave with ideas to improve your next annual review – including how best to report impact, picking great case studies and a fantastic format

Hello



- Introduce yourself
- What you want to improve with your next annual review

The minimum requirements



- Every charity has to produce a trustees' annual report and accounts, as a legal requirement
- It's important to understand what the Charity Commission requires from your organisation
- There are two tiers of reporting based on a charity's income size

The minimum requirements



- Less requirements for a charity with an income of less than £500,000

As a minimum, you need to provide:

- your charity's name, address and trustee names
- your structure and details of how you are managed, including how you recruit trustees
- your activities and objectives in the year
- your achievements and performance
- a finance section

www.gov.uk/guidance/prepare-a-charity-trustees-annual-report

The minimum requirements



- If your income is more than £500,000, there are more requirements to fulfill. Charities must follow the guidelines set out by the Statements of Recommended Practice (SORP) guidelines

<https://www.gov.uk/guidance/prepare-a-charity-trustees-annual-report#sorps-for-charities-which-one-to-use>

The minimum requirements



- What are organisations across the sector doing?
- Some are producing a simple document with this information, known as an annual report
- But many are going one step further. They're creating annual reviews and impact reports.

The key ingredients: Audience and aims



- Who is your audience? Individual supporters and donors, corporate donors, trusts?
- The fewer audiences, the more targeted you can be – leading to a more effective annual review
- Be specific and create a profile for these audiences. What will inspire them? What will they want to know?
- Know your audience's consumption habits – how do they want to read your annual review? Online or in print?
- What do you want your key audience to do when they read your annual review? Give money, volunteer?

The key ingredients: Format and structure



- There are lot of things you can do with your review – think about what would inspire your audience to read a charity annual review?
- Size it up – A4, A5, postcard size / landscape or profile

The key ingredients: Format and structure

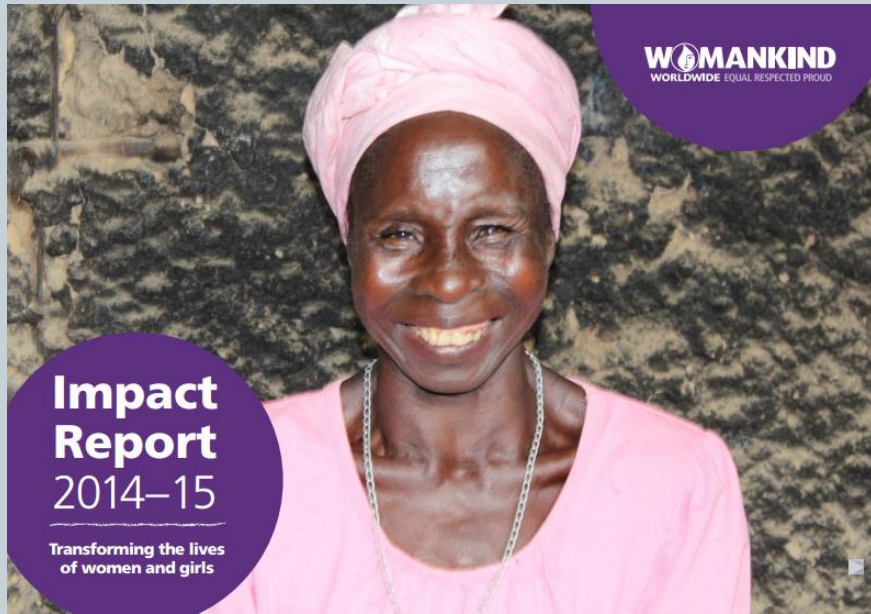


- Choose your content carefully – don't overload the reader

Example structure:

- Who we are and what we do
- Statement from your chief executive or chair
- Area of impact e.g. Ending violence against women and girls
- Key achievements - interweaved with statistics
- Case studies of beneficiaries, individual donors and corporate donors (depending on audience)
- Future plans and call to action – encourage your audience to become involved

The key ingredients: Format and structure



Womankind Worldwide
Impact Report 2014-2015



Age International
Annual Review
2014-15

The key ingredients: Content



- Case studies and quotes
- Statistics – e.g. We've supported over 6.1 million people to have sight-restoring cataract operations
- Impact and achievements
- What do you want people to do when they read your review? Include a call to action

The key ingredients: Content



- Think about the extras
 - What optional content do you want to include?
 - Don't just include it for the sake of it.
 - Always ask yourself 'why does this matter?'
- Embed your organisational key messages into your annual review

The key ingredients: Case studies



- Use your case studies to show your impact – how have you helped to change the life of the individual concerned?
- Use strong cases studies or powerful quotes with images
- Consider penning an introductory welcome message from your case studies

The key ingredients: Case studies

Livability Annual Review 2014-2015

Annual Review 2014-15

livability



STORIES FROM OUR COMMUNITY



The key ingredients: Design and imagery



- Use inspiring and engaging imagery
- Avoid text heavy pages – clean design
- Use sub headings, imagery and video content (if you're going digital) to break up the copy
- Pull out quotes
- Infographics / graphs

The key ingredients: Design and imagery



**Royal Air Forces
Association**
Annual Review 2015



Cats Protection
Annual Review 2015

Can you tick this list off?



Key ingredients

- ✓ Know your audience and aims
- ✓ Format and structure
- ✓ Content
- ✓ Case studies
- ✓ Design and imagery

Standing out from the crowd



- Good things come in small packages – cut your publication down to a more manageable size, A5, postcard size
- Consider going digital and interactive – capture the attention of people who don't have the time to read a print version
- Create bite size chunks of information for your digital version

Standing out from the crowd



Retrak Annual Report 2015-2016



Standing out from the crowd



- Think about a theme - use a title/strapline relating to what sums up your year
- Be creative – think outside of the box
- Make your annual review useful – how can you ensure it stays on people's desks throughout the year?

Standing out from the crowd

The Brain Tumour Charity – won the Third Sector Awards 2016 for its [Annual Report 2015/2016](#)



Standing out from the crowd

Albion in the Community – shortlisted for the Third Sector Awards 2016 for its [Annual Report 2015-16](#)



Standing out from the crowd

See your impact around the world

Here are some of the highlights in 2014-2015 from our work with our partners across Africa, Asia and Latin America...

WOMANKIND
WORLDWIDE EQUAL RESPECTED PROUD

16 girls in Ghana took up leadership positions in their schools following the Gender Studies and Human Rights Documentation Centre training on leadership, self-empowerment and human rights



795 women in Ethiopia are running businesses – such as animal and poultry selling – thanks to the support of Siqqee Women's Development Association. This means the women can now afford to send their children to school and furnish and maintain their homes



Afghan Women's Resource Centre taught literacy skills to 39 previously illiterate women who are members of community development councils. Now that they can read and write they are able to effectively fulfil their role, strengthening women's leadership and contributing to community decisions



Women for Human Rights trained 40 Nepalese women in candle making, embroidery, weaving and other skills enabling them to earn an income and send their children to school



DEMUS's 'Real Men Don't Rape' campaign reached 13,977 people, raising awareness of violence against women and girls in Arequipa, Huancavelica, Lima and San Martin



Centro de Promoción de la Mujer Gregoria Apaza has trained young people in Bolivia about sexual and reproductive rights and violence against



have spread or peers – ing people in s are now challenge ts

Media Action Committee analysts building their port on women's e women have now ped and produced a news. This is improving omen's rights which e male domination of



Afghanistan

Nepal

Ghana

Ethiopia

Kenya

Tanzania

Zambia



Zimbabwe Women Lawyers Association gave free legal advice to 8,031 women, enabling them to make informed decisions and rebuild their lives free from violence



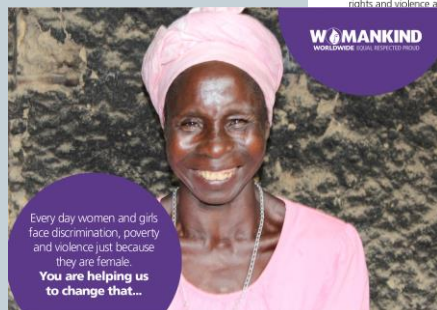
Federation of Women Lawyers in Kenya reached 1 million people through radio announcements on violence against women and girls, enabling individuals to learn about and assert their rights



4,821 refugee women and girl survivors of violence in Tanzania received legal assistance and support from lawyers and refugee paralegals trained by the Women's Legal Aid Centre (WLAC) enabling them to rebuild their lives.



35 girls have gone back to school following Girls Leadership Club members, together with the Zambia National Women's Lobby, conducting community workshops on violence against women and girls, the importance of girls' education and the importance of girls and women's participation in leadership



Every day women and girls face discrimination, poverty and violence just because they are female. You are helping us to change that...

Womankind Worldwide Impact Report 2014-2015

The advantages of digital



- A few years ago an online review meant putting a PDF document of your annual review online, but now your audiences will be expecting some form of online integration
- Interactive calls to action – audiences can click on buttons such as donate, find out more.... This means they can take action immediately
- You can link to videos and animations to make static stories/words come to life

The advantages of digital



- It can (but not always) be cheaper than print
- Captures the mobile market – need to highlight statistics, include white space, break up copy and keep it concise
- Allows you to evaluate through analytics

The advantages of print



- Good for taking to meetings and showing your contacts
- Some people still prefer traditional print publications – know your audience
- You can place it in front of someone – harder to ignore

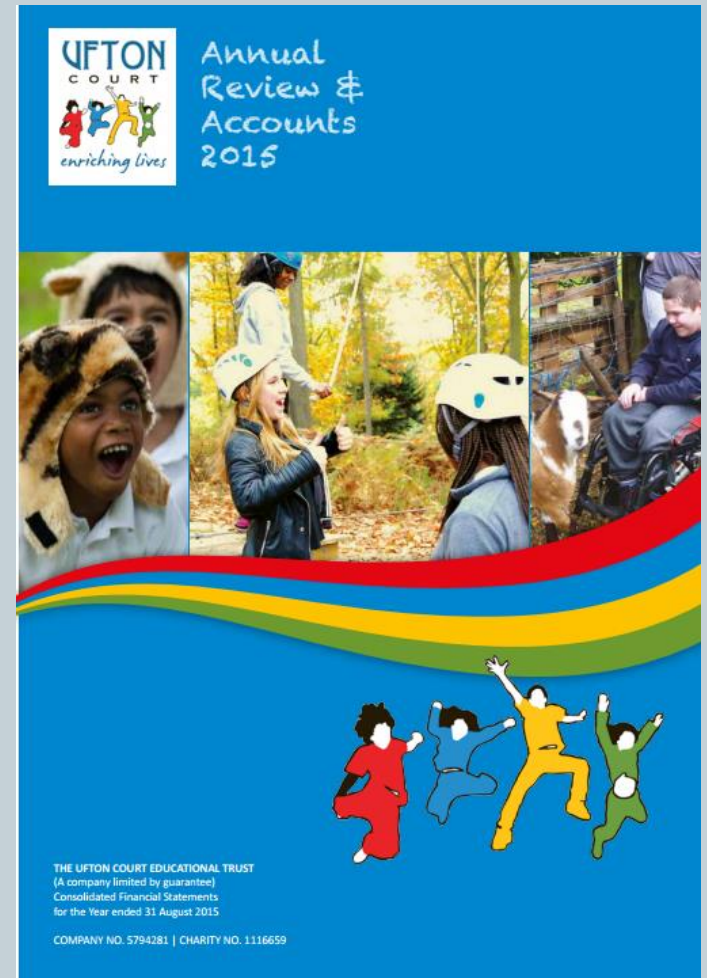
Giving your annual review impact



- Turn your annual review into an impact report
- Use engaging headlines, case studies and statistics....
- Be selective – avoid information overload
- Engage your reader rather than talking at them
- Tell your story
- Briefing on strategic targets and reporting against them

Giving your annual review impact

Ufton Court Review & Accounts 2015



Giving your annual review impact



- Put the important details at the top and the less important at the bottom
- Focus on the action

Giving your annual review impact



- Don't just tell your audience what you have done, tell them the difference your charity's work has made
- Think about this as two parts of the equation:

activity + benefit = impact

Giving your annual review impact



- 8,031 women have received free legal advice
- 120 women survivors of violence were provided with training, start-up kits, seed money, resources and counselling

Giving your annual review impact

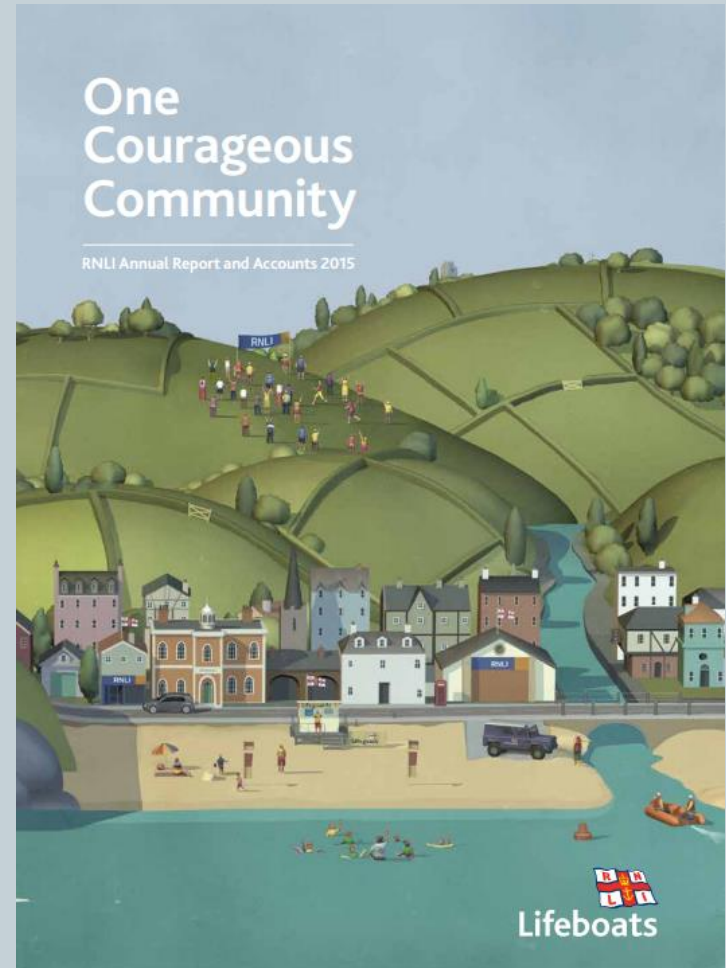


- 8,031 women have received free legal advice, **enabling them to make informed decisions and rebuild their lives free from violence**
- 120 women survivors of violence were provided with training, start-up kits, seed money, resources and counselling, **allowing them to become financially independent and contribute to their household budgets**

Giving your annual review impact

RNLI

Annual Report and Accounts 2015 -
highly commended at the
Third Sector Awards 2016



Reporting impact



- What three activities does your organisation do?
- What are the benefits of these?

Forward planning



- Start planning for your next annual review straight after you have finished your last one
- Collect information throughout the year – be prepared. It's surprising how fast time can go
- Think about what you need – key achievements and impact examples, case studies, a list of people to acknowledge/thank and future plans – and let your colleagues know in advance

Forward planning



- Have a meeting with all relevant colleagues to brainstorm and suggest ideas
- Ensure stakeholders feel part of the process. An annual review is an exciting product, so it's good to build enthusiasm and secure buy-in. This will help to ensure you source the information you need
- Adopt a culture of reporting impact, rather than a once-a-year annual review mentality

Forward planning



- Prepare a brief and timetable
 - get everyone to feed into this and then sign off
 - include audience, aim, tone of voice, content plan and structure
 - Work backwards on the timeline to ensure you fit in all key processes
 - account for design time and sign off from senior staff

Over to you



How are you going to improve your
next annual review?

Advice and tips



- **CharityComms**

www.charitycomms.org.uk/articles/a-year-in-the-life

- **Jennifer Campbell**

www.jennifer-campbell.co.uk

- **Kellie Smith**

www.klwordsmith.com