How to Plan your Nation's Annual Report

A thoughtful and well-produced Annual Report is an essential communication tool. A well-planned report manages to convey very simply who you are, what you stand for and your progress in meeting the goals you have set out.

The annual report is a key ingredient to enact transparency with membership. You can think of your annual report as an artifact in that it is there to represent your Nation when there isn't a human there to share who you are. Industry, local government, and others that your leadership may be meeting with also look at your website and your Annual Report to get an idea of who your Nation is.

The process of developing content for the report provides the communicator an opportunity for relationship-building with staff and leadership, as you interview them and learn about their priorities and collect future story ideas.

A professional graphic designer can put the elements of an annual report together in a polished way that will effectively communicate the heart and soul of your Nation or organization's mission.

The following sections describe some of the more common elements found in annual reports and provides some examples of innovative annual reporting.

Annual Report Ingredients

Front and Inner Cover - Name, Logo, and Tag Line
The name of your Nation, logo, and tag line, should be prominently featured early in the annual report, usually on the front cover. Many reports repeat all three elements throughout the book.

Contact Information
The Nation's mailing address, phone, Web site and e-mail addresses should all be easy to find. This information is often displayed on the inside of the front cover (the Colophon/copyright page) or on the outside of the back cover. Make it easy for people to contact you for more information about the organization or the specific programs they may want to support. Ensure to include your Nation or organization's website address here and your social media handles if you have them.

Mission, Vision, Values and Purpose – Your Story
Sometimes overlooked, including your mission/vision statement is very important. It is the declaration of your Nation's purpose and driving force behind all the activities that have taken place. Your story should be prominently featured early in the annual report.

Example #1: MVVP, boilerplate, demographic data, values, vision, mission, organizational chart, infographics, departmental updates follow a template. https://cowichantribes.com/application/files/9816/0635/0142/CowichanTribes-AnnualReport-2019-20-FINAL-mobile.pdf

Letter from the Chief and CAO/Band Manager – What is the story of your nation or organization's year?
The letter(s) from the Chief and CAO/Band Manager will include high level highlights from the year. In some cases, this is a joint letter and in some cases this is separate. Developing this letter provides an excellent opportunity to spend time with the Chief and Band Manager. It is good practice to include photos of your leadership here to humanize the message.

Example #2: Check out the Sylix – annual report for innovative use of language https://www.syilx.org/wp/wp-content/uploads/2021/07/2020-2021-Okanagan-Nation-Alliance-Annual-Report.pdf

Example #3: And the Tahltan Central Government report p 8-9: https://tahltan.org/2020-annual-report/ for an infographic style presentation of annual highlights.

Departmental Reporting
This section often comprises most of the report. It provides your members a clear snapshot of program areas, their purpose, accomplishments, priorities, and future priorities. However, without proper planning, the departmental report section can be rambling and unreadable. Often, organizations will cover off their strategic goal areas and objectives in this section.

As the communicator you can help set the parameters and make this section more enjoyable for your members. Providing a template and maximum word count to department heads will result in a uniform, brief and balanced report.

The way a Nation organizes this section says a lot about your organization. Trying to make that strategy stick? Organize your report according to your strategy:

Example #4: Mandate, structure and organization.   https://lilwat.ca/wp-content/uploads/2015/03/Lilwat-Nation-AR17.pdf

Or check out this example of measurement to show members what was accomplished.

Example #5: Data visualization for departments: https://kitselas.com/wp-content/uploads/2020/12/web-Kitselas-2019-2020-Annual-Report-FINAL-12142020.pdf p. 21

Financial Data
Financials, often with graphics to make them more accessible to the reader, are the one essential element of the annual report. Because most people find numbers boring, these tallies of revenue coming into the Nation and expenses going out tend to appear toward the end, at what is referred to as the "back of the book." The name of the accounting firm responsible for the audit is always included along with the numbers. Some Nations/organizations also include the audit opinion letter within the report.

Historical Perspectives
A brief history of some aspect of your Nation's history can help put current operations into perspective. The inclusion of archival photos can add depth to your layouts.

For other examples please visit: https://fnfmb.com/en/annual-report-illustrative-examples-first-nations

Spotlight! The Human Element
Featuring staff and members throughout the report is a great way to show key publics who you are. A staff spotlight might be a 100 word write up that answers the question- What are you most proud of this year? What is one message you would share with members who are seeking to access membership, housing, health services etc?. Community member spotlights might include recent post-secondary graduates, Elder advisors, etc.

Imagery
Ideally, the images you include in your annual report can independently tell the story of your year. Captioning images with names, dates and short event descriptions will provide your more visually inclined members an opportunity to glance through the report and get a good sense of what was important to your Nation/organization in the past year.

ANNUAL REPORT DEVELOPMENT TIMELINE

Below outlines a rough timeline that you can alter for your purposes, deadlines and budget. It covers the planning, interviewing, drafting, approvals and finalization phases of developing an annual report.

Activity	Description	# weeks out
Outline the Annual Report	Outline the various sections of the report – create your "skeleton" Are you reporting against a strategic plan, an annual strategic plan? Determine your reporting framework.	12 weeks out Week 1-2
Validate your outline with your leader(s) who will finalize the report	Run your leader(s) through your proposed outline and approach, highlight moments in the timeline where you will need their feedback, schedule these meetings.	Week 2
Interview your subject matter experts (SME's) and/or distribute the departmental reporting template.	Set up interviews with department heads, program leads, send out the reporting template with a deadline	Weeks 2-4
Begin drafting content	Begin turning your interview notes or transcripts into written copy	Week4-6
Begin collecting creative content	Photos, imagery	Week 1
Engage graphic designer if you choose to use one	Share your outline, anticipated word count, creative vision Request a creative brief (clear the creative approach with your leader(s) if needed	Week 5
Validate content with subject matter experts	Have the departments review their sections and provide any changes before you share your first draft with leadership.	Week 6
FIRST DRAFT Validate first draft with your leader(s) before going to graphic design	Share your first draft of the report with the leaders responsible for signing off on the report. Seek feedback, ask- is there anything missing?	Week 7
Develop leadership covering letter, report introduction	Now that they have seen the draft, this is a good time to interview your leader(s) and work with them on drafting their covering letters	Week 7-8
Finalize content	Incorporate leadership's feedback and covering message into Draft 2	Week 8
Provide final content and images to graphic designer	Organize and catalogue your images (don't forget captions) and provide to your designer.	Week 9

Review first draft of report laid out in design	Provide notes to your designer	Week 10
Provide report to your leader(s) for review and any final inputs	Provide notes to your designer based on leadership feedback	Week 10-11
Incorporate final edits and finalize. Launch your Annual Report!	Issue a press release or newsletter article to launch the report. Post to website, order print copies.	Week 12

Budget

- Graphic Designer
    - A professional graphic designer will elevate your report into a memorable communications artifact that your leadership will share with pride. The design budget will vary based on the length and complexity of your report. Hourly rates for designers range from $50 to $125 per hour.
- Honorariums
    - Perhaps you are working with Elders or other knowledge keepers in the development of some aspect of the report. Be sure to put aside a small budget for handshakes.
- Photography
    - Consider hiring an up-and-coming photographer in your community and providing them their first paid gig. It's important to be specific about the types and quality requirements for images that you want in advance. Be sure to enter into a copyright / licensing agreement so that the images aren't posted elsewhere. The more experienced the photographer to more you will pay. Between $100-300 per image will get you a 3-year license for an image. Consider paying more for a lifetime exclusive license.
- Artist
    - You may consider including original artwork or illustrations in your annual report, this can be a good strategy to describe issues that are sensitive or difficult.
- Printing
    - While many organizations are moving to online-only publication of their annual report we know Elders and other members still enjoy a print copy. Your graphic designer will have relationships with printers and can often secure you a vendors discount. You may wish to deliver the annual report door to door and mail it to your members. Depending on the page count, complexity, and copies needed of the report you can expect to spend between $2,500 and $7,500 on printing.