

The Clinic Annual Report

Annual reports can help:

- demonstrate your accomplishments to current and future donors
- cultivate new partnerships
- recognize important people
- provide an indication of the performance of your clinic
 - play an important role in the future of your clinic

It is important to boil down essential information in a financial report so that it is as short as possible in order to be easily read. Write from the heart and appeal to the mind.

Guidelines for your clinic's annual report:

1) Accomplishments

- Focus on your biggest accomplishments
 - Narrow these down to a top 3 or 4
 - This may mean you have to eliminate some smaller victories
 - Providing a more powerful story to fewer accomplishments will actually be more memorable
 - Use your other accomplishments as content for:
 - blogs
 - newsletters
 - e-mail outreaches
 - your website
- Make sure to include not only the accomplishment but a story to go with it
 - Explain:
 - why you did it
 - what the results were
 - why the clinic's resources were spent in this particular way
 - relate/tie all of that to your mission statement

It is important to show accomplishments that are supportive of your clinic's purpose. Large fundraising events should not always be the focus of your accomplishments. The financial section of your annual report is best for this. It is important to raise money, but people would rather know what you did with that money to make a difference in your community.

2) Photography

Photos are a good way to tell a story quickly. With a relevant photo and caption, you can boil down paragraphs of information into quick excerpts. Photos are also a great way to put a "face" to your clinic, providing visual examples of how your clinic makes a difference in the lives of people and the community. Use the caption to connect the photo and the accomplishment. With a good photo and caption, readers should quickly understand the essence of who you are and what you do.

3) Real People

Donors will be more impressed with real stories about real people than general summaries of your work. In fact, it is better to extrapolate an individual story to make a point than to provide generalizations that seem vague.

Use Stories to: Pull example from book

- explain what you have accomplished overall
- humanize your statistics with personal profiles
- highlight how your work helped a specific individual
- share how a volunteer made a positive difference

4) Financials

Many of your donors won't know how to read a financial statement or won't take the time to read it. Include a paragraph or two that explains in plain English what the tables say. Include interesting charts that tell the story easier and more dramatically than just numbers.

Answer these questions:

- Where does your money come from and how do you spend it?
- What are your main fundraising strategies?
- Did you implement any cost-savings measures this year?

5) Donor List

Include a list of any donors or supporters. It is important not to let the donor list increase the size of your annual report too extensively. Find a balance between listing larger donors in the annual report and recognize smaller donors in e-mails, newsletters, and on your clinic's website; make certain that you list at least to the \$100 level so as to assure that people do not feel overlooked. Make sure to double-check the spelling of all donors so they continue to support your clinic.

Fund Appeal

Be certain to note on your fund appeal that donors may be recognized and provide an opportunity for an individual to opt out of such identification if they so desire. Use this section to inspire future supporters of your clinic and provide information needed to become a donor.

Refer to the template letter instructions in the Fundraising Section of this module.

6) Design

An annual report should not feel like a report at all. Allow someone who is a design specialist to create an annual report that touches the heart as well as the mind. It is important to integrate this as part of your branding and communications plan, making your brand stronger. Create a report that inspires people to want to partner and associate with your clinic.

7) Distribution

One of the largest expenses with an annual report is the printing cost. With today's technology and an awareness of the environment, consider new avenues of distribution. One thought is to take the designed annual report and create a PDF or web page for distribution through your website, blog or email outreach campaigns. You could also consider making a video of your annual report and distributing it

through social media sites such as YouTube. This is a little different but also an innovative idea to reach your audience in a new way.