



Advanced Annual Reports for Print and Web

The webinar will begin at 3:30 p.m. EDT



Presenter: Mazarine Treyz
Facilitator: Mike Preston



Advanced Annual Reports for Print and Web

Presenter: Mazarine Treyz, Author
The Wild Woman's Guide to Fundraising

About the presenter

Mazarine Treyz



Has made some pretty good annual reports and some real stinkers and she will share with you what she's learned about making a good one!

Author of the 5 star rated: Wild Woman's Guide to Fundraising, The Wild Woman's Guide to Social Media, and Get the Job! Your Fundraising Career Empowerment Guide

Mazarine consults with nonprofits nationally and internationally to get better fundraising results.

Poll Question 1

Are you making a print and an online report?

- a) Just print
- b) Just online
- c) Both

Poll Question 2

What were some problems with last year's annual report?

- a) Not enough donations through it
- b) No one read it
- c) Bad design
- d) Other/I don't know

What You'll Learn Today

- Annual report covers: trends in graphic and magazine design- what's next?
- How can you make your annual report work for your fundraising?
- Getting more major donors through making financial transparency fun
- Helping donors see themselves in your story with your annual report
- Where should you put your online report?

MORE of What You'll Learn Today

- Design essentials for your online annual report
- Resources for creating snazzy pictures and infographics for your nonprofit
- How to get testimonials for your annual report
- How to get your annual report printed for cheap or free

Making a better cover for your annual report

- Paid vs. Free
- Student designers



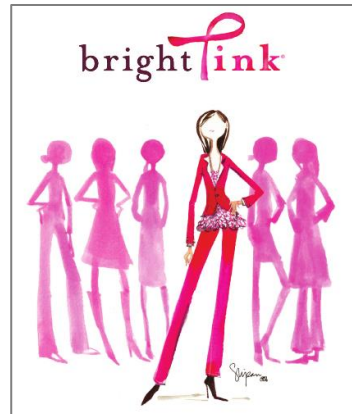
Annual report cover trends:
Make it wide, not tall



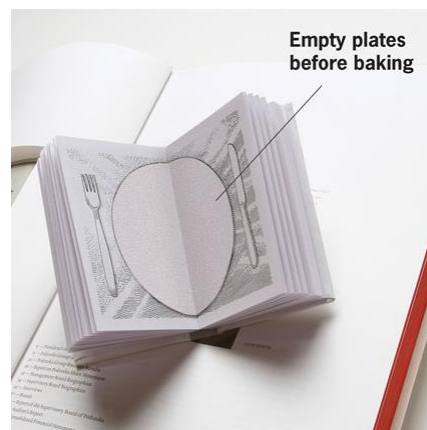
Annual report cover trends:
Make it wide, not tall



Annual report cover trends: Organic Design Elements



Annual report cover trends: Thermo-reactive ink



Annual report trends: Thermo-reactive ink

Called Well Done, the report features blank pages printed with thermo-reactive ink that, after being wrapped in foil and cooked for 25 minutes, reveal text and images.



Annual report trends: Skeuomorphism versus Flat Design



Annual report trends: Skeuomorphism versus Flat Design



How can you make your annual report work for your fundraising?

- List accomplishments, not activities
- Stories about real people
- The financials
- Ample appreciation
- Call to action



How can you make your annual report work for your fundraising?

Giveback Donors



"We are privileged to support one of the most respected children's hospitals in the world. Our son was treated for cancer at SickKids for many years and we will never forget the dedication and level of care he received. We are confident our gift will help create more positive outcomes for cancer patients and their families."

— Myron and Berna Garron

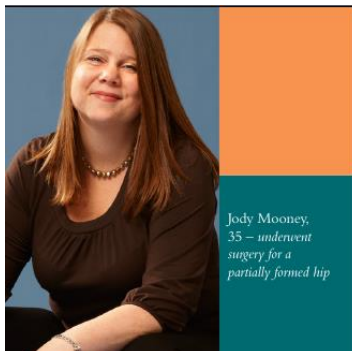


"I am a SickKids kid. I give back because I am a survivor. I support leukemia research to change the lives of other children; the way mine was forever changed many years ago."

*— Deborah Bianchi,
Founder, Hats Off 2 Kidz*

How can you make your annual report work for your fundraising?

Very Short Stories



Jody Mooney,
35 – underwent
surgery for a
partially formed hip

When Jody brought her eldest daughter Vanessa to see an orthopaedic specialist at SickKids, it brought back lots of memories. At 18 months old, Jody underwent surgery at SickKids for a partially formed hip socket. She spent long hours learning how to walk all over again.

Making the long road to recovery shorter and easier



How can you make your annual report work for your fundraising?

Very Short Stories



Amanda Turkiewicz, 24 – living with cystic fibrosis

Every day, Amanda pushes her limits to improve her quality of life. This could mean climbing just one more flight of stairs – which can sometimes leave her gasping for breath. Amanda has cystic fibrosis (CF), a condition that affects the lungs and the digestive system, making it tough to breathe. For her, every extra step is a big accomplishment.

A history of firsts in cystic fibrosis research at SickKids



One in every

How can you make your annual report work for your fundraising?

Leadership Donor & Volunteer Appreciation



Thank you Patsy Anderson

A model for volunteer and philanthropic leadership

On June 14, 2011, Patsy Anderson presided over her last meeting as Chair of the SickKids Foundation Board of Directors. Her decade-long tenure on the Board – the last five as Chair – was a time of tremendous growth at SickKids. In her first year on the Board, the Foundation raised a total of \$66.7 million. This year, the Foundation raised \$106.8 million – a 60 per cent increase over a challenging economic period. Patsy and her husband Jamie have themselves generously contributed more than \$1 million to SickKids. But her impact goes far beyond dollars raised.

Patsy has emerged as a model of volunteer and philanthropic leadership in Toronto and across the country. Her passion for SickKids over the years has been contagious. She often referred to serving on the Foundation Board as the “greatest honour” in the life of a volunteer. “We have the dream cause,” she said. Her enthusiasm, coupled with the personal time and energy she has contributed to the Foundation, have been central to creating and nurturing the exciting momentum we are now experiencing.

As we say a heartfelt “thank you” to Patsy, we also remember that she is symbolic of the many tremendous volunteers and donors that we are privileged to work with at SickKids. We thank you all!

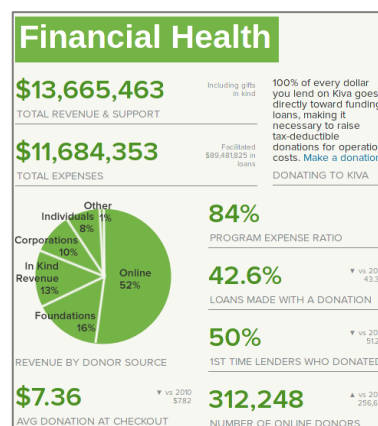
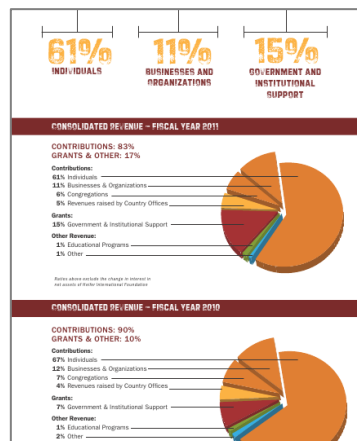
How can you make your annual report work for your fundraising?

Consider having a gratitude report instead of an annual report

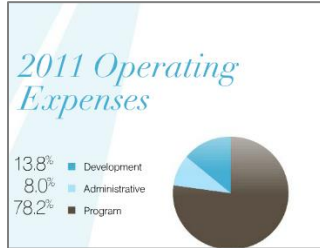
Organize your report around donors, like The New School in NYC



Getting more major donors through making financial transparency fun



Getting more major donors through making financial transparency fun



Better Business Bureau



Mercy Corps meets all 20 of the Better Business Bureau's standards for charity accountability.

Charity Navigator



Mercy Corps received four out of four stars from Charity Navigator, the premier American charity evaluator. In earning Charity Navigator's highest four star rating, Mercy Corps has demonstrated exceptional financial health, outperforming most of its peers in its efforts to manage and grow its finances in the most fiscally responsible way possible. [Review our four star rating ▶](#)

American Institute of Philanthropy



The American Institute of Philanthropy, a leading charity watchdog agency, awarded Mercy Corps an "A-" for financial efficiency in its CharityWatch rating guide.

Helping donors see themselves in your story with your annual report (as volunteers)

GET INVOLVED. BE INSPIRED.

19

At CCA, volunteers are our heart and soul, fueling programs that bring the joy of music, the magic of wishes, the power of information and the comfort of friendship to thousands of seriously ill children and their families every year. As a CCA volunteer, you have the power to change the lives of those in need. In return, you'll find your own life changed by the extraordinary spirit of these courageous kids.



At CCA, volunteers help to power every aspect of our organization from directly

Become a mentor to a child or teen going through treatment in Oregon

OUR DONORS ...



...VOLUNTEER THEIR TIME

Inspired by her daughter Abby's experience at Eugene Lang College, The New School for Liberal Arts, independent educational trust publisher Susan [Name] joined the Eugene Lang College Board of Governors so that she could work directly with the faculty and administration to nurture the institution's like many parents of New School students and alumni, Susan brings a fresh perspective to the table.

"I support the annual fund because it helps the school continue growing each year," said Susan. "My son studied with the variety and depth of the courses at Lang. The smaller classes helped her hone her creative thinking skills." Annual fund support helps keep classes small, provides a scholarship for talented students, allows the university to attract top faculty, and enables students to participate in civic engagement projects.



Getting more major donors through making financial transparency fun

IMPACT, NOT OVERHEAD

There is a movement in the nonprofit sector to pay more attention to the impact of the work being done aside from the percentage spent to achieve that impact. It is Heifer's goal to ensure at least 75 percent of spending goes to our programmatic mission. We know that the percentage of expenses that go to program costs compared to the percentage of expenses that go to administrative costs is a common indicator of efficiency. Heifer has always strived for fiscal efficiency and accountability. Despite that, in comparison to some other development organizations, our overhead number is larger than some and smaller than others. For Heifer, the story behind our numbers is about the time and effort Heifer puts into training, and, when a project is nearing its final stages, into follow-up.

TRAINING AND PREPARATION FOR LIVESTOCK TYPICALLY TAKES AN ENTIRE YEAR. OFTEN, BENEFICIARIES RECEIVE TRAINING IN SIX OR SEVEN DIFFERENT TOPICS TO PREPARE THEM FOR THE GIFT OF AN ANIMAL. ADDITIONALLY, HEIFER WORKS FOR TWO YEARS AFTER A PROJECT'S COMPLETION TO MONITOR AND EVALUATE WHAT CHANGES ARE HAPPENING IN OUR PROJECT COMMUNITIES THROUGH OUR OWN EVALUATION PROCESS.

So while our overhead might be a little higher, our impact is substantially higher, as well. For example, governments, major international non-governmental organizations, and partners continue to adopt the Heifer model, furthering our work in communities not directly touched by a project.

Heifer also works to minimize administrative and fundraising costs. This can be a challenge since the majority of support comes from small, individual donations. Reaching out to millions of donors individually can be expensive. On the other hand, those donors who respond to Heifer tend to give more, and for longer periods than donors to other organizations. But Heifer continually strives for cost savings and efficiency improvements to maximize programmatic funding.




➤ 1.9 MILLION FAMILIES ASSISTED

Overall, the estimate of families assisted and impacted are in line with the general trend. Over the last year, Heifer was able to assist more than 1.9 million families directly and indirectly—up from 1.6 million in the previous year. Heifer's contribution to impact is largely on track and is meeting with the overall trend. Additionally, government, major international non-governmental organizations and partner organizations continue to adopt the Heifer model, and Heifer's education programs have produced beneficial impacts consistent with the Commitment and the Board Ends. The areas of environmental stewardship, managing financing on the gift expectations, and youth involvement were identified for further improvement.



AFRICA = 220,275
Number of families assisted directly and indirectly

AMERICAS = 934,871
Number of families assisted directly and indirectly

ASIA SOUTH PACIFIC = 407,640
Number of families assisted directly and indirectly

CENTRAL AND EASTERN EUROPE = 344,945
Number of families assisted directly and indirectly

Helping donors see themselves and who they help with your annual report

OUR DONORS ...

...SUPPORT EXCEPTIONAL MUSICIANS

Providing a platform for music that begins in early childhood, pianist and piano teacher **MAURICE GARDIN** established the Maurice Gardin Music College The New School for Music. His broad experience of Maurice inspired her to include the school in her estate plan. The Maurice G. Ruback Piano Scholarship, made possible by her bequest to Maurice, gives young pianists the opportunity to study with Maurice's outstanding instructors. The endowed scholarship, awarded to one piano student per year, will help students in perpetuity enabling future generations to receive a world-class music education.

...NURTURE FUTURE JAZZ GREATS

Long-standing Annual Fund patron **FRANK** and **JOANNE** are committed to supporting and nurturing New York City jazz scene. Their generous gifts to The New School for Jazz and Contemporary Music enable the division to direct funds where they are needed most. Gifts like theirs help the school meet world-renowned instructors, foster studio maintenance and upgrades, purchase musical equipment, provide scholarship support, and expand academic programming. They also provide talented students with opportunities to perform in leading cultural institutions not only in New York City but around the world.

...BUILD COMMUNITY RESOURCES

Thanks to a grant from the **JOHN D. AND CATHERINE T. BROWN FOUNDATION**, funded by an endowment gift to New York City public schools—has moved to The New School's Center for New York City Affairs. New School graduate students have visited clinics throughout the five boroughs, gathering detailed information for the city. The clinic, first operated by an institution that is passionate about helping New Yorkers understand the city's education system, said David C. Goff, program director at the foundation. The New School's Center for New York City Affairs is just the kind of institution."

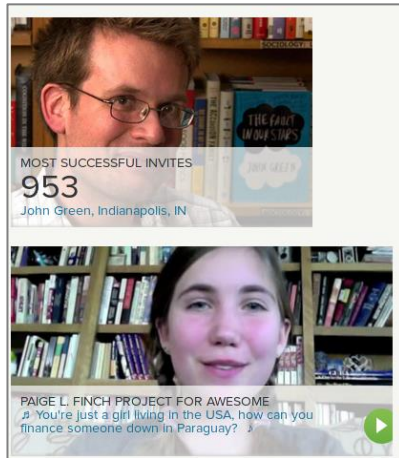
...ASSIST FUTURE STUDENTS

Recognizing the importance of The New School for Social Research in shaping his life in psychology and culture, **FRANK** decided to help future graduate students by establishing an endowed fellowship in honor of the donor and former professor, Mary Burke. Reflecting on his time as a PhD candidate at The New School for Social Research in the 1970s, Goff said, "I could not have asked for a more thorough preparation for my first job as an assistant professor. More relevant, however, is that my graduate studies inspired my analytical thinking, a basic skill for any job." He added that Mary Burke in particular challenged students to question long-held views.

As a recipient of the Heifer's Heifer Fellowship at The New School for Social Research, Goff knows firsthand how essential financial support can be for students. "This funding made a huge difference in my ability to complete my dissertation in a timely manner," he said. "I feel passionate about giving back to the institution that gave so much to me."



Helping donors see themselves in your story with your annual report



Helping donors see themselves in your story with your annual report



PLANNED GIVING: A JOYFUL LEGACY

"My experience has taught me to value life. You never know what tomorrow will bring, so I live for today" – Janice Phillips

Native Oregonian Janice Phillips believes in living for today, but also recognizes the power of leaving a lasting legacy. A graduate of the University of Oregon and the youngest daughter to the former President of the Oregon Symphony, Janice's Oregon-based roots run deep. In fact, it is this profound love and respect for the Pacific Northwest that influenced her decision to get involved with the Children's Cancer Association.

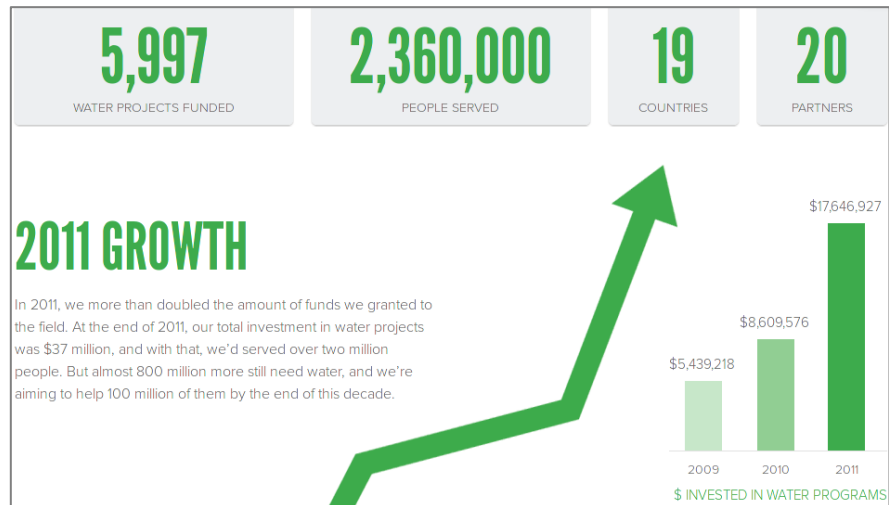
In 2005, when Janice read about the life and death of a young boy served by CCA's programs while he was fighting brain cancer, she was immediately compelled to get involved and make a difference. Her own personal experience fighting a debilitating brain tumor has provided insight into battling a life-threatening condition and left her with a unique compassion for the children and families served by CCA.

After years of generous support, Janice made a decision to include CCA as a beneficiary in her will, ensuring that CCA's programs will continue to meet the non-medical needs of seriously ill children and families for years to come.

Janice has joined CCA's Founder's Society, which recognizes the foresight and generosity of friends who have provided for the long-term support of CCA by naming CCA as a beneficiary in their will, trust agreement, retirement account, life insurance policy, or other estate planning vehicle.



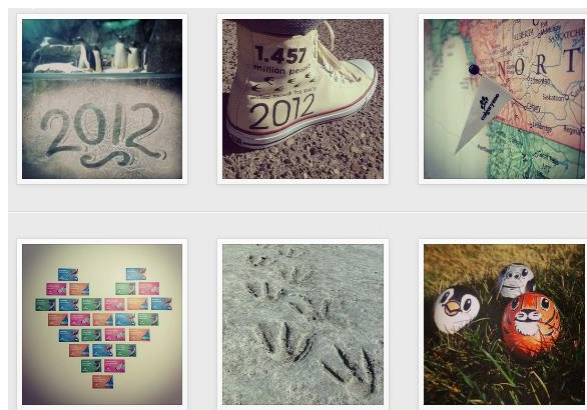
Online versions of annual reports



Online versions of annual reports

Using Instagram

Look at: Calgary Zoo <http://instagram.com/CalgaryZoo2012AR#>



Online versions of annual reports

<http://www.flipsnack.com>

Let's look at: Open Arms of Minnesota <http://www.openarmsmn.org/aboutus/publications/scoopannualreport/>

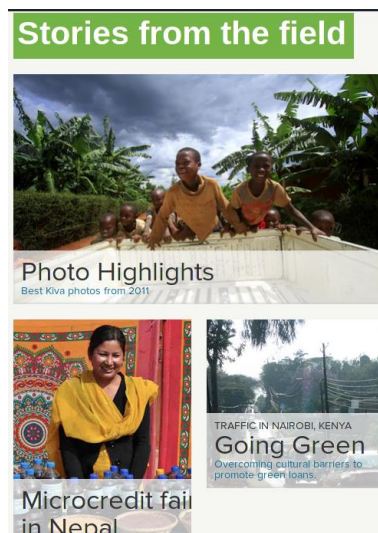


Online versions of annual reports

Customized website

Let's look at Kiva.org

<http://annualreport.kiva.org/press>



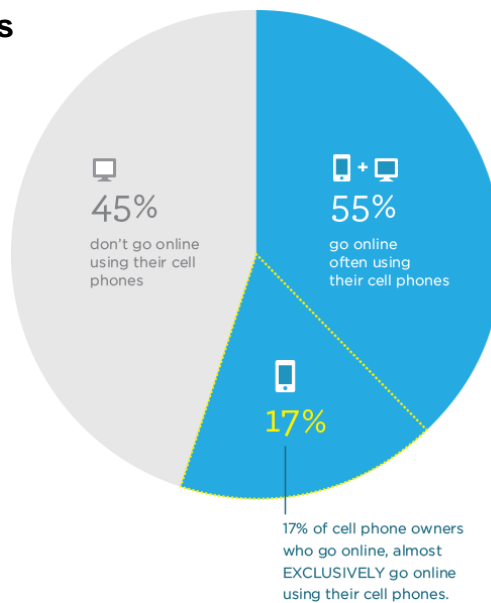
Where should you put your online report?

Things to Remember

- Viewing websites on smart phones & tablets



Mobile Usage Statistics



Where should you put your online report?

Your website

- As a PDF (use Libre Office to turn a doc into a pdf)

Celebrating 20 years of providing nutritious meals to seniors in need!

Fiscal Year 2013 Annual Report

October 1, 2012—September 30, 2013



Meals on Wheels of Lamoille County, Inc. is a community based 501(c)3 non-profit organization located in Morrisville, VT. Our mission is to improve health and independence for seniors throughout Lamoille County by providing delicious and nutritious meals via home delivery and senior community meal sites.

Where should you put your online report?

Your website

- Content Management Systems



Where should you put your online report?

Other Websites

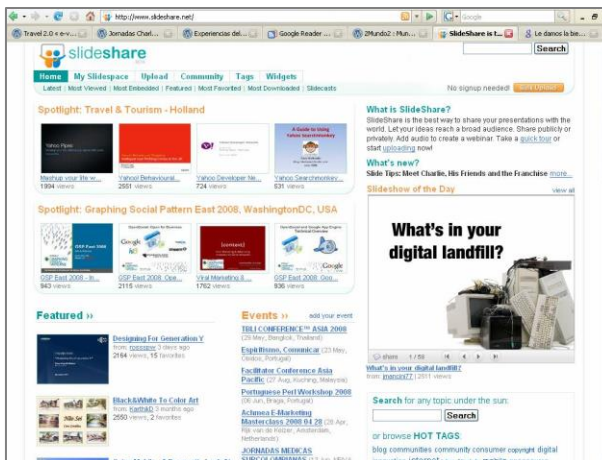
- Issuu
- Zmags



Where should you put your online report?

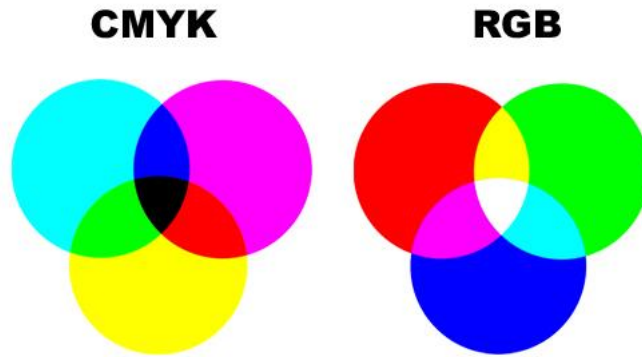
Other Websites

- Slideshare
- Scribd



Design essentials for your annual report

- Print vs. Web
- File size considerations



Design essentials for your annual report

- Ideal fonts for web vs. ideal fonts for print
- URL of annual report - do's & don'ts

Serif
vs.
Sans-serif

Design essentials for your annual report

Fonts

- serif vs. sans-serif

Times New Roman

Caslon

TRAJAN

Cooper Black

Goudy Old Style

Calibri

GOTHAM

Myriad

Comic Sans

Impact

Design essentials for your annual report

Fonts

- Create a feeling

*My deepest sympathy
and condolences*

**My deepest sympathy
And condolences**

Image Caption: Monotype Corsiva vs Bauhaus 93

Important

Important

ANCIENT

ANCIENT

casual

Casual

Image Caption: Fonts Should Match their Rhetorical Situation

Design essentials for your annual report

How do you pick fonts for your report?

- First determine what is it you want to communicate
- Pick some adjectives for your non-profit



What makes a good infographic for your nonprofit

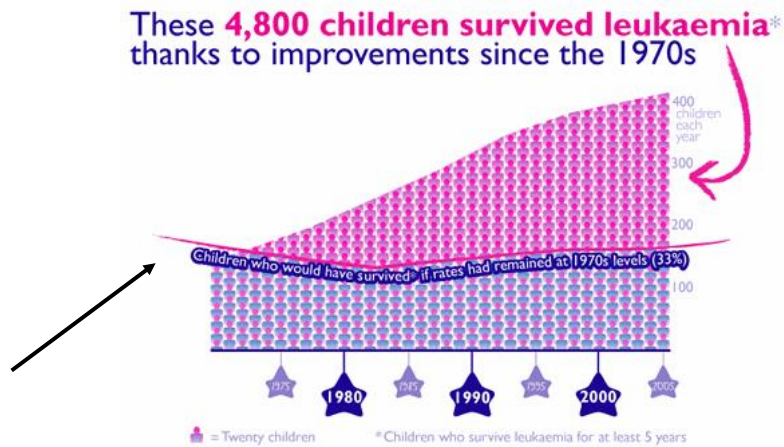
What is an infographic?

A visual image such as a chart or diagram used to represent information or data.

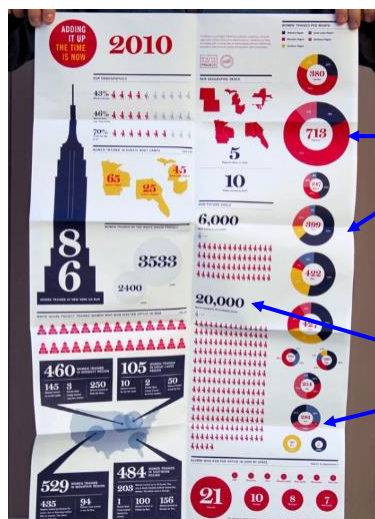


What makes a good infographic?

Good example of showing the impact of your programs:
Use line charts to show time



What makes a good infographic?



What makes a good infographic?

- No 3-D charts
- No more than 5 slices to a pie chart
- Extend bar charts to zero
- Order bar charts by size
- Direct labeling whenever possible
- Use 2-3 colors at most.

Resources for creating snazzy pictures and infographics for your nonprofit

Don't just throw data at people. Use it to help the reader clarify the story.



Our Meals on Wheels recipients experience the following:

*Increased ability to remain in own homes and communities.

*Decreased loneliness.

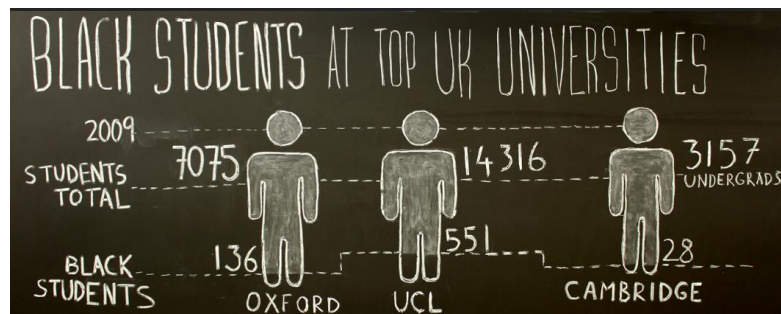
*Increased ability to heal after illness or other health problems.

*Increase in overall health.

Volunteers	Miles Driven	Meals Delivered	Hours Donated	Smiles Exchanged
165	60,000	33,380	14,000	50,000

Resources for creating snazzy pictures and infographics for your nonprofit

Alternatives to using a design program to create a infographic:



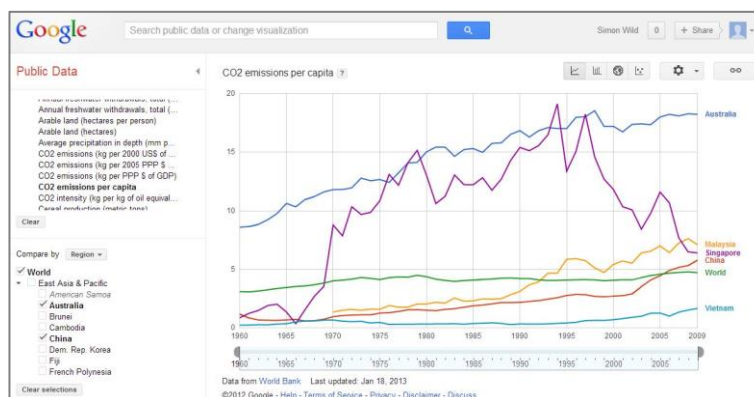
Resources for creating snazzy pictures and infographics for your nonprofit

Alternatives to using a design program to create an infographic:



Resources for creating snazzy pictures and infographics for your nonprofit

Data Resources



Resources for creating snazzy pictures and infographics for your nonprofit

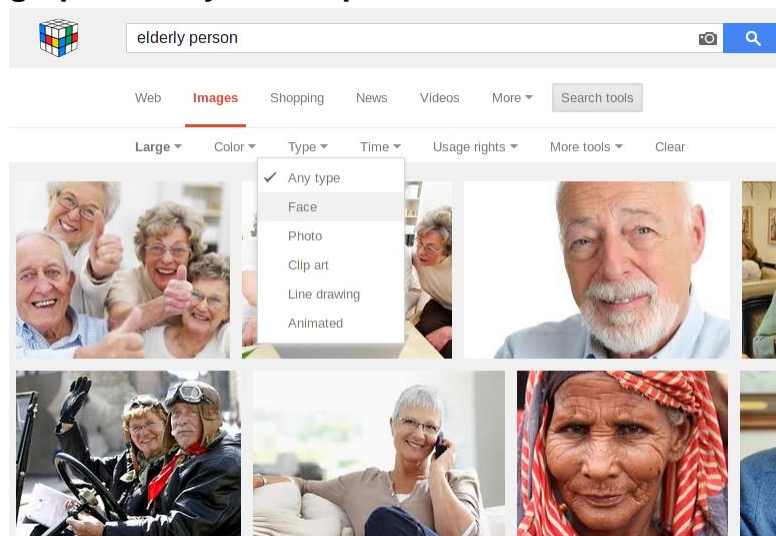
Photo Tips

<http://photography.nationalgeographic.com/photography/photo-tips/>



Resources for creating snazzy pictures and infographics for your nonprofit

Where to find free images: Google Search & Flickr



Resources for creating snazzy pictures and infographics for your nonprofit

Where to find free images:



New York
Public
Library



LIBRARY OF
CONGRESS

Getting testimonials from corporations for your annual report

- Gather from sponsorship surveys
- Gather from followup after sponsorship report
- Gather in meetings with board members

How to get your annual report printed for cheap or free

- Ask corporation to sponsor your annual report in return for having their logo on the back cover
- Ask your usual printer, as a loyal customer, if they could do 1 job for you pro bono

How to get your annual report printed for cheap or free

Don't just mail to everyone!


Email it to everyone, and if they want a print copy, ask them to respond to the email with their request.

If you don't have their email, send them a postcard and ask them if they want one, if so, tell them to fill out their info on your website, at something simple like: <http://report.yournonprofit.org>

How to get your annual report printed for cheap or free

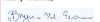


Ideas to make your annual report better Meals on Wheels of Lamoille County

 I am thrilled to be back at Meals on Wheels of Lamoille County (MOWLC), after nearly 2.5 years away pursuing other career goals. I truly missed the people, the community and our mission. This year is especially exciting as we are celebrating our 20th year of providing Meals on Wheels services in Lamoille County. This milestone has been reached, thanks in large part, to the support from our local community. Due to our funding structure, we would not be able to serve the hundreds of seniors that we do each year without contributions made by individuals and businesses throughout the county. These contributions include donations of time, money, and food. We are thankful to all who have helped us improve the lives of seniors in the past and those who continue to help us meet these needs in the future!

In the coming years our program, and other Meals on Wheels programs throughout the nation, are facing changes to the way we do business. We are all experiencing the perfect storm of increasing costs, changing demographics in the population we serve, and decreased funding. At MOWLC we are bracing ourselves for this change by continuing with the strategies that work: partnerships with other organizations and community groups, utilization of the local community for support including volunteers, sound fiscal management, and strategic planning around how to meet future demands with the least amount of negative impact to the seniors who rely on us. We are a strong business with the passion to help seniors in need and this will help us weather any storm!

I hope you enjoy reading about our accomplishments in fiscal year 2013 and beyond.

Many Thanks,

Mary Ann

More donor centered language:

- You have made this possible
- Without your support we could never have...
- You know that mission is urgent.
- Active verbs, not passive. "our core strategies to achieve vision ARE simple"
- Do a grade level readability test.

Ideas to make your annual report better Meals on Wheels Lamoille County

- Senior Nutrition Facts**
- 1 in 4 older Americans suffer from poor nutrition. Malnutrition can lead to lost weight & strength, decreased immunity, confusion and disorientation. It leads to increased visits to doctors & hospitals/ER, hospital stays are 2 times as long as well-nourished individuals and re-admittance is more likely.¹
 - Nearly 1 in 6 (8.8 million) seniors face the threat of hunger. This is an 88% increase from 2001. Those with lower income are more likely to be food insecure than those with higher incomes.² **32% of our recipients are considered below poverty, making less than \$930.83/month for an individual or \$1,260.83 for a couple. Many who are above this limit report that they make only slightly above this amount.**
 - Seniors living alone are 2 times as likely to experience hunger as married individuals.³ **44% of our recipients live alone.**



Eunice Tosta, 92, and Marcelle Falcone, MOHW volunteer driver & board member. Our meals help give Eunice the energy she needs to continue with her love of working outside & increases her independence. Eunice stated, "The meals are very good quality and there isn't anything that I would refuse!"

Stats lack context.

How much did need increase?
From 2011? From 2012?

You saw more seniors
this year. *Is this an
increase in need?* If so,
the mission is urgent.

Is this a decrease?
If so, we're winning!
Let's keep working until
all seniors are off the
waiting list!

Ideas to make your annual report better Meals on Wheels Lamoille County

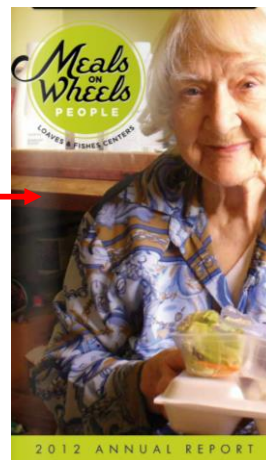
Celebrating 20 years of providing nutritious meals to seniors in need!

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Poll Question 3

What are you planning on doing now that you've taken this webinar?

- a) Better graphics for the financials
- b) More stories of our donors and volunteers
- c) Making an online version/not mailing to everyone
- d) All of the above

Q&A



Thank you for coming today!

Let Mazarine know what you're working on:

512-763-5161

info@wildwomanfundraising.com

If you would like more annual report advice, check out
<http://wildwomanfundraising.com>



Upcoming Webinars

June 3 & 5 – Business Planning to Survive in Uncertain Times, a free two-part webinar from the National Resource Center on Nutrition and Aging

June 10 – Multiple Options for Menu Planning

Info at: <https://www.mowaa.org/webinars>