Year-End Reports

Year-End reports are more than a picture of what your organization accomplished in a year, they are a marketing tool, a fundraising tool, a way to raise awareness, and a tool to leverage donations. Year-End reports do not need to be lengthy nor wordy. Here are the key points to include in your year-end report.

Cover Page

- Include a colorful cover which is well branded and accurately represents your organization.
- Be sure to include the time period covered in the report, who wrote it, and when the board of directors approved it.
- The year-end report should cover either a calendar year or a fiscal year, it should create a comprehensive financial picture of the organization.

Pages

Your goal is to create a comprehensive year-end report which shows a full picture of your organization, yet the goal is also to keep the year-end report to less than 10 pages. The following is a list of what to include:

1. List of Board of Directors for the period the report covers.
   Note who the officers are.
   If the board changes mid-year, list the changes as well.
2. Vision and mission statement.
3. Purpose Statement.
4. Goals of Organization.
5. Number of Volunteers broken down by program.
6. Fair Market Value of Volunteer hours broken down by program.
7. A full list of all in-kind donations.
8. Value of in-kind donations.
9. For each program
   a. An overview of the program, including the purpose and overall goal of the program.
   b. List the 3-5 measurable goals of each program. These goals should be the same from year to year. When possible, list the results for the previous year as well. Make sure this portion is easy to read, tables or infographics work best.
   c. Total number served.
   d. Total number of service hours.
   e. Total cost of the program.
   f. Fair Market Value of program.

10. Financial Section Balance Sheet.
   a. Profit and Loss Sheet.
   b. Your goal is to show the overall health of the organization and the ability of the board to manage a lean program.

In total, your year-end report should be no more than 10 pages long. When possible include program pictures, make it warm, inviting and easy to read. Once you develop a layout which works well for the organization, use the same layout each year.

Some organizations will include their audit as well in the year-end report. This is up to the Executive team and board. It is not a necessary piece but helps to gain trust through willingness to share information and speaks of transparency.

Always include a 1-page cover letter with the report which highlights the key points, and if any, action items.

Using this format will help you to successfully communicate vital information, build trust through transparency and increase your revenue stream.