

Annual reports: a step-by-step guide

An annual report is a fantastic opportunity to celebrate your accomplishments and publicise to your pupils, parents, staff and volunteers, funders, local authorities and mainstream schools just what you have achieved. Don't be daunted at the thought of writing your annual report. Just follow our step-by-step guide and you'll be on your way.

Step 1: Involve the management committee

Make sure the management committee is fully involved in all of the steps below, particularly the Chair and the treasurer, who will have specific tasks (eg producing financial statements). Extend the group involved in producing the annual report to include staff and volunteer representatives, as well as pupils and parents, if possible.

Step 2: Plan ahead

Consider:

- When is your annual general meeting? When do you need the report?
- What is your budget? You will probably need to print/photocopy the report, so why not ask a local printer to give a discounted rate in return for advertising space?

Devise a schedule and stick to it (see the example below).

Step 3: Decide what your report should contain

- Agree who is going to write what and complete a 'content plan', like the one on the opposite page.
- Decide if you are going to approach businesses to advertise in your report, as it could generate income to cover the printing. Who will be responsible for contacting businesses?
- Who is able to do the design work? Does anyone in your school have the skills? Are the pupils able to contribute?

Step 4: Support each other

An annual report should be owned by the entire school, so ensure that everyone has the opportunity to have an input. The annual report could, for instance, include comments and quotes from parents, and examples of work from pupils. Remember – the report is a marketing tool to promote how great your school and the services you offer are.

Step 5: Check and check again

Ask a few people to proofread your report before it goes to print. Approach someone who knows very little about your school and ask for their feedback. Do they have any questions? Have you missed any vital points?

Annual report schedule (example)

Production process

Group meeting to decide on content (involve management committee, staff and volunteers, and pupils)

Start writing the report

Copy deadline

Editing process

Design/proofing

To print

Ready for annual general meeting

Due date

Early January 2012

Mid January 2012

28 February 2012

1 March 2012

8 March 2012

Last week of March 2012

Middle of April 2012

Step 6: Publicise what you do

Print extra copies of your report. Promote your school's work by: asking pupils to give some copies of the report to their mainstream school teachers; sending some copies to your funders; leaving copies in the local community centre, library, and so on. Note that to be easily printable, your report will need to be in multiples of four pages (eg 8, 12).

	Who	No of pages	Agreed (yes/no)	Deadline	Received (yes/no)	Photo consent form received (if applicable)
1: Front page (Name of organisation and picture)						
2: Chair's report (Present a 'statement of intent' and explain your group's future vision.)	Chair					
3: Contents						
4: Give lists of donors, sponsors/supporters and helpers/members of the board and committee. (Including the names of people and organisations that support you not only gives them deserved recognition, but also helps to promote all those involved.)						
5: Give clear statements of your group's aims and vision. (The expression of your vision should be clear and consistent throughout the report: in any introductory pages; in the Chair and CEO's reports; in the reports on activities undertaken during the year; and in other items, such as expressions of appreciation to stakeholders.)						
6: Describe your group's activities and programmes. (Showing what you have achieved, and how your group has achieved it, is an integral part of your report.)						
7: List your group's achievements. (Marketing your group is not only about who you are, but what you have done. Outlining the objectives that the group has achieved in the past year, and explaining how it has done this, will promote your group as one which successfully backs up its vision with action, as well as showing that it is a 'can do' organisation.)						
8: Include case studies that demonstrate the practical results of your work. (Case studies show clearly what your group can achieve. They show the human face and end results of your group's philosophy, policy and planning.)	Pupils, parents, volunteers, staff					
9: Treasurer's report (Break down income streams, and the project income required for the following year. Outline your plans to generate income.)	Treasurer					
10: Annual accounts	Treasurer/ accountant					
11: Any acknowledgements (You may wish to thank people who have provided financial and other support for producing your report, as well as listing any photo credits.)						
12: Back cover (Perhaps put your school's logo and contact details on this page.)						