

## Annual Report Masterclass Part One of Three



# Creating Better Nonprofit Annual Reports: Basics

Presenter: Mazarine Treyz

Author of The Wild Woman's Guide to Fundraising

Tweet today #npreports @wildwomanfund

# Poll Question 1

Have you ever worked on an annual report before?

- a) Yes, lots of times!
- b) Yes, once or twice
- c) Making my first one now
- d) Never

# Poll Question 2

Have you ever had any design training?

- a) Yes, I took a class
- b) I read a book once
- c) No training

# About the presenter



## **Mazarine Treyz**

Author of The Wild Woman's Guide to Fundraising, and an e-course on Annual Reports, as well as author and editor of many more annual reports!

She co-founded a nonprofit called the Moon Balloon Project in 2005, and has fundraised for national, international and small nonprofits.

Mazarine Treyz loves to help people write better fundraising materials and make their cause more urgent to donors




# What You'll Learn Today

- Typography and what it says about your nonprofit
- Graphic design tips to help you look like you hired a designer (even if you didn't!)
- Designing annual reports from a fundraising perspective
- What to include and what to leave out in your annual report
- Graphic design resources and inspiration

# Annual Report Typography:


## What it says about your nonprofit



**Impressive. That report really captured the essence of our nonprofit. I bet they paid a ton of money to get it created.**

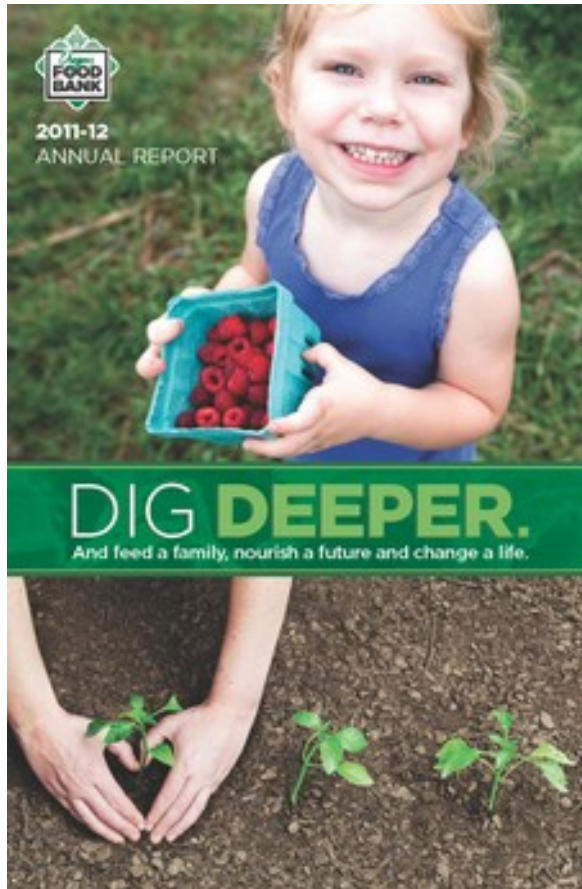


Wow.  
That looks amazing!



My child could've created this report.  
That's hideous!

# Typography Defined



OUR WORK TO SECURE MORE FRESH FRUIT, VEGETABLES, DAIRY AND MEAT — POWERED BY OUR RELATIONSHIPS WITH THE AGRICULTURAL COMMUNITY AND OFB'S GROWING FRESH ALLIANCE PROGRAM — IS ADDING TO THE NUTRITIONAL CONTENT OF THE FOOD WE DISTRIBUTE.

As we worked to meet the growing demand for emergency food, Oregon Food Bank turned to our prolific agriculture community ... and they responded. Their generosity helped us improve the nutritional quality of the food we distributed, making fresh produce 20 percent of all food distributed by OFB in FY 2011-12. In total, we received and distributed 8.8 million pounds of fresh produce — a 14 percent increase over the prior year. We also added 15 new agricultural donors, which grew our ability to reach even more of our neighbors in need.

Our Fresh Alliance program — which collects and distributes produce, milk, meat, dairy and more from local retailers — was also instrumental in helping OFB distribute healthy, perishable emergency food. In FY 2011-12, the program added 14 new retail partners, which, coupled with generous donations from our existing partners, allowed the program to distribute 9.3 million pounds of food — more than a 25 percent increase over the prior year.

# Why should you care about typography?

- 1) Readability
- 2) Professionalism
- 3) Effective Communication



# Readability

...celebrating success

## ANNUAL REPORT

Bynum School continued its tradition of success during 2013-2014 based upon student enrollment programs and services, and student progress. The Strategic Plan provided the standard for making decisions and guiding the direction of Bynum School. We believe that success is due to the oversight of the Board, management practices of an effective administrative team, generous community support parent support, and effective, dedicated staff.

Bynum School stands as unique when compared to other schools working with this population of students. Bynum School is the only school, public or private, providing an uninterrupted continuum of year-round services to students, age 3 to adulthood. Bynum School stands ready to meet the unique educational needs, social and emotional challenges and long-term vocational objectives of children, adolescents and adults with a broad spectrum of special needs including students with autism, genetic disorders and who may be diagnosed with multiple handicapping conditions. At Bynum School, we acknowledge the importance that faith plays in a program dedicated to serving children with special needs and designed to support their families. We recognize commitment to our students and families as lifelong, and we acknowledge that trusting relationships with families are critical to meeting the goals of students and the goals of Bynum School.

Bynum School has been in operation for 30 years, but our story is far from finished. Bynum School achieved a few milestones during the past school year. First, enrollment peaked at 50 students, the highest enrollment in the history of Bynum School; wait lists have been created for a few classes. Second, the Southern Association of Colleges and Schools renewed its accreditation of Bynum School, attesting to the quality of programs and administration. Third, aligned with the Strategic Plan and the objective to implement school improvement, a plan for sustained staff development was initiated. Fourth, the Board of Directors and the Capital Advance Team have made considerable progress in efforts to build new facilities. A Board of Governors has been organized. Fifth, Bynum School earned a gold rating from GuideStar Exchange based upon impact and effectiveness, financial information, and transparency. Finally, as mentioned above, Bynum School celebrated its 30<sup>th</sup> anniversary in January, 2014. Along with maintaining student programs, building a new facility is a priority. Bynum School owns property that is located on Holiday Hill Road and was donated by Linn Energy. The Capital Advance Team worked diligently over the past year to prepare a pro forma budget, to prepare marketing materials, and continues to seek a lead donation. Bynum School will be able to serve the West Texas community more effectively by accommodating additional students and by becoming even more effective with proper facilities that our students and families need and deserve.

Know that visitors are always welcome; we are proud of our students and programs. Do not hesitate to visit, call, or send an email if you have any questions or comments. Thank you for the privilege and honor of allowing us to serve your children.

William H. Maurer, Ed.D.  
Executive Director

Keri St. John, M. Ed.  
Head of School for Student Programs and Services

# Readability

## Consolidated Financial Statements\*

### Operating Revenues by Source

|                             |            |
|-----------------------------|------------|
| Government and other grants | 17,223,220 |
| Medicaid                    | 11,287,998 |
| Client rent contribution    | 4,013,079  |
| Private contributions       | 570,260    |
| Other income                | 1,589,527  |

**Total Revenue 34,684,084**

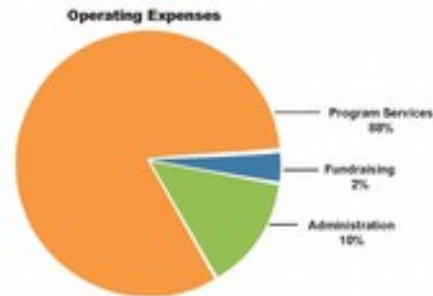


### Operating Expenses

|                        |            |
|------------------------|------------|
| Total Program Services | 30,547,544 |
| Administration         | 3,645,549  |
| Fundraising            | 416,897    |

**Total Expenses 34,609,990**

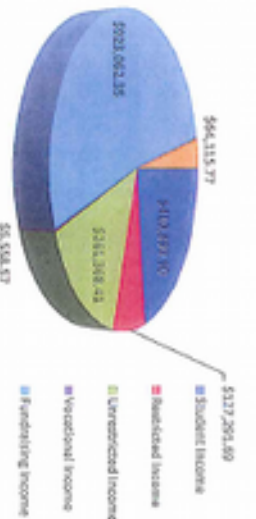
Net surplus (deficit) 74,094



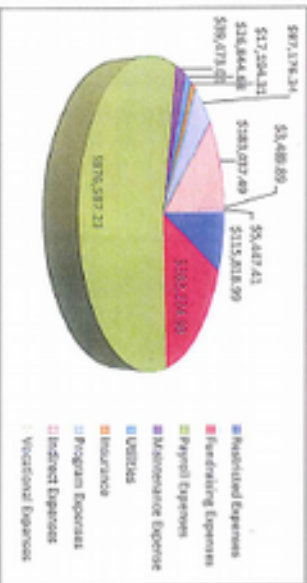
\*Unaudited

## Unaudited Financials FY 2013-2014

| Income                     |                 |
|----------------------------|-----------------|
| Student Income             | \$ 410,890.50   |
| Restricted Income          | \$ 127,291.69   |
| Unrestricted Income        | \$ 281,308.41   |
| Vocational Income          | \$ 5,558.47     |
| Fundraising Income         | \$ 923,062.35   |
| Endowment/Capital Campaign | \$ 64,115.77    |
|                            | \$ 1,792,287.19 |



| Expenses             |                 |
|----------------------|-----------------|
| Restricted Expenses  | \$ 115,818.99   |
| Fundraising Expenses | \$ 282,224.08   |
| Payroll Expenses     | \$ 876,587.23   |
| Maintenance Expense  | \$ 39,472.01    |
| Utilities            | \$ 26,894.68    |
| Insurance            | \$ 17,184.31    |
| Program Expenses     | \$ 87,216.24    |
| Indirect Expenses    | \$ 183,037.49   |
| Vocational Expenses  | \$ 3,489.89     |
| Endowment            | \$ 5,447.41     |
|                      | \$ 1,837,284.23 |



Cost per student: \$34,837.32  
Tuition Pk-12: \$8,700  
Tuition Adult Day: \$8,100



# Professionalism

Weldon Claxton- served on the Bynum School Board of Directors for over 10 years as a parent representative; served as AFT President for over 10 years; has been in charge of AFT fundraisers for over 10 years; parent of Kara, a Bynum School student for 27 years.

Lynn Lynch- recruited from the Corvette Club of the Permian Basin; served on the Board of Directors for 2 terms (6 years); served as Secretary 2 years

Laura Smith- served on the Bynum School Board of Directors for 1 term (3 years); Smash 2013 Chairperson



A HUGE THANK YOU to our corporate partners Genco Energy Services and Campbell Construction!

Tommy Holladay, manager of Genco Energy Services provides maintenance on all of our manufactured buildings and septic systems. They have been tending this task for Bynum School for 3 years. His employees have developed relationships with our students and adults. Tommy and his employees have given generously of their hearts, time and resources. Thank you so much for all you do!

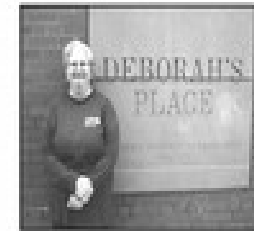
Mr. Dick Campbell, owner of Campbell Construction Company has been an amazing friend of Bynum School since the beginning. He has served on our Board of Directors and has recently agreed to serve on the Bynum School Board of Governors. His assistance in building maintenance, construction, and advice has been incredibly invaluable. We are proud to say that Campbell Construction will be the builder of our new campus!



## Breaking the Cycle of Homelessness for Women in Chicago

### Our Mission:

Deborah's Place breaks the cycle of homelessness for women in Chicago. Through a continuum of housing options, comprehensive support services and opportunities for change provided by dedicated volunteers and staff, women succeed in achieving their goals of stable housing, sustainable income and greater self-determination.



### Our Values:

- We believe in and encourage creative expression and self-determination, and we support an individual's freedom to make choices.
- We believe in building community through relationships, communication, and social commitment.
- We believe in the right to quality services delivered with respect and empathy.
- We believe in diversity that honors difference in age, culture, and social orientation.
- We believe in the right to safe, clean, affordable housing.

### Our Story:

What began in 1986 as a volunteer run emergency overnight shelter in a church gym has grown to be the largest provider of permanent supportive housing and wrap-around services for single women in Chicago.

Each year Deborah's Place helps more than 380 women overcome mental illness, chemical dependency, physical disability, unemployment, and the barriers of homelessness. We find innovative and creative solutions to help women achieve their goals through our award-winning programs and services.

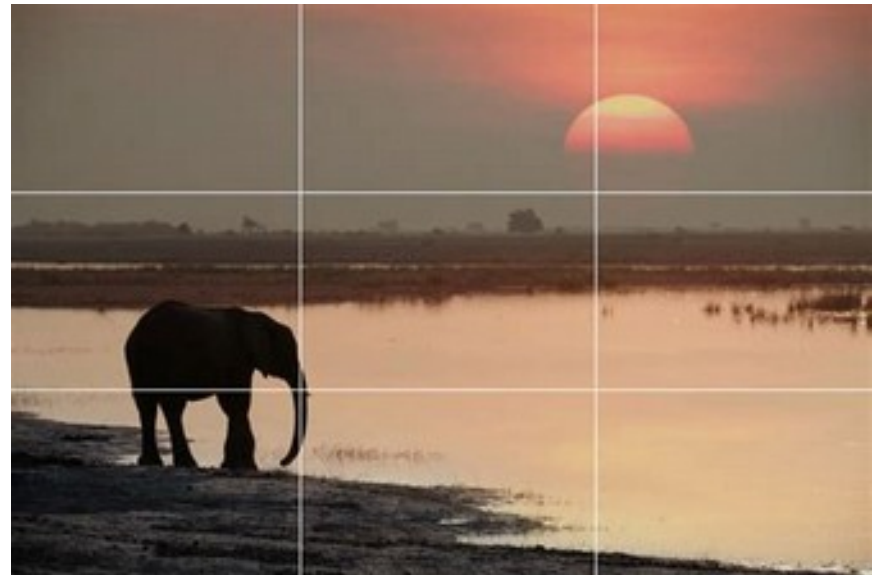
# Professionalism





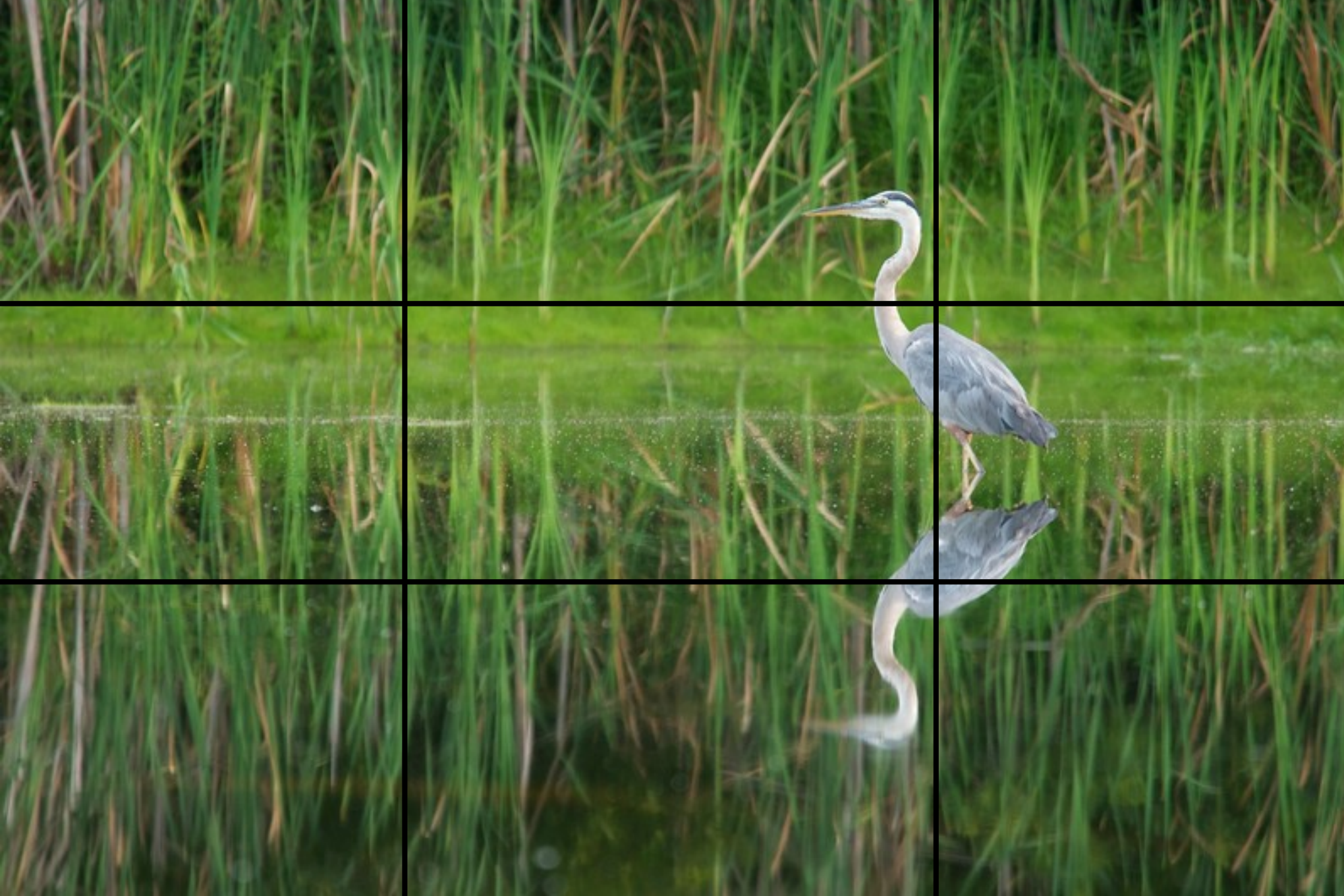
# Professionalism : The Rule of Thirds

1. Divide your image into nine equal parts by two equally spaced horizontal lines and two equally spaced vertical lines,
2. Important compositional elements should be placed along these lines or their intersections
3. Aligning a subject with these points creates more tension, energy and interest in the composition than simply centering the subject.









# Effective Communication

## GRANT-IN-AID

The Hawaii Foodbank allocated \$112,862.85 in Grant-In-Aid (GIA) funds to 54 member agencies on Oahu and Kauai. GIA funds provide financial assistance to member agencies to help purchase food for pantry distributions, feeding programs and shelter or residential meal services.

GIA funds cover Shared Maintenance Fees (SMF) on high-demand food distributed by the Foodbank on Oahu and Kauai: proteins, canned food, fresh produce, frozen food, dairy products, eggs, packaged food and rice. Currently, SMF is set at 18 cents per pound.

SMF is implemented by our national affiliate, Feeding America to help network food banks cover the cost of collecting, transporting, inspecting, storing and distributing millions of pounds of food each year. SMF ensures agencies share the cost of Foodbank food and services. SMF also gives food distributed a monetary value to help assure it is properly handled with minimum waste.

In addition to GIA, the Foodbank assists agencies by waiving fees entirely on select food distributed. Many agencies operate on limited budgets. At the same time, they must distribute food to the needy free of charge. By waiving SMF, the Foodbank helps agencies restock shelves with food so they may continue to serve the needy in their communities while realizing savings at the same time. Last year, the Foodbank distributed over 9 million pounds of food to agencies free of charge.

Mahalo to our supporters for granting GIA funds that enable Foodbank agencies to feed more people:

### OAHU

Aloha United Way Emergency and Crisis Service Fund  
Emergency Food and Shelter Program  
Hawaii Foodbank

Harry C. and Nee Chang C. Wong Foundation

### KAUAI

Emergency Food and Shelter Program  
Kauai United Way  
George P. and Ida Tenney Castle Fund  
Harry and Jeanette Weinberg Foundation

## SENIOR FARMERS MARKET NUTRITION PROGRAM

The Hawaii Foodbank, in partnership with the State Office of Community Services and the United States Department of Agriculture/Food and Nutrition Service, organized the Senior Farmers Market Nutrition Program from June through November 2013.

The goal was to provide low-income seniors with fresh fruits and vegetables, increase awareness of the benefits of healthy, well-balanced diets and stimulate Hawaii's economy through local farmers markets.

People who benefitted from this program were Hawaii residents:

- 60 years or older
- At or below 185 percent of the Federal Poverty Guidelines for Hawaii
- Disabled individuals 55 years and under

Qualified seniors and disabled persons were issued \$50 voucher booklets, answers to Frequently Asked Questions, lists of participating farmers markets and dietary guidelines



provided by the University of Hawaii College of Tropical Agriculture and Human Resources Nutrition Education for Wellness. Mahalo to our agencies for their help in certifying the elderly and disabled and providing language interpreters to explain the process throughout.

The Foodbank and partners provided 4,290 elderly and disabled with vouchers valued at \$214,500 to purchase fresh produce through the Senior Farmers Market Nutrition Program.

Recipients redeemed their vouchers for locally grown produce at certified farmers markets operated by the City and County Peoples Open Market, the Hawaii Farm Bureau Federation, Kaiser Permanente, Makeke Kapolei and Waianae Farmers. Voucher redemptions also helped stimulate the economy by supporting local farmers and farmers markets. 🌱

## THE HAWAII FOODBANK 9TH ANNUAL HUNGER WALK

August 31, 2013 – Walkers representing 55 Foodbank agencies gathered at the Mayor Frank F. Fasi Civic Center for the Hawaii Foodbank 9th Annual Hunger Walk sponsored by the Harry C. & Nee Chang C. Wong Foundation. The Hunger Walk is an annual fundraising campaign for agencies to

build financial and community support to help restock pantries with Foodbank food to feed the needy.

Agencies that raised \$200 or more had a percentage matched by the Harry C. & Nee Chang C. Wong Foundation and the Hawaii Foodbank contributing a total of \$55,000. Last year, agencies raised \$104,939.41, exceeding its goal of \$100,000.

Congratulations to these agencies in recognition of their fundraising efforts:

Top Three Fundraisers 2013

1. St. Pius X, \$12,375.00
2. Cedar Assembly of God, \$9,024.01
3. Once a Month Church, \$8,000.00

Most Participants: Church of Christ at Pearl Harbor

Most Innovative Fundraising: Private Sector

Most Improved: Kaunakapili Church

Team Spirit: Waipahu United Church of Christ - Hug Me Bears

Mahalo to all who made donations of dollars or volunteered time and effort to support their nonprofit organization of choice. Your gift will help agencies distribute over 12 million pounds of food to the needy in Hawaii this year. 🌱



Our Lady of Perpetual Help



# Effective Communication



# Design Tips

## You'll look like you hired a designer

1) You can't build a house without a blueprint.

2) Style Tile

3) Sketching isn't just for artists

4) Let's dig into the details



# Planning . . .

- 1) Allows you a test environment
- 2) Becomes a time-saver
- 3) Helps you get buy-in from your boss, colleagues, etc.

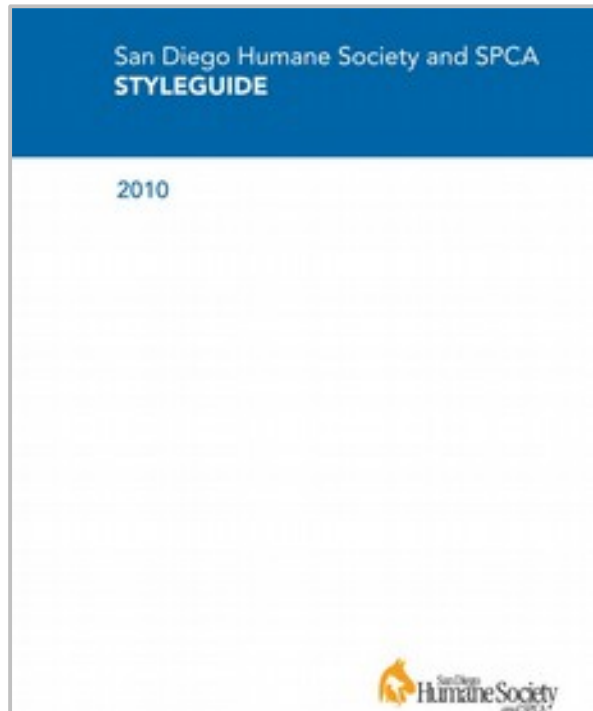


How do you plan for the design?





# 1) Are Branding/Design Guidelines already established?



## 2) Create an inventory

a) Dimensions of photos, final annual report

Five 4x6 photos

Final annual report must be one-sided

b) fonts you'll use

**Adobe Caslon Pro**   **Agenda**

c) colors



### 3) Style Tiles

Type



Colors

Patterns

Adjectives  
that  
describe the  
design style

### 3) Style Tiles



## Colors

Logo

Type

## 4) Sketching isn't just for artists



## 5) Meet with your boss often



# 1) Variety of font sizes and fonts

## Bringing People Together

**N**etworking is the art of meeting people and forming relationships. It is exchanging news on a successful program or a new funding opportunity. It is letting a friend or colleague know about a professional development course or a new state conservation initiative. Networking can be one of the most important avenues for both personal and organizational success, yet it can be hard to know when or how to start. In 2009 Friends of Chesapeake Gateways became a conduit for increased networking opportunities among the more than 140 designated Gateways and Watertrails. Friends sponsored free workshops, where site staff got to know one another while learning new skills. We began publishing "Gateway Notes and News," a monthly e-mail newsletter featuring updates on the Network and its members. We organized webinars on Chesapeake-centric web resources and created a new online networking presence for Gateways through Facebook and Twitter. The results: increased connectivity among sites, greater knowledge of the Gateways Network and its resources, and better avenues for dialogue among staff and partners.



"Gateway Notes and News" keeps Gateway members in the loop on what's happening at sites and across the network.

## Strengthening Programs

**W**hen economic times are tough, it is hard to find money in the budget for training. Yet, given the rapid shifts in technology, training in new media is absolutely essential. It is also critical to know whether your programs are effective in meeting their goals and objectives. To meet this need, Friends offered eight free workshops to Gateways staff and partners in 2009. In the spring, sessions focused on new interpretive media and its applications, tracking on Facebook, Twitter, geocaching, web development and more. In the fall, the subject was program monitoring and evaluation, with an emphasis on creating measurement tools for projects and programs as diverse as walking tours, boating ramps, oral histories and festivals. The results: better tools for evaluating programs effectiveness and increased comfort with new technologies and how to use them.



Friends hosted a workshop seminar at the Delaware Maritime Museum in December 2009.

## Using Social Media to Spread the Word

Friends uses social media tools, including Facebook and Twitter, to keep the Gateways and the public informed of events across the Chesapeake.

Follow us on Twitter: [www.twitter.com/ChesapeakeGateways](http://www.twitter.com/ChesapeakeGateways)

Follow us on Facebook: [www.facebook.com/ChesapeakeGateways](http://www.facebook.com/ChesapeakeGateways)

I thoroughly enjoyed the Program Monitoring and Evaluation Workshop. The program emphasized the importance of evaluation to help improve programming and quantify results to ensure that the mission of the organization is advanced."

Gina Tarnan  
ADULT PROGRAM COORDINATOR  
Adams Administration



In November 2009, the Marine & Dismal Barge Canal was held for an evaluation workshop for Gateways staff.

## Get Involved!

*Join a committee,  
Help at a fundraiser,  
volunteer at the school,  
collect recyclables,  
Take pictures,  
Share your Bynum  
Story.*

**Follow us on social media!**





## 2) Consistency is Key

CHILD CARE

BUILDING STRONGER SYSTEMS

The 7-year-old girl lived with her mother in a small apartment near downtown Charlotte. "Julie" did well in school, where her favorite subjects were science and math, and she helped with chores at home. When her mother had to work at night, Julie made sure her little brother got to bed on time.

But a few months after her mother's new boyfriend moved in, Julie's perfect attendance ended. She stopped doing her homework. Her grades slipped. Teachers saw their once-cheerful student become withdrawn. Authorities intervened after they discovered the boyfriend had been abusive.

A social worker had to determine the next steps. Would it be best for Julie to move in with a relative or a foster family? Maybe group care would be the best option? If there are mental health issues, could a private provider offer appropriate services?

For the past two years, a unique workgroup in North Carolina grappled with those kinds of questions. The participants — from public agencies, private providers and The Duke Endowment — came together to learn from each other, identify common values and work toward improved outcomes for the thousands of children who enter the foster care system each year.

The DSS/Private Provider Quality Workgroup focused on developing a tool to help county social services departments define "quality" among private providers. The group also worked to create a standard tool to help identify the best placement level for children needing care.

The Endowment participated in a similar effort in South Carolina. With representatives from the South Carolina Department of Social Services and select private providers, the group worked to increase understanding about the way they operate within the system. Discussions looked at placement stability, assessment tools, funding issues and foster parent recruitment. Participants reviewed other states' approaches and analyzed service gaps to pinpoint areas of critical need.

A significant point of agreement emerged: DSS officials, responding to national mandates, seek to place more children in family settings. Private providers, meanwhile, were willing to expand their services beyond traditional group care by recruiting new foster care families, offering in-home support and participating in family group conferencing.



JAMES B. DUKE, JR.  
CURRENT TOP GROW, CHILD CARE

GRETTY M. SHADY  
VISA, PRESIDENT

WATCH A VIDEO



Shirley Harty discussed the Endowment's history and current focus in supporting children in North Carolina and South Carolina.

THE DUKE ENDOWMENT 1

HIGHER EDUCATION

EXPLORING SUSTAINABLE PRACTICES

When James B. Duke wrote the indenture of the Trust that created The Duke Endowment, he included four institutions of higher education as beneficiaries.

The schools — Davidson College, Duke University and Johnson C. Smith University in North Carolina and Furman University in South Carolina — have unique cultures and priorities. In the past few years, however, they've worked together on a shared commitment to environmental sustainability.

The Task Force on Campus Sustainability began in 2008 when the Endowment awarded a grant to the four institutions as a whole. Teams from each school — including top-level administrators, faculty and staff — began working together during workshops and campus visits.

By exploring ways to reduce their carbon footprint, the schools are hoping to cut long-term energy costs and meet current needs without sacrificing the needs of future generations. They're also working to provide sustainability-related coursework and learning opportunities for students.

Anthony Cortese, president of Second Nature and co-organizer of the American College & University Presidents' Climate Commitment, calls the collaboration "a model" for the country.

"The idea of people within a local region working together, and then working with the communities they are part of, creates the opportunity for synergy in ways that would not and could not happen if the schools were just doing it alone," Cortese says. "All the schools are going to have different expertise — and the ability to share resources and learn from each other is enormous."

The sustainability initiative has already generated ideas for conserving energy and securing federal- and state-funded grants. By exploring carbon offset programs at the local level, Duke University has partnered with Duke Energy to develop a pilot project for capturing methane from commercial hog farms. And thanks to energy audits, Davidson, Johnson C. Smith and Furman have begun acting on 20 recommendations for improved efficiency.

In 2010, task force members began visiting each school to learn about campus sustainability programs and discover ways to advance their own efforts. At Davidson, for example, they heard about a composting system that uses technology to reduce paper use, and they explored a composting project that turns dining hall scraps into mulch.

"Each gathering has been strategically clarifying for me," says David Holthouser, the facilities director at Davidson. "When we visit each other's campuses, it helps me solve some of the riddles of detail that were barriers for moving forward."



JAMES B. DUKE, JR.  
CURRENT TOP GROW, HIGHER EDUCATION

GRETTY M. SHADY, VISA, PRESIDENT

WATCH A VIDEO



Shirley Harty discussed the Endowment's history and work in advancing higher education.

THE DUKE ENDOWMENT 2



### 3) Whitespace and Margins are your friends

*Through collaborative partnerships, we nurture a culture of service and develop the next generation of community leaders.*



#### SERVE

People are passionate about many things. Those passions often direct us towards finding our particular purpose — our place we want to be involved in the community. For the Volunteer Center, service is about more than just volunteering. It's about discovering your personal passion and purpose and then putting that purpose into action.



#### BUILD

The success of a community will be defined by its next generations. At the Volunteer Center, we believe it is our responsibility to help build a next generation of leaders who are engaged within their community and who know how to use their personal strengths and talents to benefit those around them, in their workplace, in their neighborhood, and every area of their lives.



#### COLLABORATE

A thriving community is a collaborative one — a community in which everyone is coming together to meet individual and corporate needs. The Volunteer Center exists to be a hub for collaboration between for profits, nonprofits, schools, individuals, and organizations of all types.



#### Ontario

Margaret Kelch, Chair  
Rolph A. Davis, PhD, Vice-Chair  
Martin Abell  
Brian Barkley  
Michael Biro  
Nancy G. Dengler  
Ted Ecclestone  
Joel Finlayson  
Gary Goldberg  
Stephen Griggs  
Tom Hilditch  
Sandra Lawn  
Catherine Lyons  
Judith M. Rodger  
Chris Snyder  
Benjamin Trister  
David Warren  
Richard Yank

#### Manitoba

James A. Richardson, Chair  
Kim Bassey  
Sheldon Bowles  
James E. Downey

#### James Fields

Mary Kate Harvie  
Jake MacDonald  
Donald MacKenzie  
Michael Paterson, PhD  
Merlin Shoesmith, PhD  
Christine Snodgrass  
Robert Wrigley, PhD

#### Saskatchewan

Brian Scherman, QC, Chair  
Ann Phillips, QC  
Bob Eisner  
Candace Savage  
Diane Secoy-Smith, PhD  
John Dipple  
Kevin Murphy  
Lorne Scott, C.M.  
Ryan Brook, PhD

#### Alberta

Bill Friley, Chair  
Pierre Alvarez, Vice-Chair  
Tim Bancroft  
Susan Church

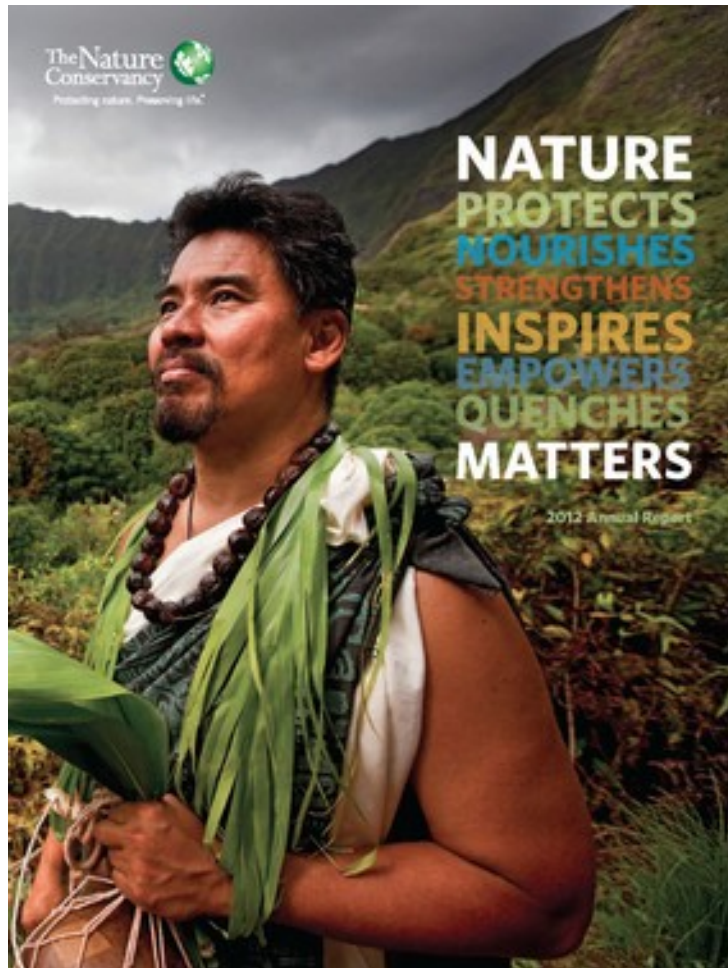
#### Ken Crutchfield, GOA

Advisor  
Don Dabbs  
Lorne Fitch  
Ian Griffin  
Jamie Mackie  
Chris Mills  
Esther Ondrack  
Ron Reardon  
Barney Reeves  
Ray Woods

#### British Columbia

Douglas Hayhurst, Chair  
Daniel Burns, Co-Vice Chair  
Kevin McBurney, Co-Vice Chair  
David Brackett  
Richard Cannings  
Garth Sheane  
Gary Ley  
Greg Deck  
Joan Sawicki  
John Bunting  
Larry Tapp  
Nancy Wilkin

#### 4) A picture is worth a \$1,000 for your nonprofit



# Designing annual reports from a fundraising perspective

How can an annual report help you fundraise?

It provides:

- 1) Donor recognition
- 2) Stories from programs (helping donors insert themselves into your narrative)
- 3) Programmatic Transparency
- 4) Financial Transparency

# Donor recognition



The screenshot shows the Vinland National Center website. The header includes the logo, navigation links (Contact Us, Request a Brochure, Take a Tour, Join Our Mailing List, Building), and a main menu (Home, About Us, Our Programs, Client Stories, Admissions). The 'About Us' section is active, displaying a sidebar with links like 'Where Donations Go', 'Annual Report 2011', 'Brief History', 'Board of Directors', 'Staff', 'News', 'Locations', and 'Contact Us'. The main content area features the '2011 Annual Report' with tabs for 'Program Highlights', 'Donor List', 'Clients Served', and 'Financials'. The 'Donor List' tab is selected, showing a thank-you message and a list of donors.

**VINLAND**  
NATIONAL CENTER

Contact Us | Request a Brochure | Take a Tour | Join Our Mailing List | Building

Home | About Us | Our Programs | Client Stories | Admissions

**About Us**

- Where Donations Go
  - ▶ Annual Report 2011
- Brief History
- Board of Directors
- Staff
- News
- Locations
- Contact Us

**2011 Annual Report**

Program Highlights | Donor List | Clients Served

**Financials**

Thank you to everyone who made a donation during fiscal year 2011!  
Your support and generosity makes our work possible.

21st Century Bank - Loretto  
Access Press  
Jeffrey Agnes  
Sara Aho  
Lisa Albrecht  
Benjamin Alford  
Rose Allen  
Gordon Anderson  
Marvyn Anderson



# Donor recognition

People like me!

## OUR DONORS



"Muskoka Bear Wear is an Ontario-made clothing company that partnered with SickKids in 2014. Inspired by the remarkable work taking place at the Hospital, we just launched our new donation initiative: Socks For SickKids! We designed an exclusive pair of socks in custom SickKids colours, and will direct all proceeds towards The Great Camp Adventure Walk in support of SickKids as we strive to make a difference. We're so proud to be partnered with such a great Foundation."

– Kevin Saunders, Owner, Muskoka Bear Wear

*Photo: Brittany, at Muskoka Bear Wear flagship store in Bracebridge*



# Donor recognition

## Why I give section:



### AN 1,800 MILE JOURNEY TO AHS

Eleven-year-old Sarah Palmer has loved animals all of her life. Seeing the pure joy they bring to Sarah was enough for her mother, Sandra, to encourage her to watch Animal Planet. Little did she know that Sarah would encounter *Animal Copz Phoenix*, an animal welfare reality show highlighting AHS' Emergency Animal Medical Technicians™, who investigate cases of animal cruelty, rescue sick and abused animals and fight for justice on their behalf. Although concerned at first, Sandra felt it provided her daughter with some important life lessons.

As Sarah became even more engrossed in the Arizona Humane Society, she discovered AHS' Camp Compassion and pleaded with her parents to let her attend, despite being 1,800 miles away! Soon enough, Sarah found herself in Phoenix meeting her EAMT™ heroes. Of course she did what any fan would do... and thanked them with a big bag of LifeSaver®. She also came away with some important advice for people of all ages: "Treat your animal like a friend. You need to take responsibility for them." We couldn't have said it better ourselves, Sarah!

### WHY WE GIVE



*My wife, Myndi, and I have been long-time supporters of AHS, and I consider it an honor to serve on AHS' Board of Directors. We passionately believe in the mission AHS serves: to improve the lives of companion animals in our community. I have witnessed many of the heartbreaks, and many more of the miracles, that occur at AHS, and I admire the staff and volunteers who make an important difference in the lives of thousands of animals (and families) each year.*

*- Bob Kort, 2011 Chairman of the Board*

### WHY I GIVE



*When I started volunteering with AHS, I knew that I wanted to make a difference in the life of a homeless animal. What I didn't know was that I'd meet so many wonderful people who I would eventually call my second family. So even though I've raised much-needed funds and awareness for AHS through Project 121, I feel like I'm the one who is truly blessed. Being a part of AHS has forever changed my life, and I look forward to many more years of helping the animals.*

*- Kelli Roseberry, Project 121 Action for Animals Team Captain and AHS Volunteer*



### PROJECT 121: ACTION FOR ANIMALS

Imagine turning away 121 animals a day. We can't. We won't. Hence the introduction of Project 121: Action for Animals. Project 121 is the Arizona Humane Society's six-week community engagement and fundraising initiative devoted to the average number of animals that AHS takes in each day, 121.

As a nonprofit organization that receives no government funding, it is a monumental task to provide ongoing medical, rehabilitative, shelter and adoptive services for 121 new arrivals daily. Arrivals such as Scarlet, AHS EAMT's™ first-ever puppy/car engine rescue and Honey, a cat whose eye had to be removed following a scuffle were inspiration behind the campaign. Scarlet and Honey became two of the six faces of Project 121; their stories of survival gave life to the innovative campaign which also

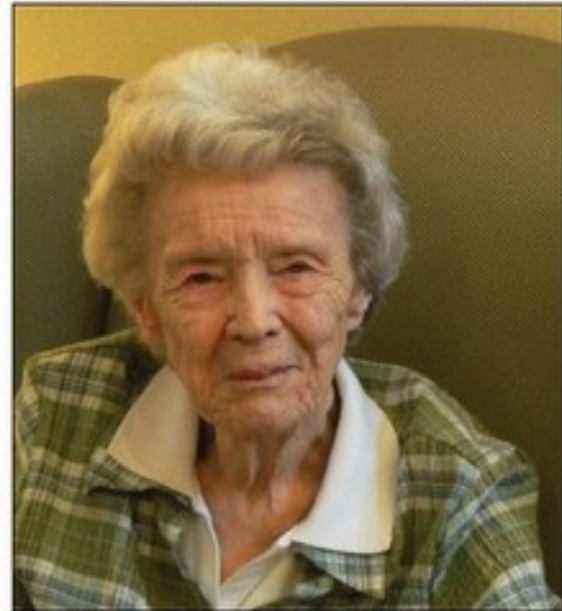
included the state's first-ever animal welfare light rail wrap, a kick-off rally for the 80 online fundraising team captains and a point of sale partnership, all of which culminated at AHS' 13<sup>th</sup> annual, 129-minute live Pet Telethon broadcast from AHS' Nina Mason Pulliam Campus for Compassion on JTV.

# Donor recognition

People like me, plus why I give:

"Some years ago I read about a piece of undeveloped property that was for sale in rural Manitoba and I thought how much I would like to buy it and just keep it that way. Some time later I found out that is what NCC does. I support NCC because nature is the closest thing to my heart."

**Mabel Hykaway,**  
*Leader in Conservation  
in the Manitoba Region*



# Stories from Programs

Helping  
themselves  
your way

## HOMESCHOOL HELP

Chicago Public Library is home to the largest and most comprehensive homework help program in the country. As part of this program, our 60 dedicated, accredited local educators—the Teachers in the Library—provide one-on-one afterschool sessions to thousands of students every year. Students of all ages can also access a live bilingual tutor online seven days a week with their CPL card!

“REGARDLESS  
OF GRADE  
LEVEL, WE CAN  
SIMPLY FOCUS  
ON GROWTH,  
FINDING SMALL  
VICTORIES ON A  
DAILY BASIS.”

— Joseph D., Teacher  
in the Library



*The program “not only provides essential academic support to children and their families, but also provides the one-on-one attention around learning that many children simply do not receive at school or at home and that is critical to success.”*

— Urban Libraries Council





# Stories from Programs

The story of one person:

## CYBERNAVIGATOR

CyberNavigators (CNs) are trained to provide more than 100,000 computer tutoring sessions each year to adult learners seeking to master computer, email, and Internet basics, including online job searches and applications. One-on-one sessions and classes are strengthened by Chicago DigitalLearn, an interactive online curriculum developed by the Library especially for new computer users.

“A PATRON WHO I HAVE BEEN HELPING APPLY FOR JOBS FOR ABOUT A MONTH CAME IN AND TOLD ME THAT HE GOT HIRED AT HIS DREAM JOB. HE WAS ABSOLUTELY EXCITED TO START WORKING AS A FLIGHT ATTENDANT.”

- Adina C., CyberNavigator

*“I want to thank all the CPL CyberNavigators who have helped me learn and increase my computer skills this past year.... They have helped my computer learning experience while allowing me to maintain my self-esteem as a senior. The digital world can be a challenge to many of us while we try to stay current with the new technology.”*

- Pedro R., Library patron



119,168

COMPUTER  
INSTRUCTION  
SESSIONS PROVIDED

20%

OF SESSIONS WERE  
JOB-SEARCH RELATED  
- A 23% INCREASE  
SINCE 2015

NEARLY  
1,000



LEARNERS SELF-  
REPORTED SECURING  
A JOB AS A RESULT  
OF A CN'S SUPPORT



CHICAGO  
DIGITAL-  
LEARN  
MODULES

CHECK THEM OUT AT  
[chipublib.digitallearn.org](http://chipublib.digitallearn.org)

# Stories from Programs

The story of one person:



# Programmatic Transparency

## **#1 reason major donors give:**

If the organization has a track record of producing measurable results.



# Programmatic Transparency

With  
infographics

## The Pathways Model

Pathways to Housing is widely credited as the originator of the revolutionary Housing First model of addressing homelessness among people with mental health challenges. The Pathways Housing First model is simple: provide housing first, and then combine that housing with supportive treatment services in the areas of mental and physical health, substance abuse, education, and employment to facilitate recovery and integration into the community.

Since its founding Pathways has housed over 3,000 people and had enormous success in keeping them housed. Over the past 20 years, housing retention rates have remained at 85-90%, even among individuals who have not succeeded in other programs. But the greatest benefits go far beyond housing, to recovery and transformation. Individuals who once bounced between hospitals, shelters, jail and the streets now have the support and stability of a home to transform their lives.

Not only is Housing First effective at keeping people housed and moving toward recovery, it is proven to be incredibly cost effective. Research shows that the cost of providing a home and support services to someone who is homeless and mentally ill is significantly less than the expense of cycling in and out of emergency rooms, shelters, psychiatric hospitals and jails. Pathways to Housing provides the dignity of a home, and so much more, at a fraction of the cost of the alternatives.



\* NYC Mayor's Report 2003 [http://www.nyc.gov/html/oped/downloads/pdf/inter09020902\\_nmr.pdf](http://www.nyc.gov/html/oped/downloads/pdf/inter09020902_nmr.pdf)

\*\* NRE, Inc. Revenue and Expenditure Reports [http://www.nre-inc.org/projects/Profiles/Price\\_R05.htm](http://www.nre-inc.org/projects/Profiles/Price_R05.htm)

\*\*\* Corporation for Supportive Housing [http://documents.csh.org/documents/pubs/full\\_new\\_beginnings.pdf](http://documents.csh.org/documents/pubs/full_new_beginnings.pdf)



# Programmatic Transparency

## VOLUNTEER TIME & TALENT



Recognizing the overwhelming need in our communities, our volunteers stepped up and contributed

**142,000**  
HOURS OF SERVICE

to OFB — a 23 percent increase over the prior year and the equivalent of

**74 FULL-TIME POSITIONS**

with an estimated value of \$2.4 million.

Page 10

### Board of Directors

Mike Wells, President  
The Clackamas Group

David Wood, Treasurer  
Northwest Health Foundation

Leslie T. Schockert, Secretary  
Community Volunteers

Nancy Barr  
Community Volunteers

James Chandler  
JPC Structural

Marcus Frank  
Community Volunteers

Shannon Kinetic  
Clackamas County District Attorney's Office

Karen Murry  
Clackamas County Community Corrections

Jon Shook  
James L. Shook, CPA, P.C.

### Leadership Council

Ruth Evans, Managing Partner  
Steel River Portland, Oregon

David Chevallier, President/CEO  
Lester Seals Oregon

David Dickson, VP Development  
Marylhurst University

Edison Drake, Vice President  
P.C. Structural

John Fouts, District Attorney  
Clackamas County

Darlene Hoadley, US House of Representatives  
United States Congress

Kendra McKeown, Executive Vice President  
West Coast Bank

Craig Roberts, Sheriff  
Clackamas County

Martha Schrader, Commissioner  
Clackamas County

Bill Swindells, President  
WRS Investments

Joe Wickham Taylor, President  
Buckley LeChevallier P.C.

Nancy Wilgenbrock, Ph.D., President  
Marylhurst University

### Clackamas Women's Services Statistics

from July 1, 2005 to June 30, 2006.

#### Women/Children Sheltered

|                          |      |
|--------------------------|------|
| Total Women Sheltered    | 202  |
| Total Children Sheltered | 183  |
| Total adult bed nights   | 3616 |
| Total child bed nights   | 1338 |

#### Seeking Shelter, no room

|          |     |
|----------|-----|
| Women    | 802 |
| Children | 612 |

#### Crisis Line Calls

|  |      |
|--|------|
|  | 2991 |
|--|------|

#### Non-sheltered Survivors Served

|          |      |
|----------|------|
| Women    | 3048 |
| Teen     | 56   |
| Children | 255  |

#### Number of Services Provided

|                                  |      |
|----------------------------------|------|
| In-person crisis response        | 4431 |
| Support Group attendees          | 421  |
| In-person information & referral | 1802 |
| Phone information & referral     | 1228 |
| In-person follow-up services     | 1624 |
| Legal/Court Advocacy             | 719  |

#### Speaking Engagements

|  |      |
|--|------|
| Persons attending speaking engagements | 1980 |
|--|------|

#### Volunteer Hours

1384

#### Demographics (Adults only)

|                                  |     |
|----------------------------------|-----|
| Asian/SE Asian                   | 2%  |
| Black/African American           | 14% |
| White/European Descent           | 58% |
| Am. Indian/Alaskan Native        | 4%  |
| Native Hawaiian/Pacific Islander | 2%  |
| Hispanic/Latina                  | 17% |
| Multi Cultural/Racial            | 3%  |

#### Under 21

|       |     |
|-------|-----|
| 21-30 | 4%  |
| 31-45 | 34% |
| 46-55 | 47% |
| 56-65 | 10% |
| 66-75 | 4%  |

# Programmatic Transparency

1983

0.42M

MEALS SERVED

## \$1 BILLION FOR WORKING NEW YORKERS

"With potentially sweeping funding cuts for emergency food resources and related programs, New Yorkers are facing uncertain times that are reminiscent of when we founded Food Bank 34 years ago. It's more important than ever to recognize that Food Bank's services are a vital part of the solution, particularly during this volatile political climate."

**Kathy Goldman**

HUNGER ADVOCATE AND CO-FOUNDER,  
FOOD BANK FOR NEW YORK CITY



Food Bank understands that the reality of poverty cannot be remedied by food alone. Twenty percent of New York City residents live below the poverty line. Low-income New Yorkers often have multiple jobs, go to school, and still must choose between putting food on the table and other essentials like utilities or medical care. This is why Food Bank opened its Tax and Financial Services Center and embedded its free tax assistance services in more than 100 sites citywide last year—a strategic move that capitalizes on new technology that connects trained volunteer tax preparers with the city's most needy communities.

Getting money back into the pockets of New Yorkers who need it most is another piece of the complex puzzle of hunger that Food Bank is determined to solve. And that solution includes our historic effort in helping eligible New Yorkers receive \$1 billion in tax refunds since the program's inception.

Food Bank now also serves families at their children's schools, with on-site food pantries, SNAP screenings, tax services, financial coaching, and more. As the driving force behind the New York City SNAP Task Force, Food Bank leads the way for more than 200 advocates and experts who analyze policies, trends, barriers and successes on both a local and national scale.

2002

\$4.4M

SAVED FOR NEW YORKERS



2016

\$129M

SAVED FOR NEW YORKERS



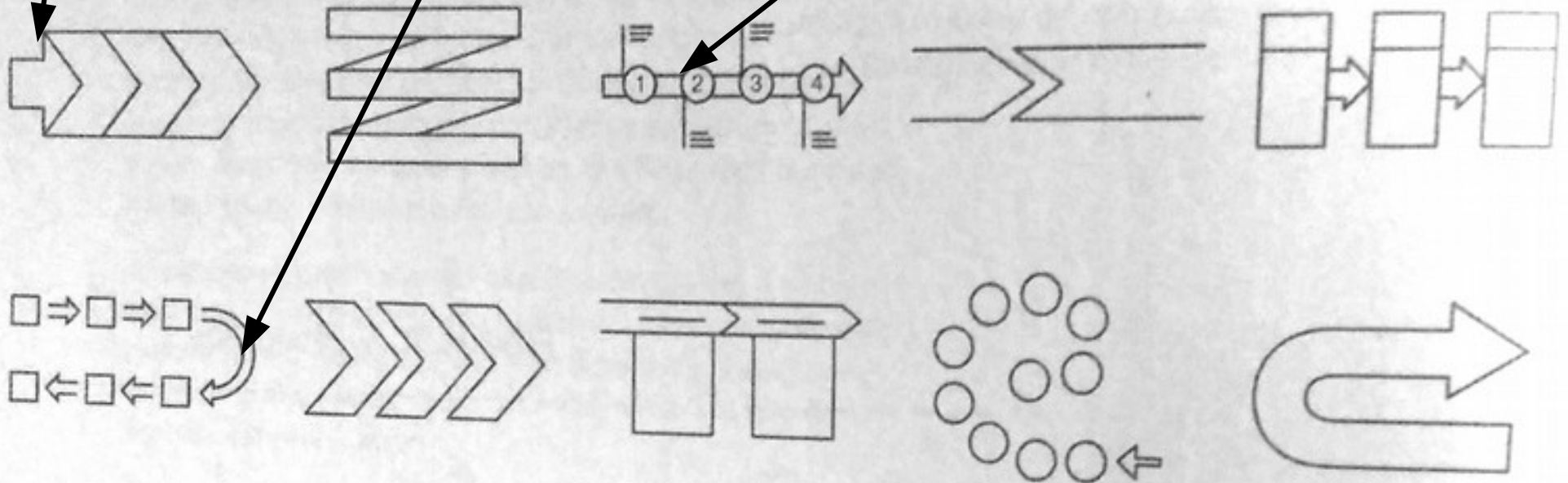
# Programmatic Transparency

Here are some linear diagrams showing the FLOW. You can visualize your

A) Capital campaign this way- or

B) The flow of people through your programs, or a timeline of your accomplishments

C) The lifecycle of a recycled material in your facility.



# Financial Transparency



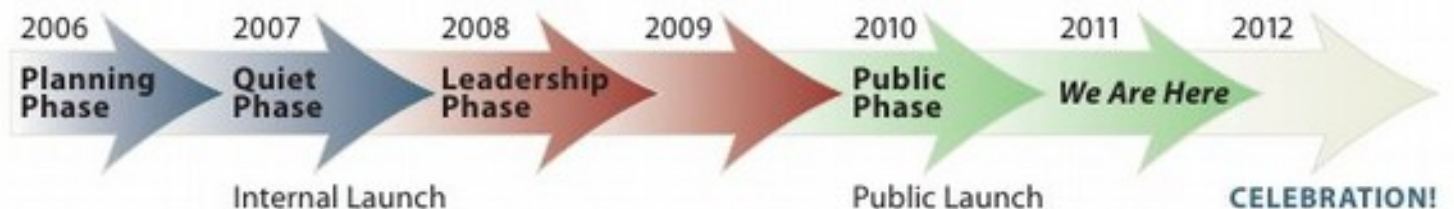
## More than halfway there

We are well on our way to success. In 2007, the Government of Canada, through the Natural Areas Conservation Program, set aside \$225 million for the protection of natural areas. Under the program \$185 million was directly invested in NCC's conservation program. This investment has provided an impressive kick-start to the Force for Nature campaign, and NCC has pledged to more than match it with private funds

## A FORCE FOR NATURE CAMPAIGN OVERVIEW (2009-2010)

## The forces for nature are gathering

NCC is currently in the midst of our five-year (2007-2012) Force for Nature campaign with a goal to raise \$500 million and to ensure that 500,000 acres (200,000 hectares) of ecologically significant land will be protected and managed in perpetuity. It is our most ambitious undertaking to date in support of conservation across Canada.

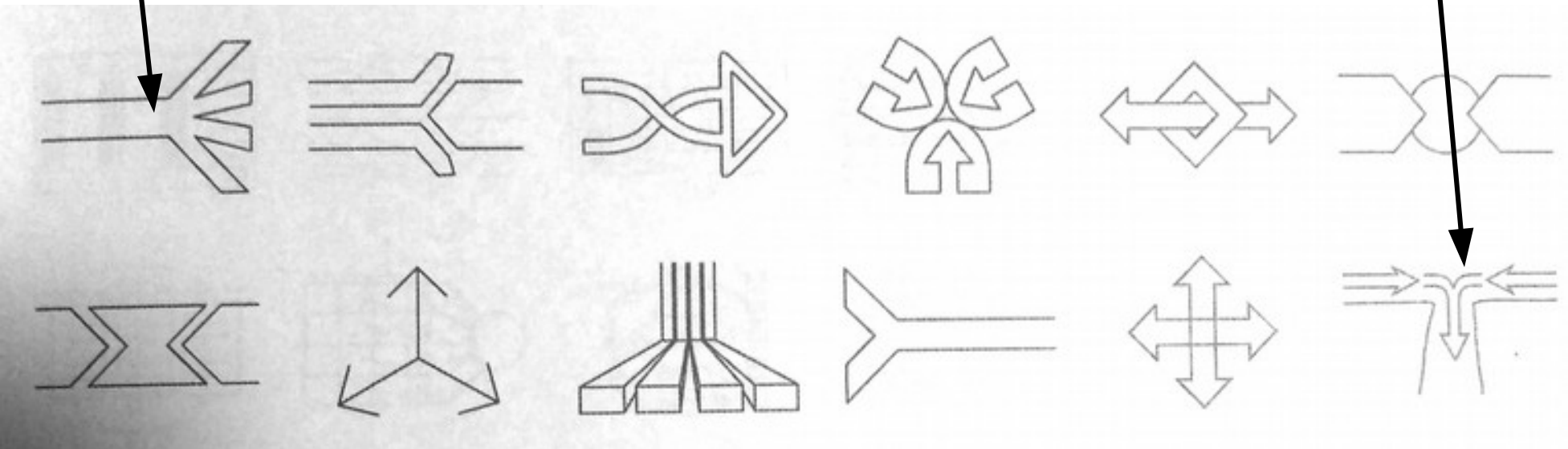


# Programmatic Transparency

Divergent and Convergent- Flow occurs when two or more elements collide or separate from each other.

If your education pipeline splits off into different outcomes, you could visualize it this way

If your program processes waste from different sources, you could visualize it this way



# Financial Transparency

What's better than this common pie chart?

## Financials

| PUBLIC SUPPORT                        | UNRESTRICTED  | TEMPORARILY RESTRICTED | PERMANENTLY RESTRICTED | TOTAL         |
|---------------------------------------|---------------|------------------------|------------------------|---------------|
| Grants                                | \$ 485,000    |                        |                        | \$ 485,000    |
| USG/In-Kind/Other fees                | \$ 270,000    |                        |                        | \$ 270,000    |
| Donated/Third-Party                   | \$ 28,000,000 |                        |                        | \$ 28,000,000 |
| Contributions                         | \$ 4,884,804  | \$ 88,800              | \$ --                  | \$ 4,973,604  |
| Net assets released from restrictions | \$ 230,000    | \$ 120,000             | \$ --                  | \$ 350,000    |
| Total public support                  | \$ 34,869,804 | \$ 208,800             | \$ --                  | \$ 35,078,604 |

## REVENUE, GAINS & LOSSES

|   |               |            |          |               |
|---|---------------|------------|----------|---------------|
| Donorware program, net                            | \$ 47,900     |            |          | \$ 47,900     |
| Shared infrastructure                             | \$ 300,000    |            |          | \$ 300,000    |
| Participating events, net                         | \$ 200,000    |            |          | \$ 200,000    |
| Subscriptions fees                                | \$ 200,000    |            |          | \$ 200,000    |
| Freight income                                    | \$ 44,000     |            |          | \$ 44,000     |
| Endowment income                                  | \$ 200,000    |            |          | \$ 200,000    |
| Net appreciation of investments                   | \$ 30,000     |            |          | \$ 30,000     |
| Change in interest in net assets of the endowment | \$ 10,000     | \$ --      | \$ 2,000 | \$ 12,000     |
| Miscellaneous                                     | \$ 44,000     |            |          | \$ 44,000     |
| Total revenue, gains & losses                     | \$ 1,800,000  | \$ --      | \$ 2,000 | \$ 1,802,000  |
| Total public support, revenue, gains & losses     | \$ 36,669,804 | \$ 208,800 | \$ 2,000 | \$ 37,080,604 |

## EXPENSES

|                                 |               |            |            |               |
|---------------------------------|---------------|------------|------------|---------------|
| Program services                | \$ 34,000,000 |            |            | \$ 34,000,000 |
| Fundraising expenses            | \$ 1,000,000  |            |            | \$ 1,000,000  |
| Management and general expenses | \$ 500,000    |            |            | \$ 500,000    |
| Total expenses                  | \$ 35,500,000 | \$ --      | \$ --      | \$ 35,500,000 |
| Change in net assets            | \$ 150,000    | \$ 188,800 | \$ 2,000   | \$ 340,800    |
| Net assets, beginning of year   | \$ 10,000,000 | \$ 100,000 | \$ 100,000 | \$ 10,200,000 |
| Net assets, end of year         | \$ 10,150,000 | \$ 288,800 | \$ 102,000 | \$ 10,540,800 |

Wash-Carex Hospital-Endowment, Inc. and affiliate statement of activities for the year ended December 31, 2019.



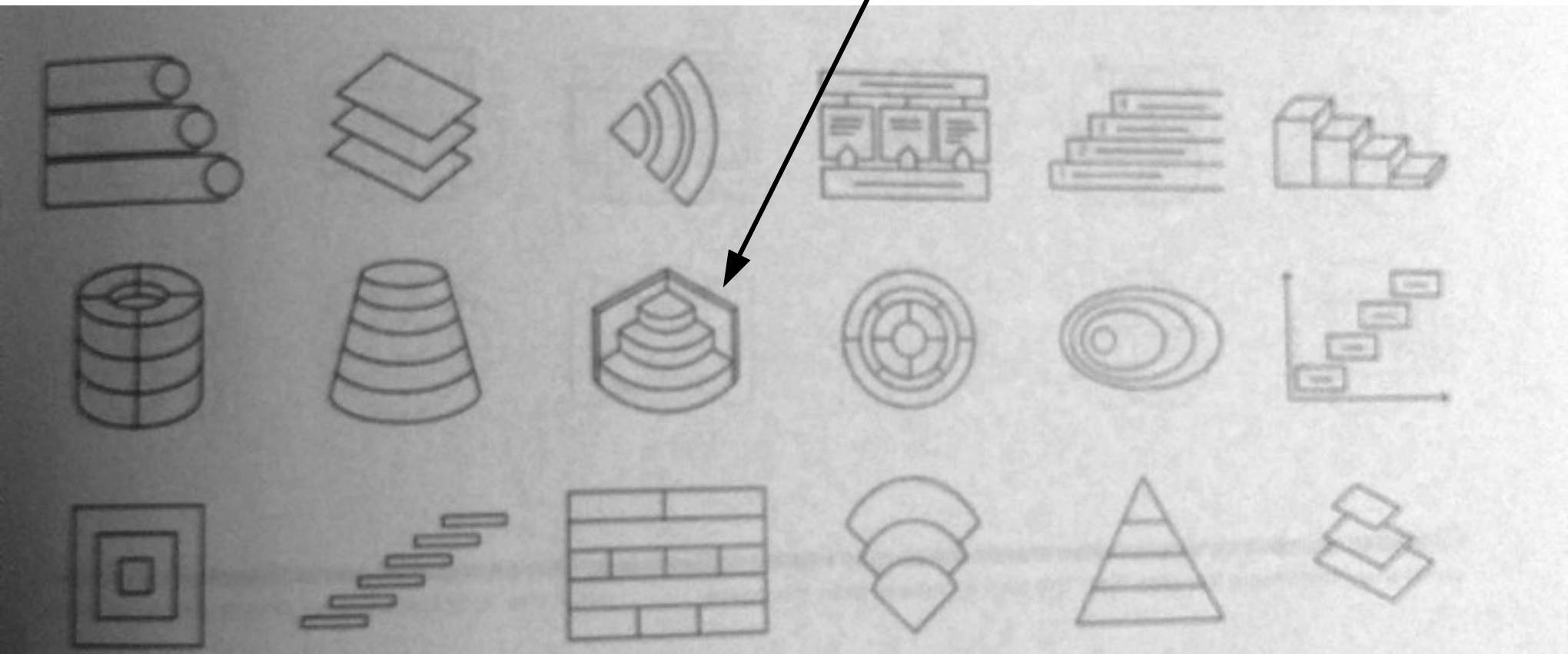


# Financial Transparency

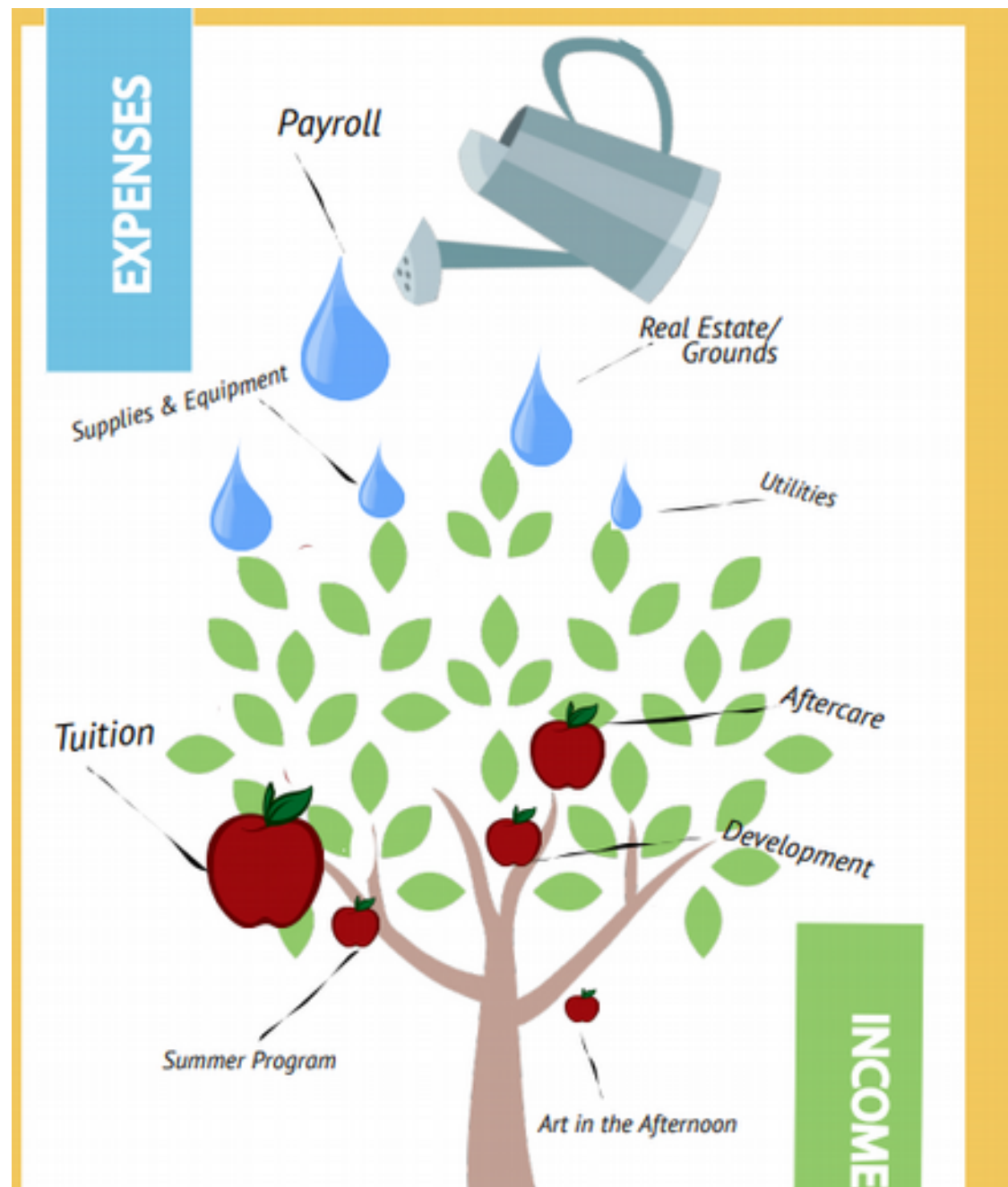


# Financial Transparency

These visualizations show layers, elements that stack and build on each other. You could show your financials this way, to show what most money goes to, or how one program's funding builds on another.



# Financial Transparency



# Graphic design resources and inspiration



Pinterest is actually really good for this

Old Polish  
movie poster





# Cover design inspiration



Inspiration for food/hunger nonprofit



Inspiration for empowerment  
nonprofit-helping people graduate,  
succeed

# Cover design inspiration



Inspiration for environmental nonprofit-  
show what happens when you are not  
there- dead tree branches vs leaves

# Cover design inspiration



Inspiration for sports nonprofit-could this be fun?



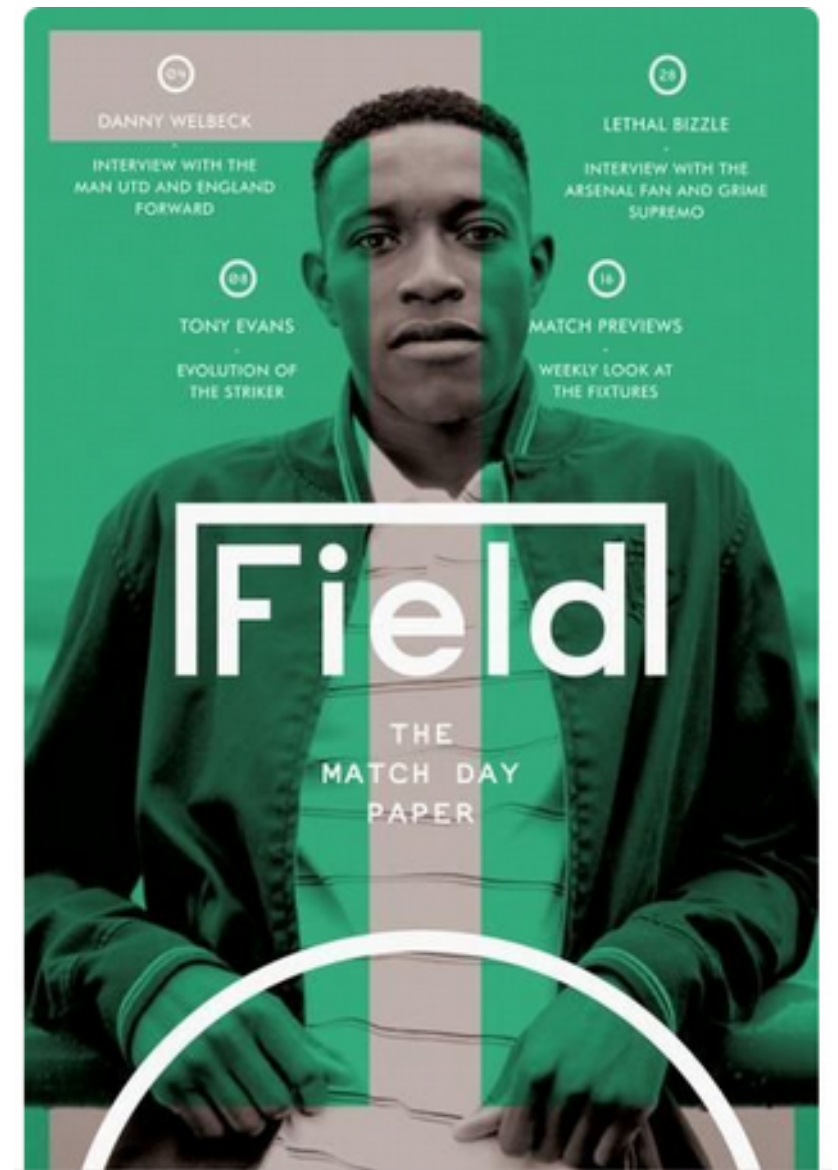
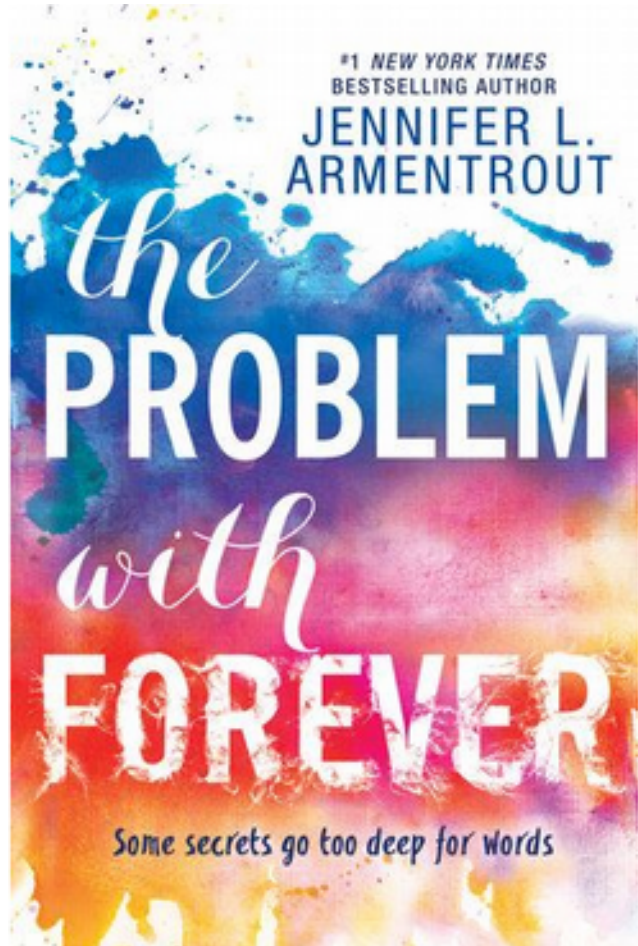


# Cover design inspiration





# Cover design inspiration



No picture of programs? No problem! Do something fun with the typography  
What about color blocking?

# Cover design inspiration

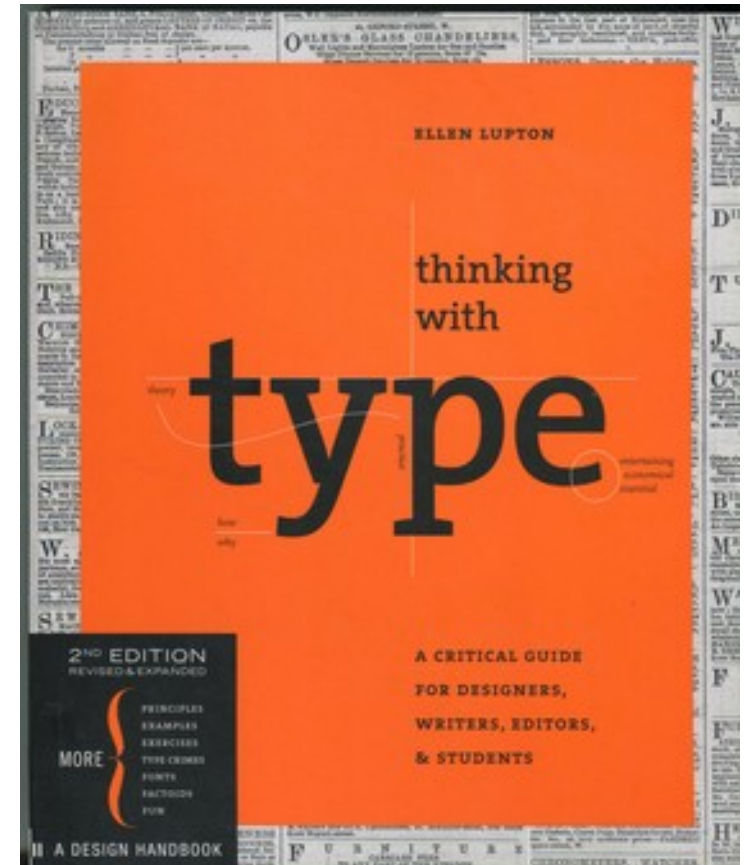


Inspiration for literary nonprofit-drawings or highlighter pen-show how words matter

# Graphic design resources

Thinking with Type (book & website)

[www.thinkingwithtype.com](http://www.thinkingwithtype.com)



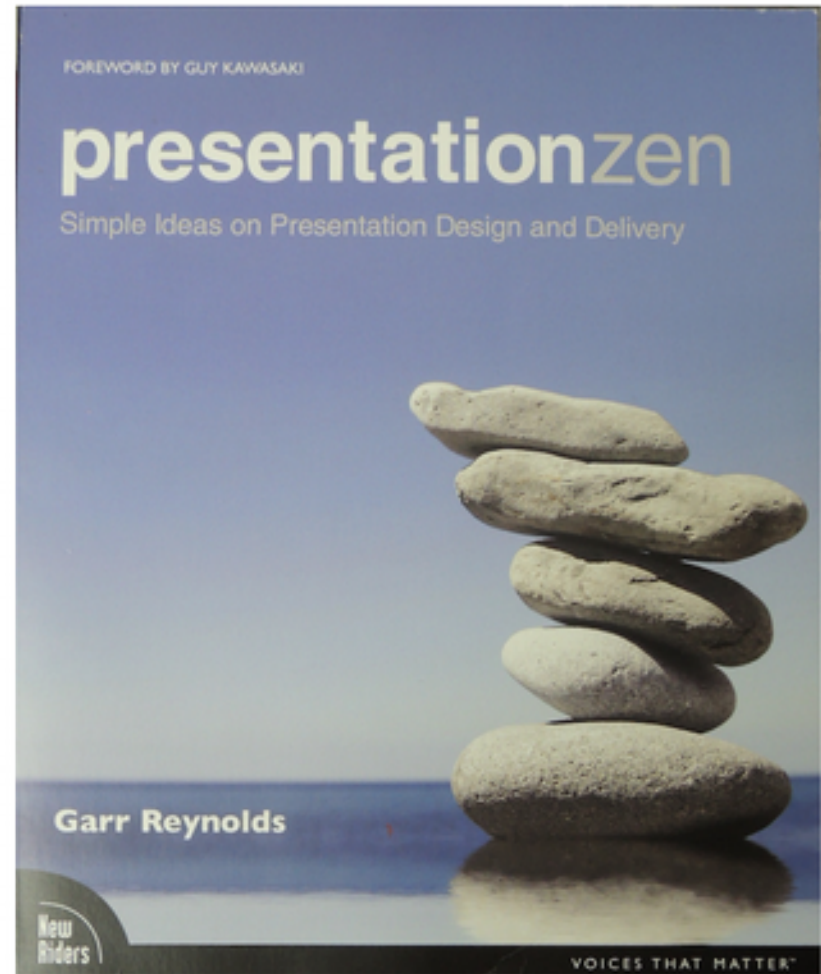


# Slideology book by Nancy Duarte



# Graphic design resources

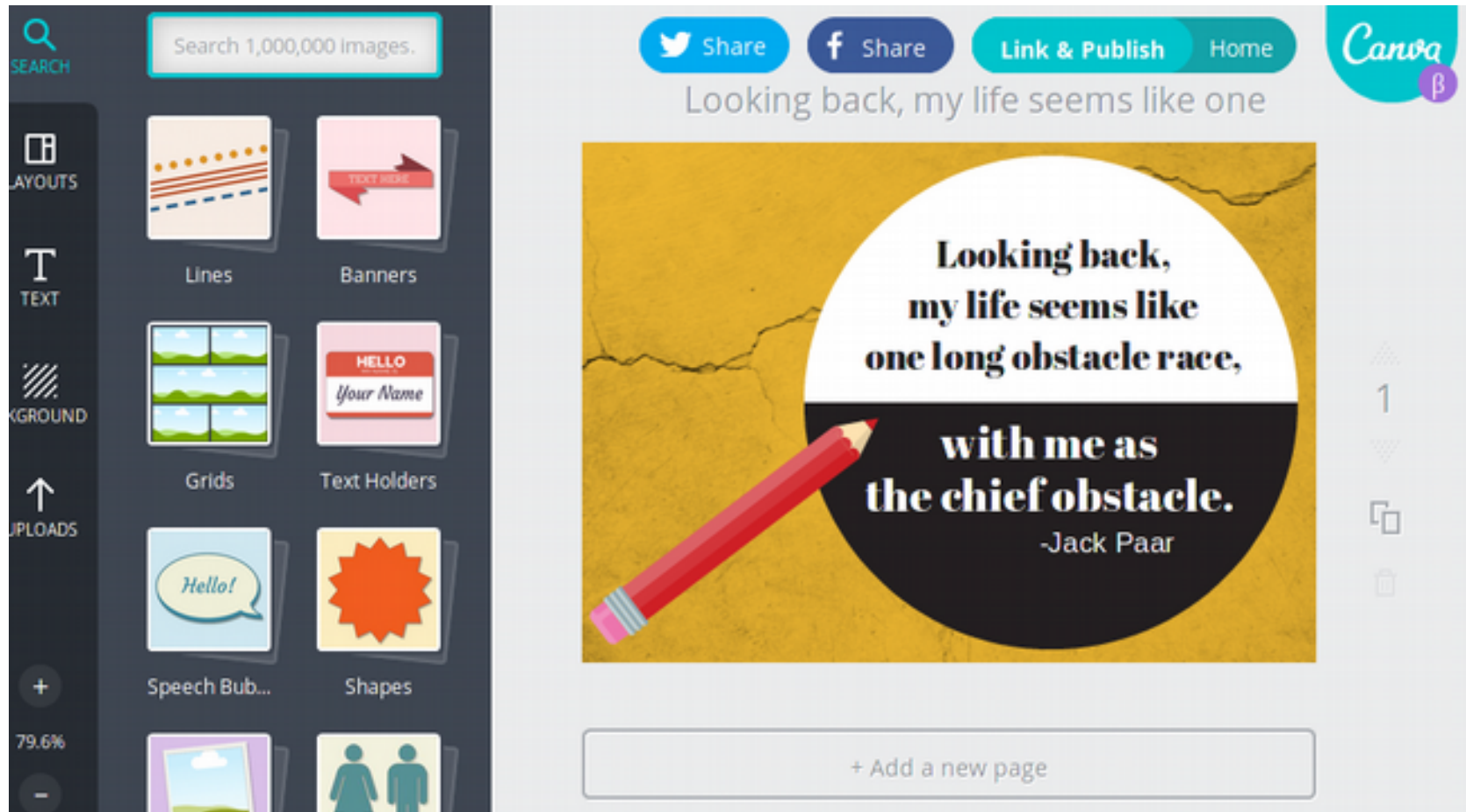
Presentation Zen book by  
Garr Reynolds



# Graphic design resources

Canva (website) with free pro membership for nonprofits!

[www.canva.com](http://www.canva.com)



# Graphic design resources

Unsplash (website)

[www.unsplash.com](https://www.unsplash.com)



UNSPLASH

Free (do whatever you want) hi-resolution photos.

10 new photos every 10 days. Subscribe

# Graphic design resources

## List of 53+ sources for photographs

<https://blog.bufferapp.com/free-image-sources-list>

More random inspiration:

<https://www.buamai.com/>

<http://defringe.com/>

<http://designspiration.net/>

<http://www.clikclk.fr/>

<http://butdoesitfloat.com/>

<https://niice.co/>



# Graphic design resources

Myfonts (website)  
[www.myfonts.com](http://www.myfonts.com)



FontSquirrel (website)  
[www.fontsquirrel.com](http://www.fontsquirrel.com)



ColorZilla Picker (free browser plugin- to find colors in a photo and match them in your fonts)

Also Paletton, which helps you pick complementary colors <http://paletton.com>



**ColorZilla**

Advanced Colorful Goodies

## ColorZilla for Chrome and Firefox

Advanced Eyedropper, ColorPicker, Color Analyzer and other colorful goodies for your Chrome and Firefox.



# Pop Quiz!

What action will you take from this webinar today?

1. Try some new fonts with my annual report
2. Look at Canva and see how to make more exciting graphics in it
3. Ask a donor if I could highlight them in the annual report
4. Something else

Next masterclass: Tuesday May 29<sup>th</sup>, 12-1pm PT (3-4pm ET) Advanced Annual Reports for Fundraising



Finally, join us on Thursday May 31st for our Advanced 2018 Annual Report Design Trends class, 12-1pm PT (3-4pm ET)







## Q&A

Thank you for coming today!

Let me know what you're working  
on: 503-206-9669  
[info@wildwomanfundraising.com](mailto:info@wildwomanfundraising.com)

If you'd like to learn EVEN MORE  
about writing and designing annual  
reports, check out my 4 week e-  
course on Annual Reports  
<http://wildwomanfundraising.com/>