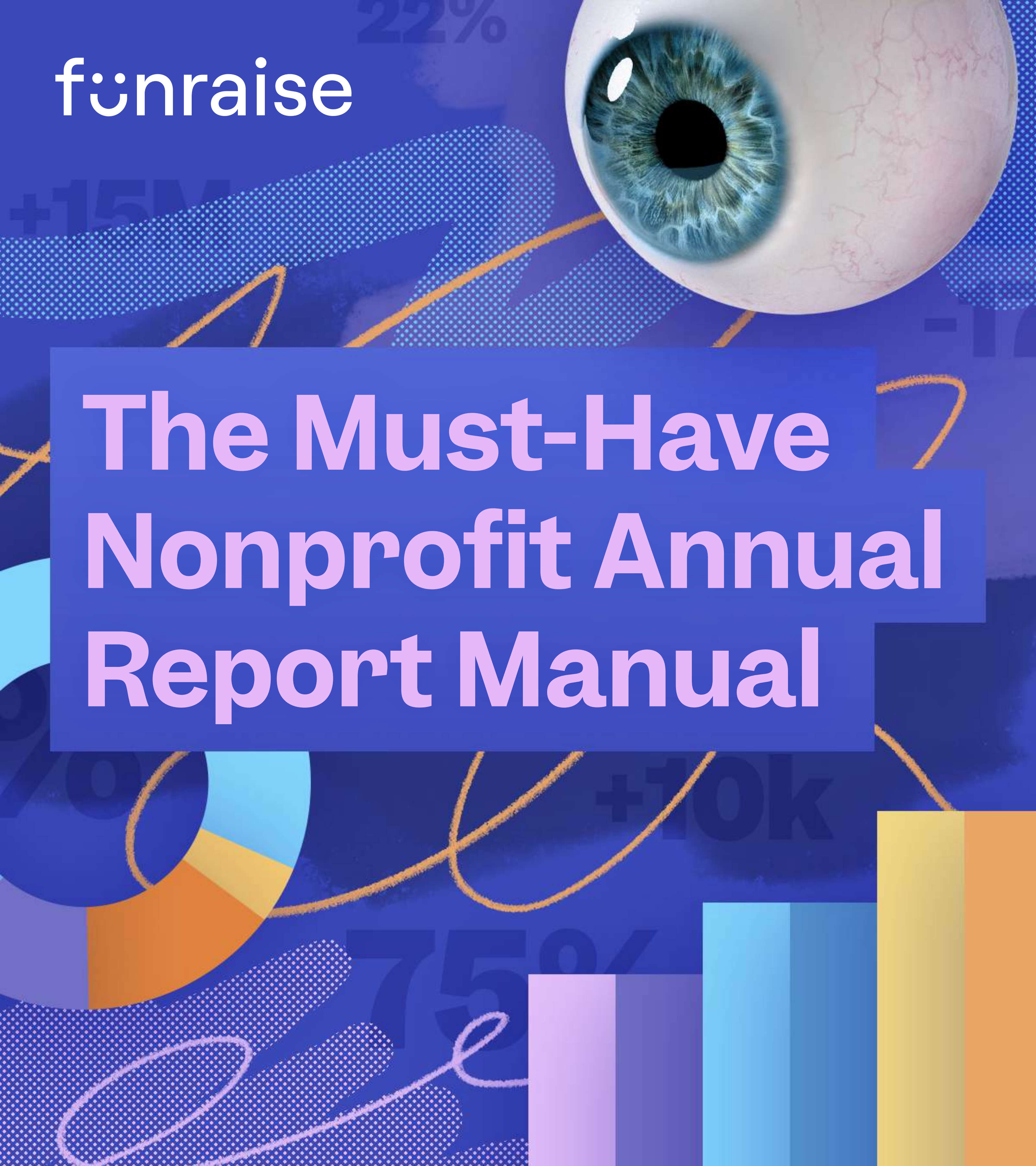


funraise



# The Must-Have Nonprofit Annual Report Manual





**Annual report time.**

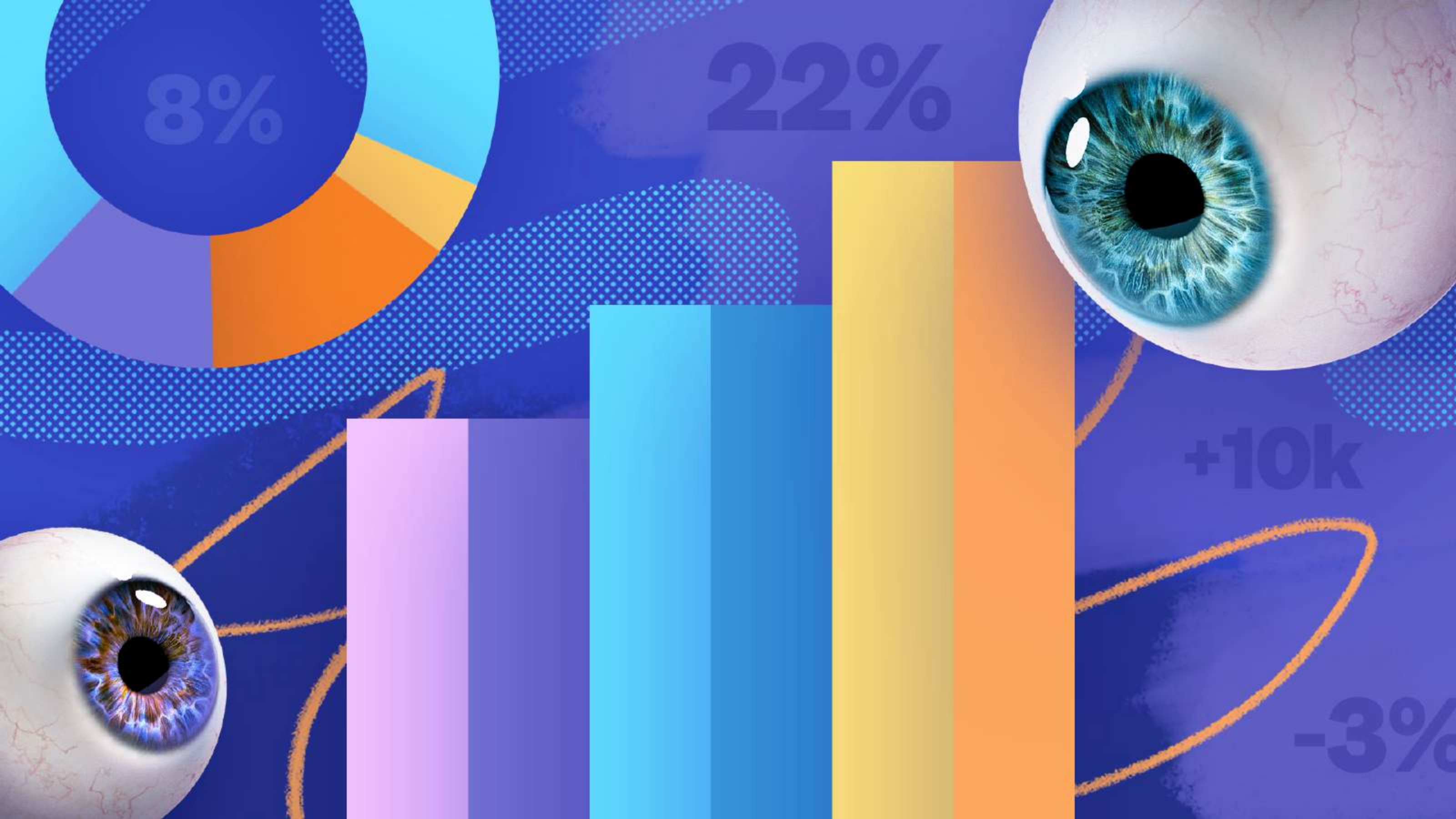
**It feels like we *\*just\**  
did this.**

In 2025, you used innovation and automation to start a fundraising revolution! Say that three times fast.

Now, it's time to show off your savvy skills with a knock-your-socks-off annual report worthy of top-trending status.

# Let's cover:

1. Reviewing Your Fundraising Program
2. Make an Annual Report with AI
3. Easy Annual Report Tools
4. Make-It-Count Elements
5. Awesome Examples



# Review your Fundraising Program

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# New year; new fundraising plan.

**But first...** it's time for an annual review of your nonprofit's current fundraising program.

Navigating 2026 with data-driven insights and forward-thinking strategy is only possible by first examining 2025's fundraising successes.



# Start with the Big Picture

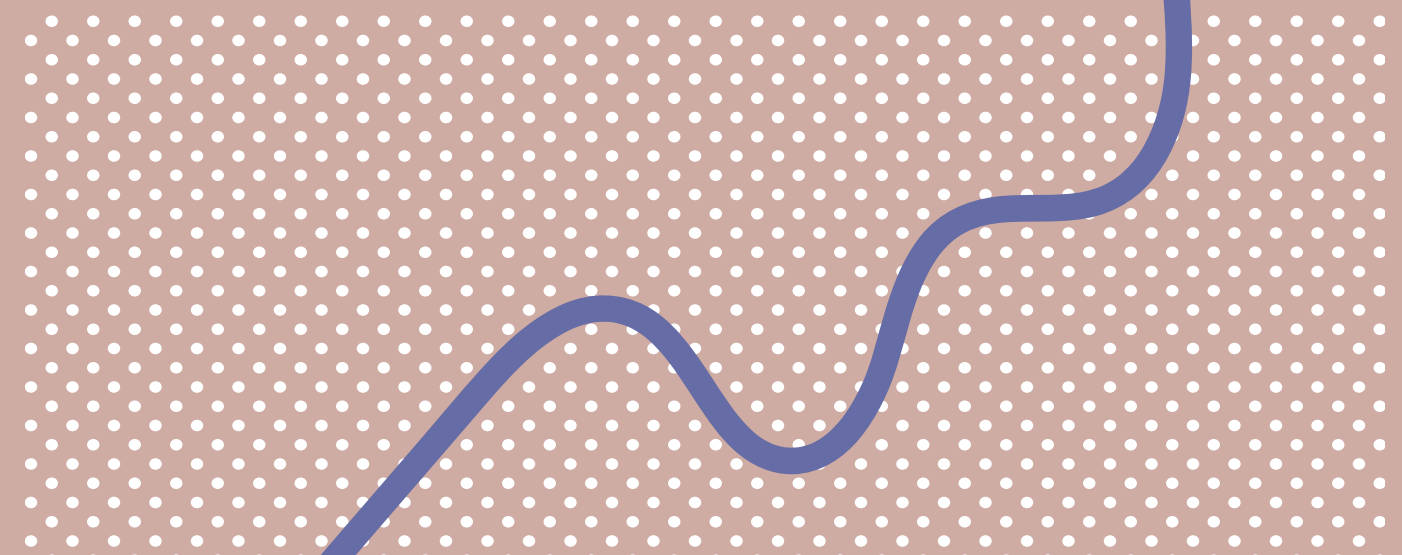
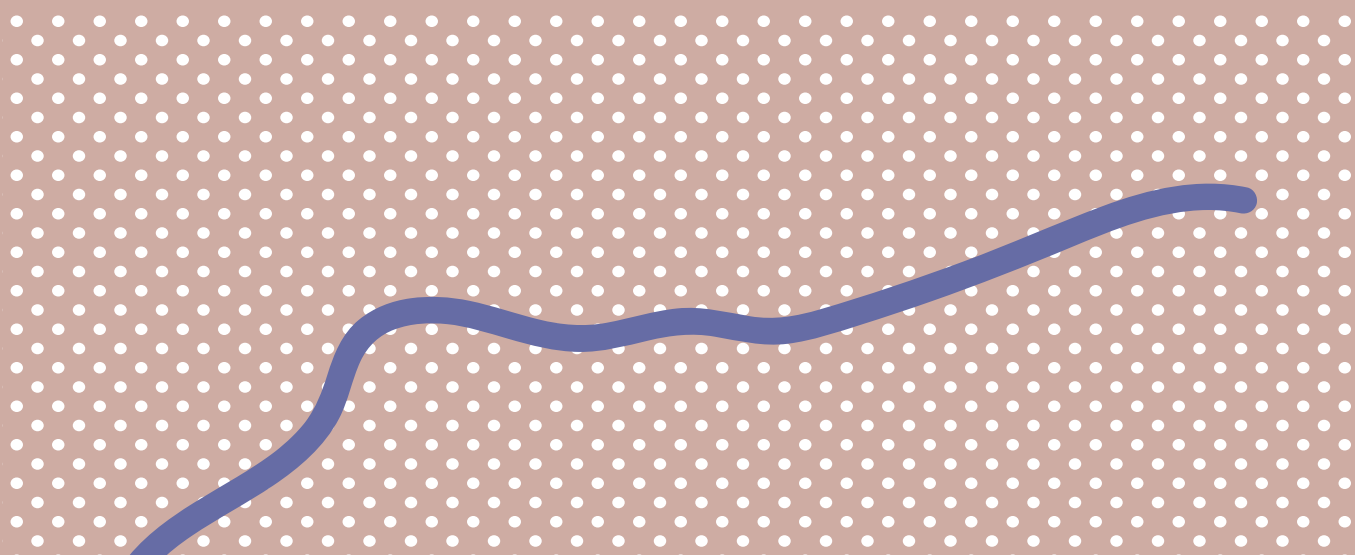
Pull your total amount raised from your donor CRM and compare it to your goals. Look at the overall accomplishment to uncover initiatives that didn't quite measure up and ones that knocked it out of the park.

Celebrate where you are today!

# Review each campaign

Chart individual campaign data side-by-side to identify which campaigns are thriving and which are (barely) surviving. Time for an overhaul!

Data highlights opportunities for your fundraising strategy to go from average to amazing.



**Now, put on your critical thinking cap and evaluate your campaigns as pieces of a whole:**

?

Which was your **most successful** campaign and why?

?

What **tactics** can you take away from that campaign?

?

What **challenges** did you encounter, and how did you overcome them?



# Audit it all

Look for trends in these must-have fundraising reports so you can make 💪 decisions this year.

- ✓ Total # of donors who gave last year
- ✓ Total # of new donors who gave last year
- ✓ Average and Median gift sizes
- ✓ Revenue by channel/appeal
- ✓ Donation page conversion
- ✓ Major gifts
- ✓ Amount raised per email sent
- ✓ List growth and churn

# Systems review

Process systems, tech platforms, and tools should all go under the microscope, too!

Look at the return from each one, run a cost-benefit analysis, and consider exploring your options.



# Check in with yourself

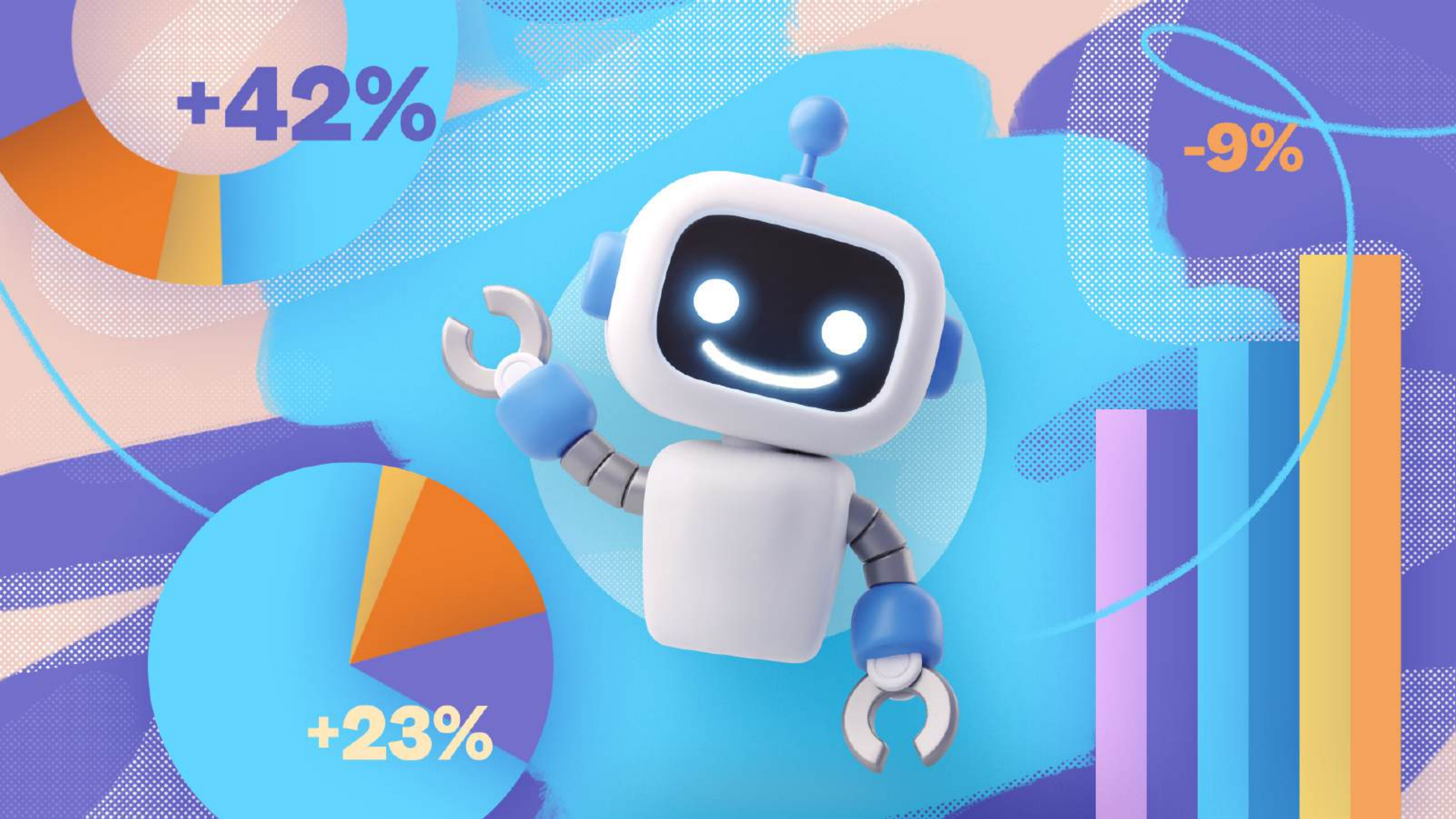
With each new year comes an opportunity for some honest self-evaluation.

**How did last year go for you?**

**How are you (really) feeling about the year ahead?**

Approach the year ahead with honesty about your work, the obstacles you may encounter, and the impact your job made on your life.





# Make an Annual Report with AI (in 5 easy steps!)

fünraise

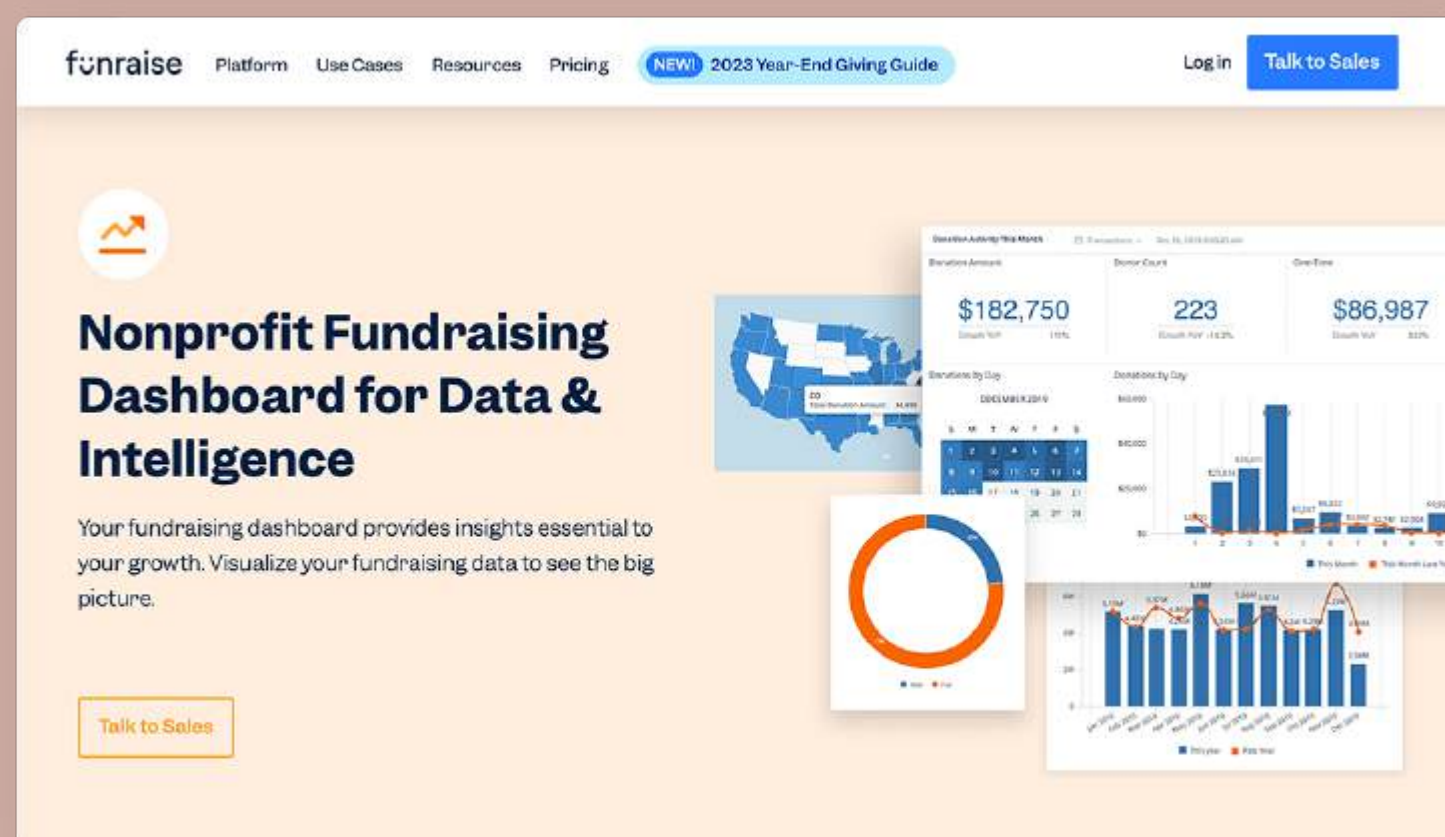


# 1. Pull the data

Use your best reporting tools, like [Funraise's Fundraising Intelligence](#), to break out 2024's impact highlights. One AI tool we love for creating reports from raw data is [Taskade](#).

## Keep AI In Check:

Confirm with a human that the numbers are correct. Your foundation has to be rock solid for your report to stand strong.



## 2. Uncover insights

It's time to feed the beast! Input your reports into an AI tool like [AnswerRocket](#) to uncover insights, analyze the data, and get answers.

### **Keep AI In Check:**

Confirm with a human that these insights are legit—none of this AI hallucination business.

Use these insights as a jumping off point and probe further. What else can you uncover?



## 3. Create the report!

The magic moment has arrived! If you're creating a standalone site, try [Storydoc.com](https://storydoc.com). For a slide deck, [Typeset](#) is awesome.

### **Keep AI In Check:**

Confirm with a human that your branding, logo, and message are accurate.

Bring in the humanity! AI can't bring what you can, which is lived experience, an opinion, and hope for the future.

## 4. Make marketing assets

The best parts of an annual report are all the juicy moments of impact you get to share. So make 'em shareable! Use Funraise's **free [Appeal AI](#)** tool to suggest content, build a social calendar, and create posts highlighting the highlights. (And so much more!)

### Keep AI In Check:

Confirm with a human that the wording+images are on point.

## 5. Acknowledge the AI

Although you've had a human monitoring each step, AI has played a major role in the creation of this annual report. It makes sense to recognize this role in the interest of transparency and historical authenticity.

As well, acknowledging your full journey—not just your accomplishments—rounds out the story of your impact and reminds your audience there is still work to be done.





# Nonprofit Tools for Easy, Impressive Annual Reports

fundraise



**Putting together  
your annual report  
can be a hassle.**

Here are some  
tools that'll get you  
excited to do this  
yearly task.

**You are the best  
tool in your  
fundraising toolkit.**

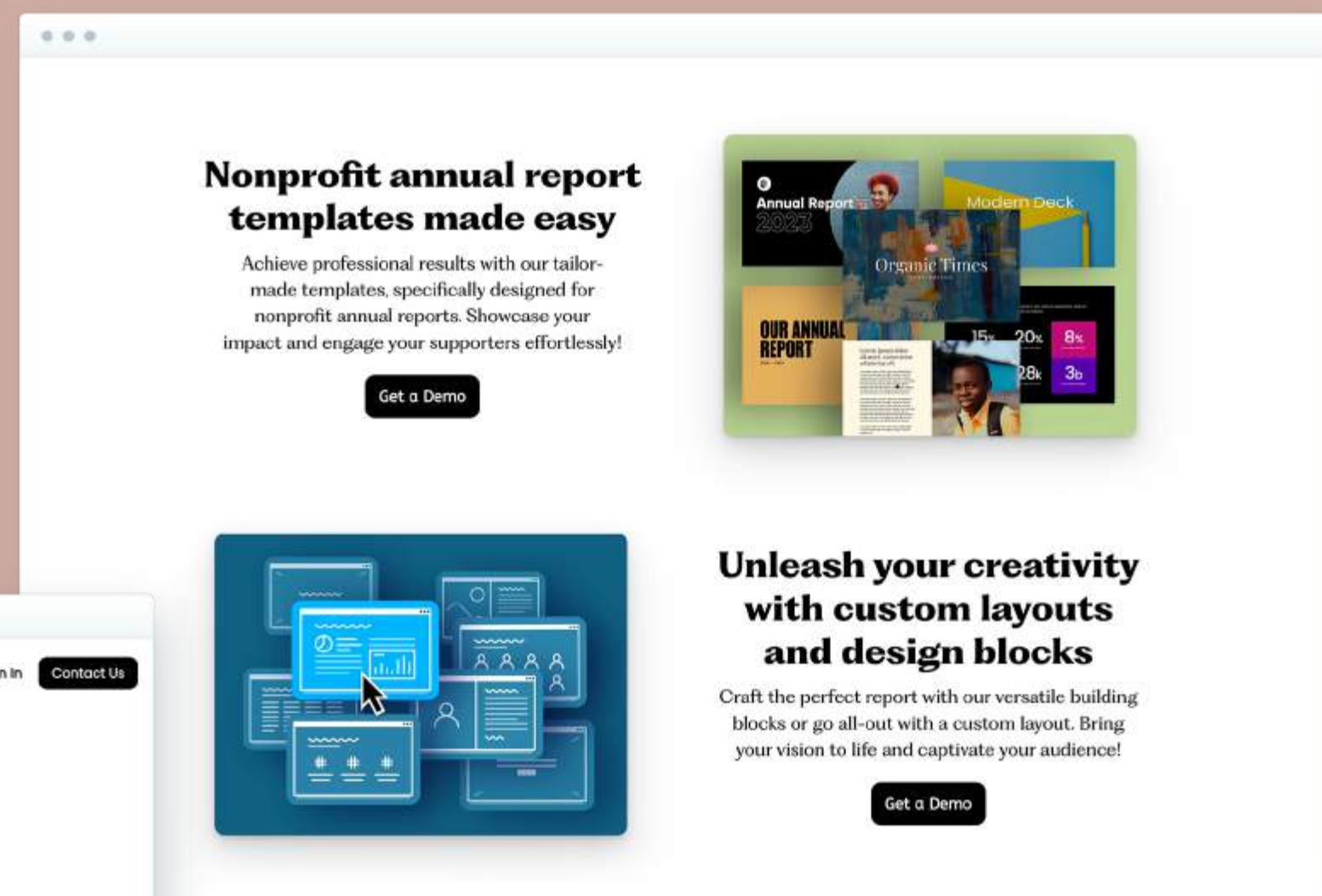
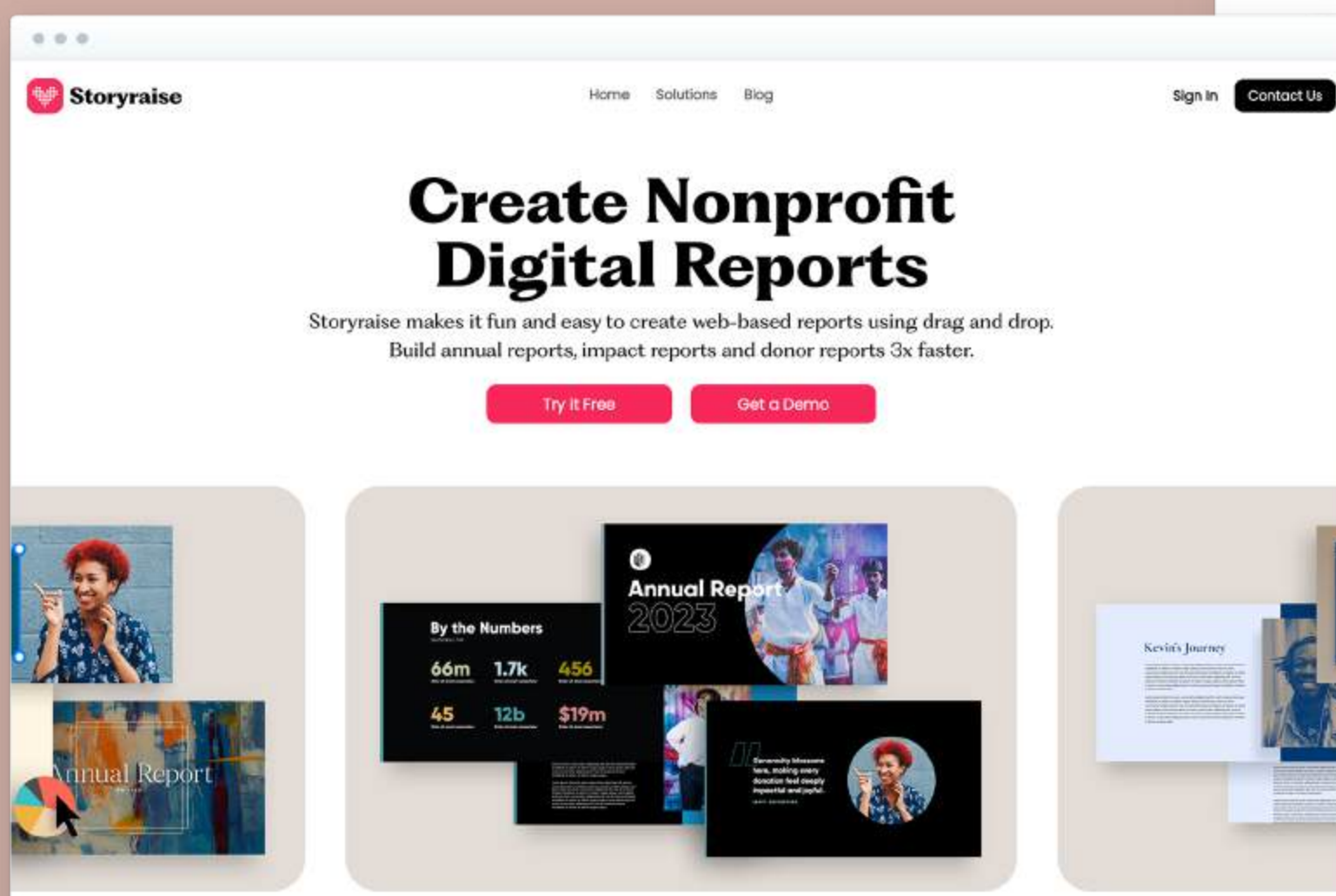
**Get strategic, get  
that data, and get  
ready for a  
whirlwind year  
ahead.**



funraise

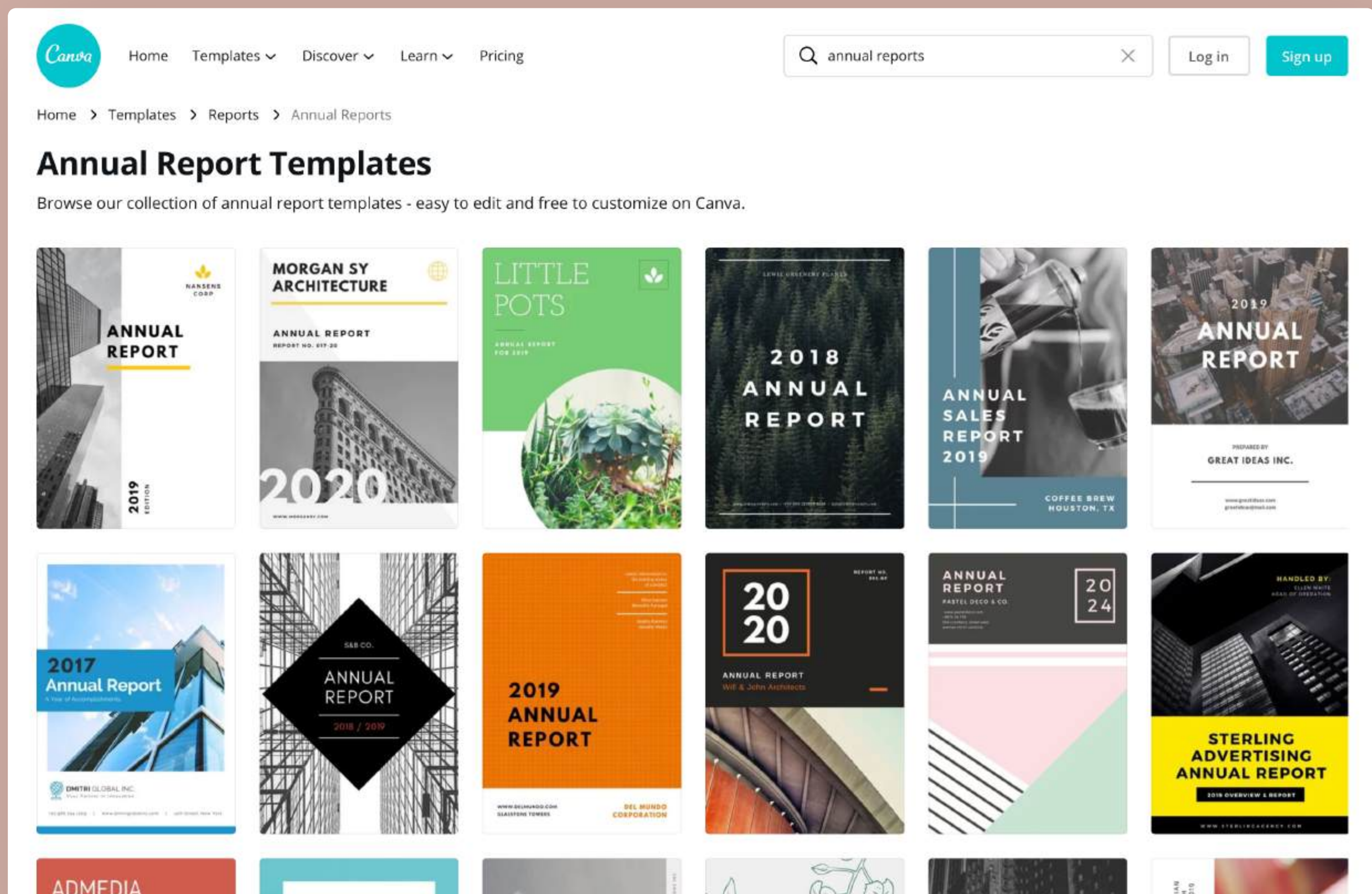
# Storyraise

Templates, tools, and help so that you can make a gorgeous, engaging, impactful annual report.



# Canva

Branded, customizable  
templates! Easy-peasy  
drag-and-drop interface!  
Creative infographic templates!





# Readymag

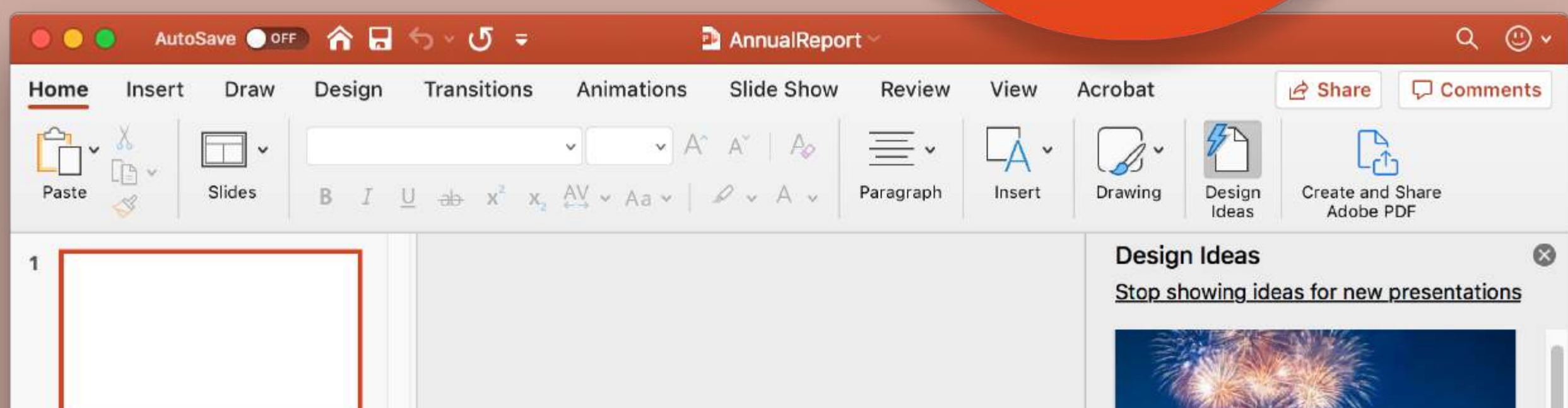
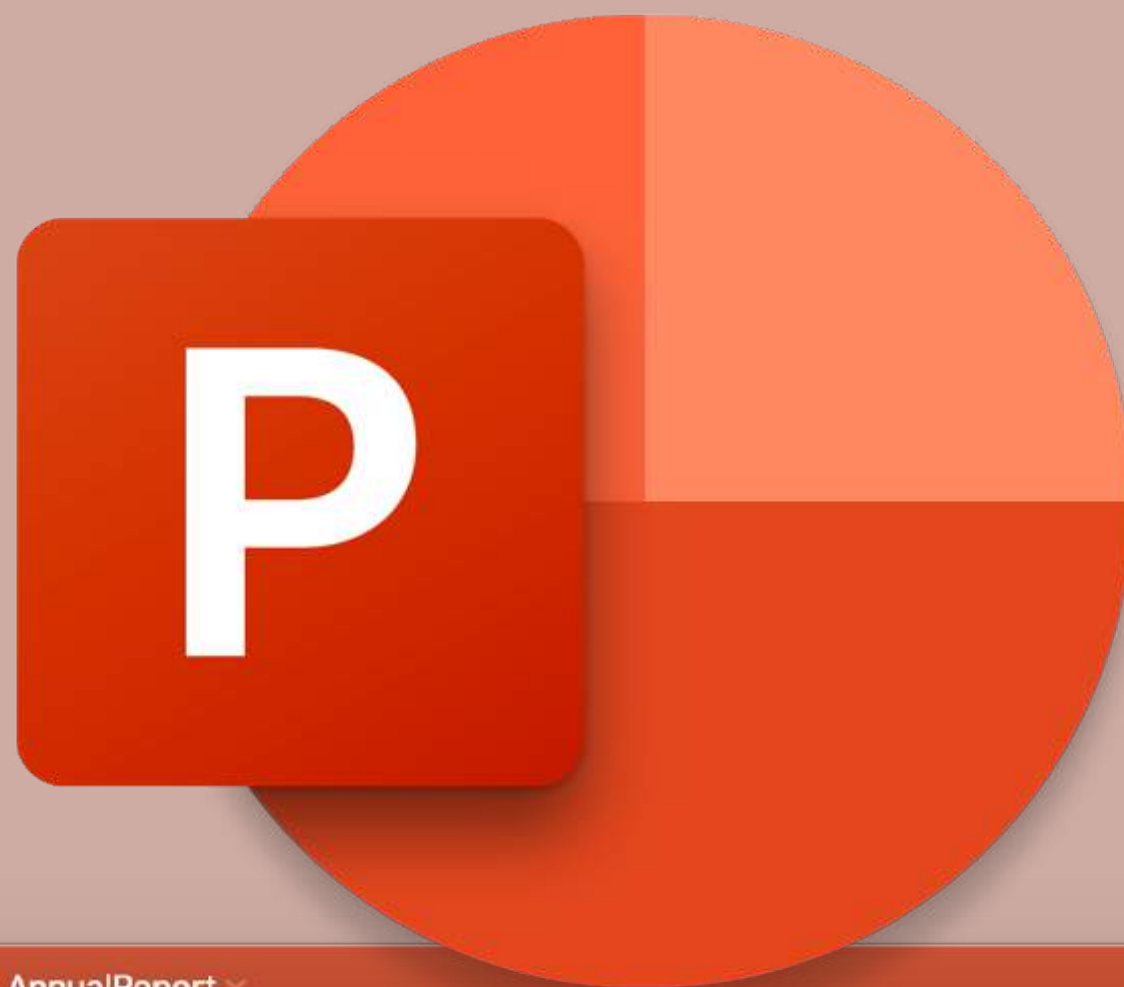
If your report is chock-full of content to share, build an in-your-face standalone site no one can ignore.





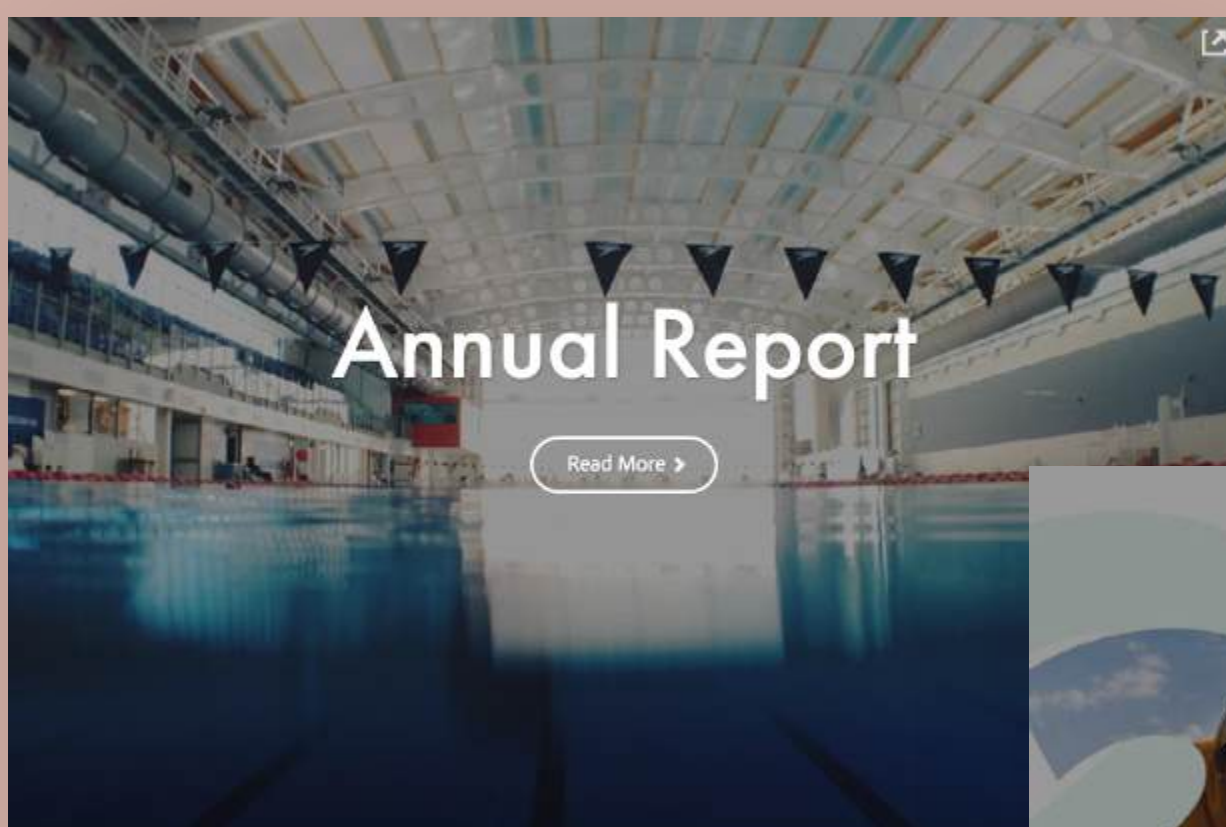
# PowerPoint

PowerPoint goes beyond slide decks. Image and text boxes + custom colors = a piece o' cake annual report.



# Adobe Creative Cloud Express

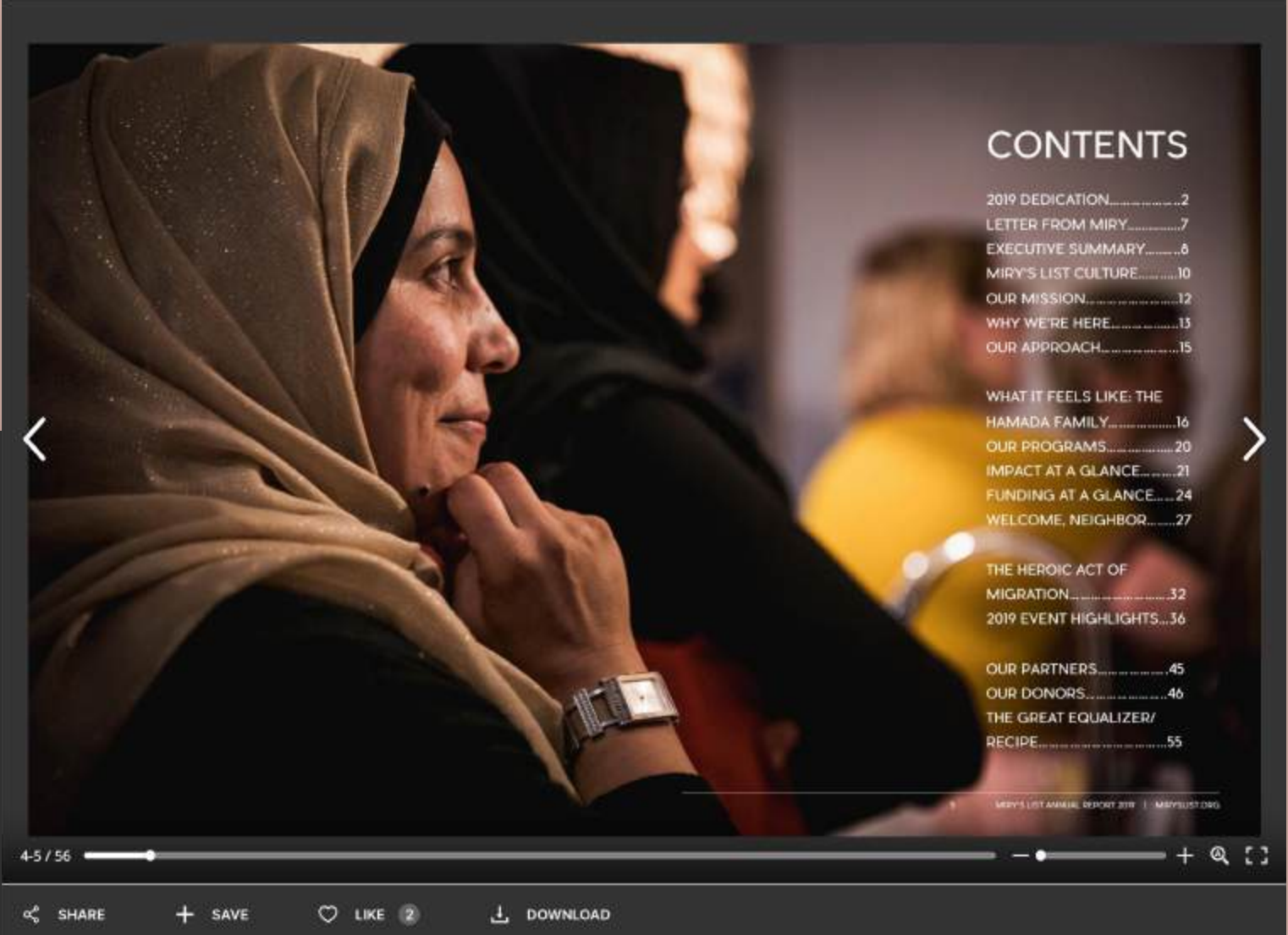
Ready to digitize your annual report? Adobe Creative Cloud Express allows you to create an interactive digital annual report.





# issuu

This inexpensive tool creates annual reports that look pro, feel familiar, and are real page-turners!





# Template time!

If you have a report that's been successful in the past, don't be shy about reusing it this year.

Even better, hand it over to a pro designer who can iterate on your best work and make a masterpiece template you can use year after year. The best start isn't always a fresh start, and you **can** begin in the middle.

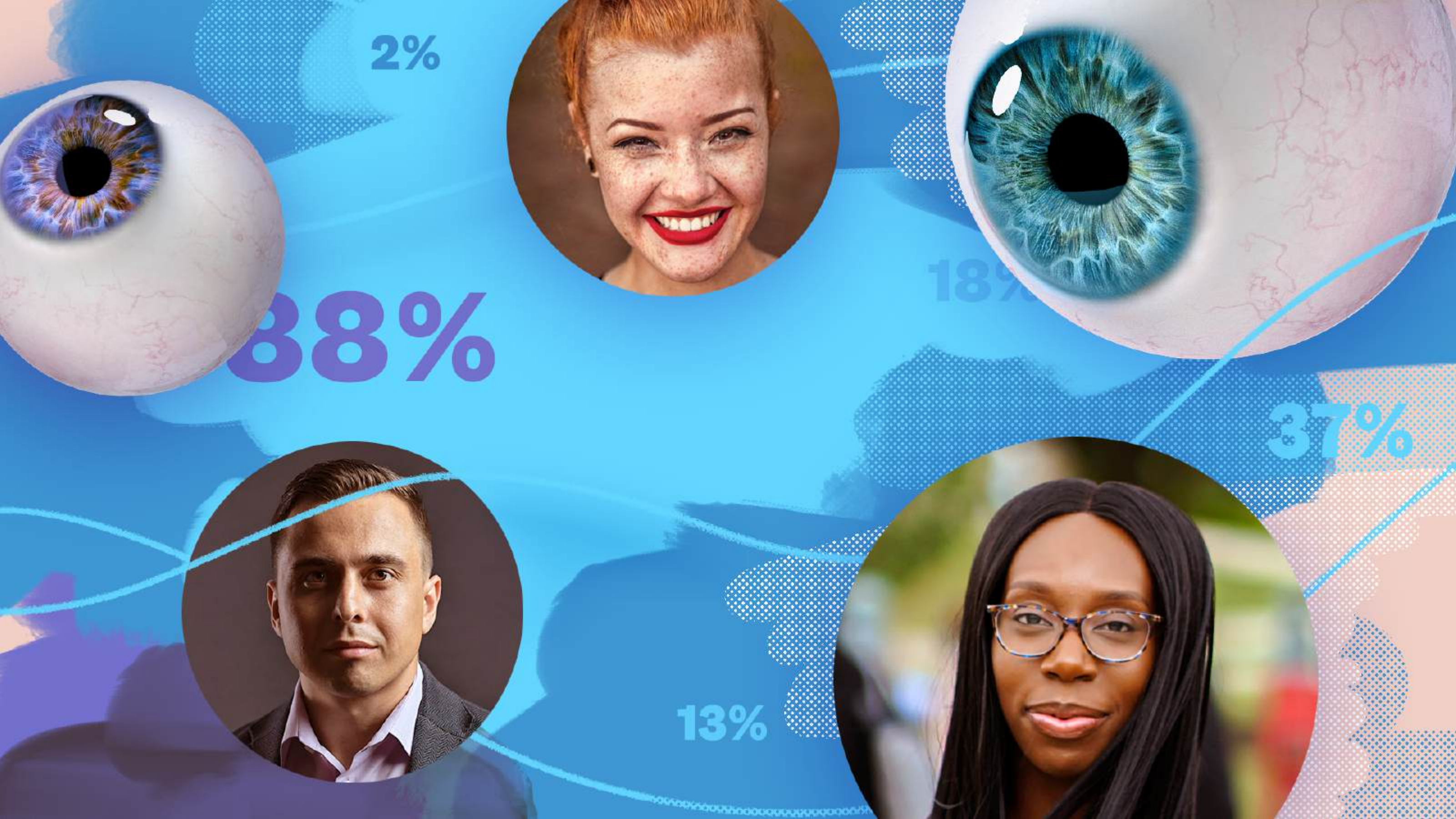
# Hire a designer

Consider the resources you're about to spend: hours creating your masterpiece and money on programs to make it possible. That's a lot.

The most cost-effective solution may be hiring someone who can create effectively and efficiently. Some resources to look into are Catchafire or Upwork.

Or check out Funraise's best-of-the-best [partners](#) and consultant [friends](#).





# Make-It-Count Elements for Multi-Use Reports

fünraise

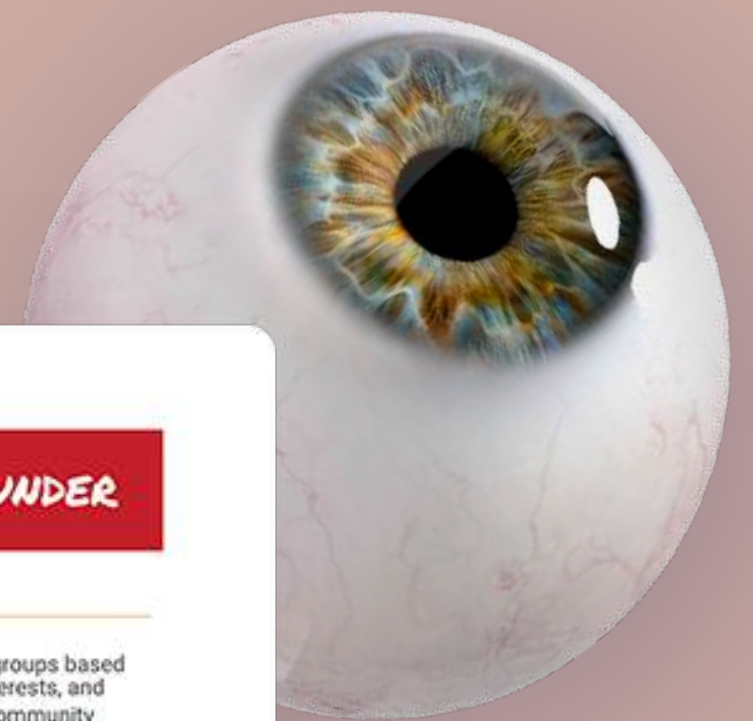


# Nonprofits!

Check out these  
must-have  
elements to make  
your annual  
report shine.

# Demonstrate Vision

Tease the coming year by demonstrating a future vision in your director's message or a short paragraph at the end of the report.



**SCOTT STRODE**  
Founder and Executive Director

## A LETTER FROM OUR EXECUTIVE DIRECTOR AND FOUNDER

**W**hile 2021 was a yet another trying year for our community and for our world, I am both honored and proud to say that The Phoenix organization as a whole and as individuals embodied one of my favorite quotes:

*Between stimulus and response, there is a space. In that space is our power to choose our response. In our response lies our growth and our freedom.*  
Viktor E. Frankl

Despite the incredible challenges faced through the various surges of COVID-19, we find ourselves on the precipice of rapid, hockey-stick growth. The Phoenix served 27,668 new members in 2021—our most impactful year yet from a new member perspective.

In 2021 alone, we served more new members than we did in the first 10 years of The Phoenix.

This is happening, it's happening fast, and we are ready.

The lasting effects of the pandemic –

with our community, allies, supporters, and partners.

Volunteers are core to our mission and the path we are taking to drive this rapid yet sustainable growth. We intentionally launched our volunteer engagement strategy this year, hiring dedicated staff and building out a thoughtful process for intake, onboarding, and supporting Phoenix volunteers. Our volunteers now have the tools and support necessary to seamlessly bring their talents and passions to their communities—not only to drive impact for The Phoenix, but perhaps more importantly, to provide a supportive space for them to self-actualize. Through this strategy, 532 new volunteers were activated and trained in 2021, impacting 7,471 community members and leading 6,320 Phoenix events around the country. With an acute focus on training, support, and instilling our core values, we continue to drive confidently towards our 2022 goal of 2,000 volunteers activated.

We also launched our mobile app this October—a technological and community-driving advancement that we are

finder, a sobriety tracker, groups based on location and shared interests, and CONNECT, which allows community members to connect 1-1 to provide mutual support. We will be expanding this functionality in 2022 as well as partnering with other apps in our space, with the vision of becoming a leader in recovery technology.

2021 has been a year of hardship, but in that hardship, we have been further empowered to drive deeper toward our mission of impacting one million people in recovery. We have made tremendous strides and we have big goals for 2022.

We could not and cannot do this alone. From the bottom of my heart, thank you for being a part of this movement – we are stronger together.

**Scott Strode**  
Founder and Executive Director

## Our Board

Don Fertman



3%

88%

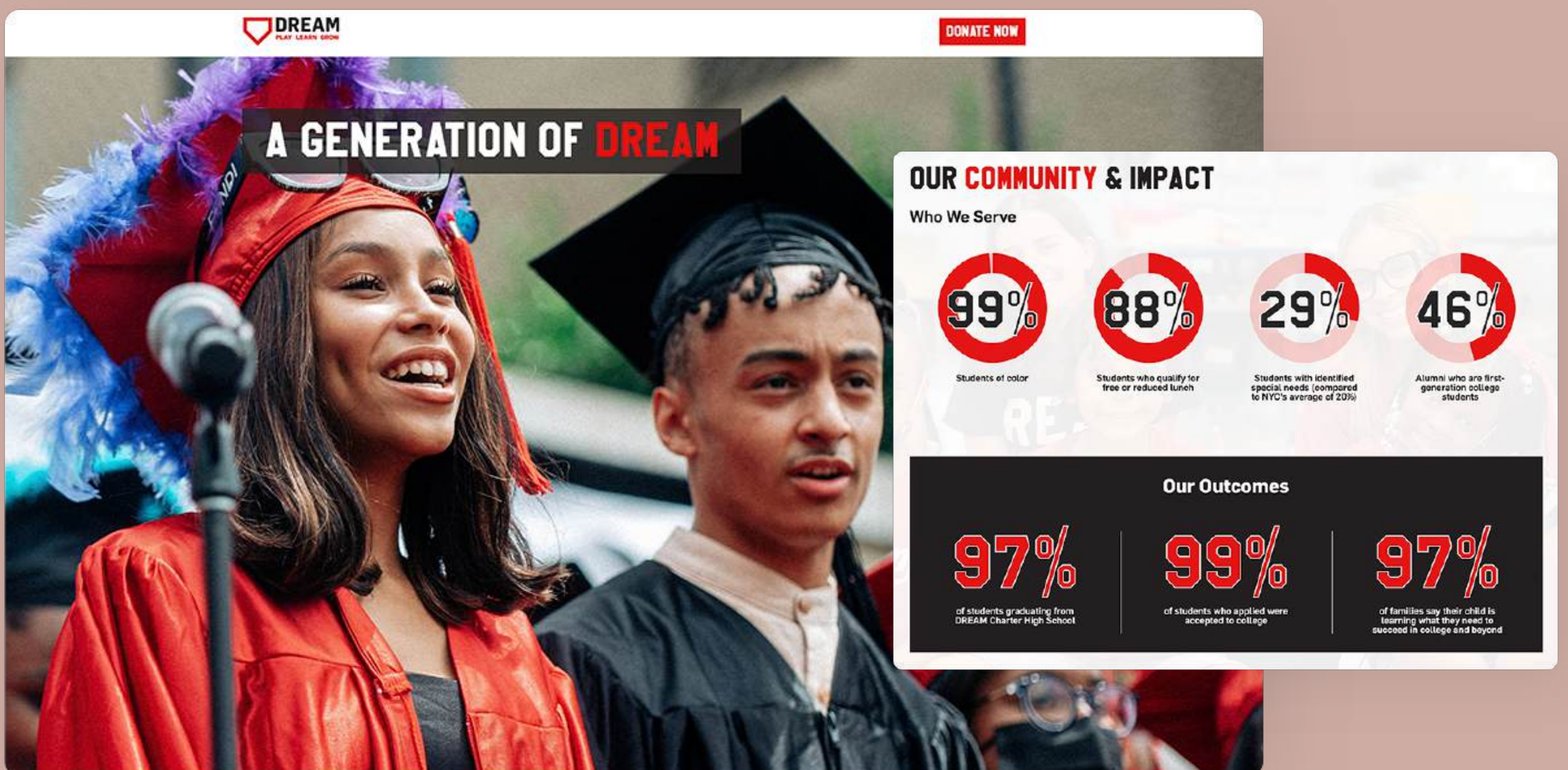
funraise

# Top-level Financial Information

Take a look at the DREAM annual report for a great example of top-level financials, simplified and summarized.

29%

42%





# Transparency Around Progress

Your annual report is a way to share achievements and setbacks openly, framing them in a way that showcases your resilience.

16



## The Importance of Valuing Community Relationships

By: The Calgary Professional Chapter

The EWB Calgary Chapter is one of 39 across the country. Many chapters are based out of universities and colleges, but ours is made up of professionals from across our city. We support EWB Canada through fundraising, fellowships, and awareness, and create change in our community by nurturing a generation of leaders who go on to change global systems.



# Donor-Centered Impact Stories

Find awesome impact stories to include in your annual report and step it up by telling them in a way that focuses on the donors' role.

## FROM OUR DONORS

### Kaitlyn and Ben Zigrang



Kaitlyn and Benjamin Zigrang have supported the Innocence Project since 2021 through generous contributions and gifts in support of our annual gala. In September 2023, they hosted an exoneree at their restaurant to raise awareness about wrongful convictions. The Zigrangs are entrepreneurs raising their young family in Tulsa, Oklahoma.

#### What initially brought you to the Innocence Project's work?

**Kaitlyn:** We came to the Innocence Project during a time when there was a lot of awareness being raised around racial justice issues. We researched organizations that were doing meaningful racial justice work and how we could get involved. We found the Innocence Project and were so inspired by the work.

**Benjamin:** We were having difficult and eye-opening conversations with our friends of color about their experiences and their family members' experiences during incidents like traffic stops. It galvanized us to be part of the solution.

#### What does your involvement with the Innocence Project mean to you?

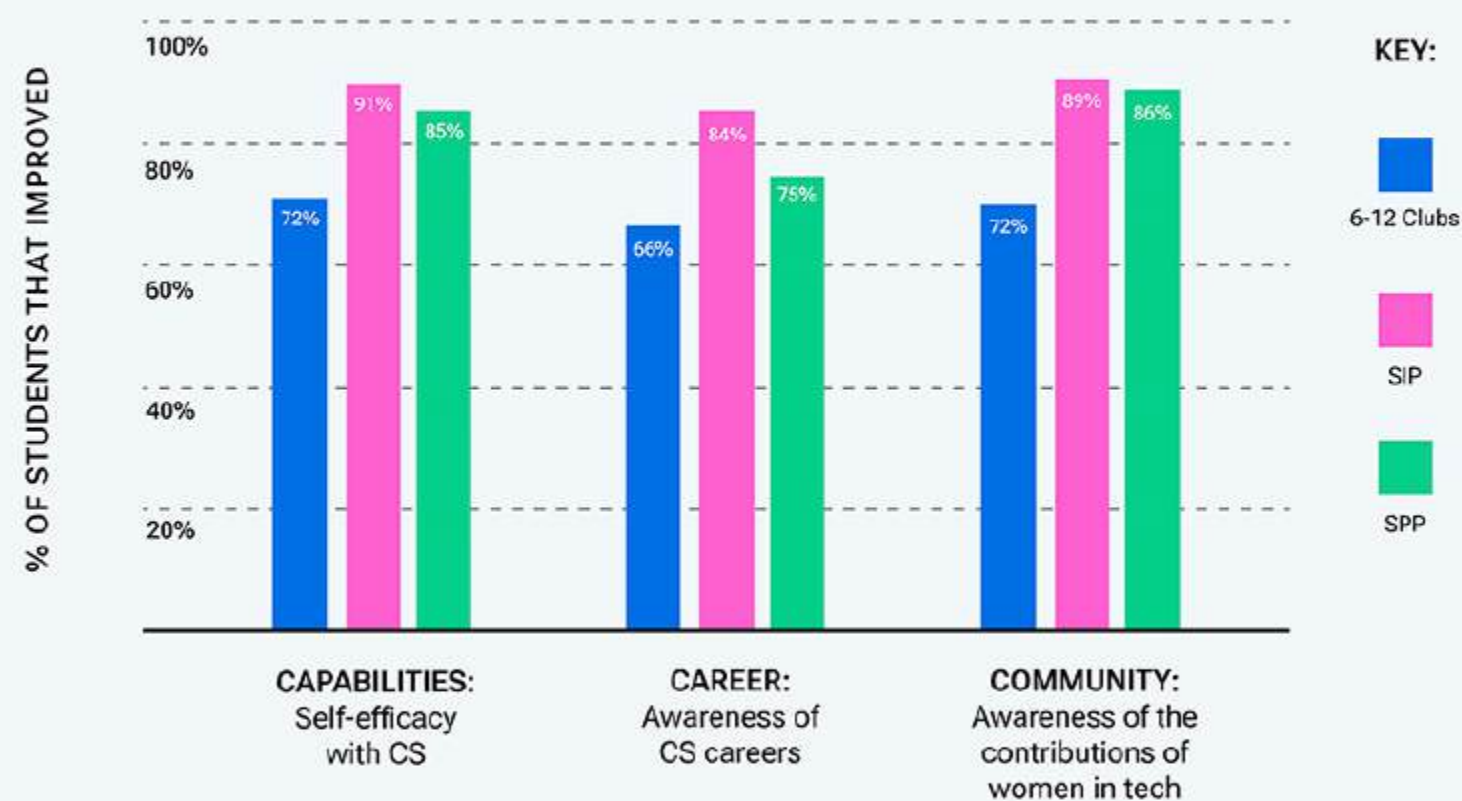
# Share Those Stats

But only the most important ones.

Pick a handful of metrics that demonstrate your impact, then infographize to make them visually interesting and digestible for your audience.

## SHORT-TERM OUTCOMES

The majority of Clubs and Summer Program students make gains on outcomes associated with persistence in computer science.





# Put Your Best Faces Forward

Photos not only add visual interest to the document, but also bring your readers closer to your work.



# Make your lists and check them twice.

Seriously. Triple-check everything for accuracy in your annual report. That means names, numbers, and details!

**Pro Tip:** Practice pronouncing names if you're making a video.





# Include a Call to Action

You don't need a hard ask, but your annual report is a natural opportunity to present pathways to support your organization.

**YES!**

Want to become part of the impact you see here?

*Invest in*  
**WATER**

DONATE



**Make the most of  
your annual report  
by using it all year  
long.** Include these  
make-it-count  
elements for a  
double-duty  
annual report.



# Rip Yourself Off!

Make the most of your staff's time and resources by reusing videos, short copy descriptions, images, and infographics.

[https://youtu.be/bFagWd1\\_T6c](https://youtu.be/bFagWd1_T6c)

COPY

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam tempus magna vitae turpis ultrices bibendum. Aliquam sollicitudin, est eu commodo tristique, lorem ipsum pulvinar justo, et sollicitudin urna dolor et libero. In commodo elit facilisis cursus posuere. Mauris nibh ultricies vel tristique sit amet, mattis volutpat. Praesent sit amet diam at lacus ornare fringilla vel Duis ac posuere libero. Nam porta nulla ut imper dictum. Maecenas sollicitudin augue at orci cursus nec at nunc. Nam laoreet ligula vitae metus feugiat Curabitur urna tortor, dictum sed arcu eget, com iaculis erat. Vivamus consequat faucibus aliquam.

# Make it Accessible

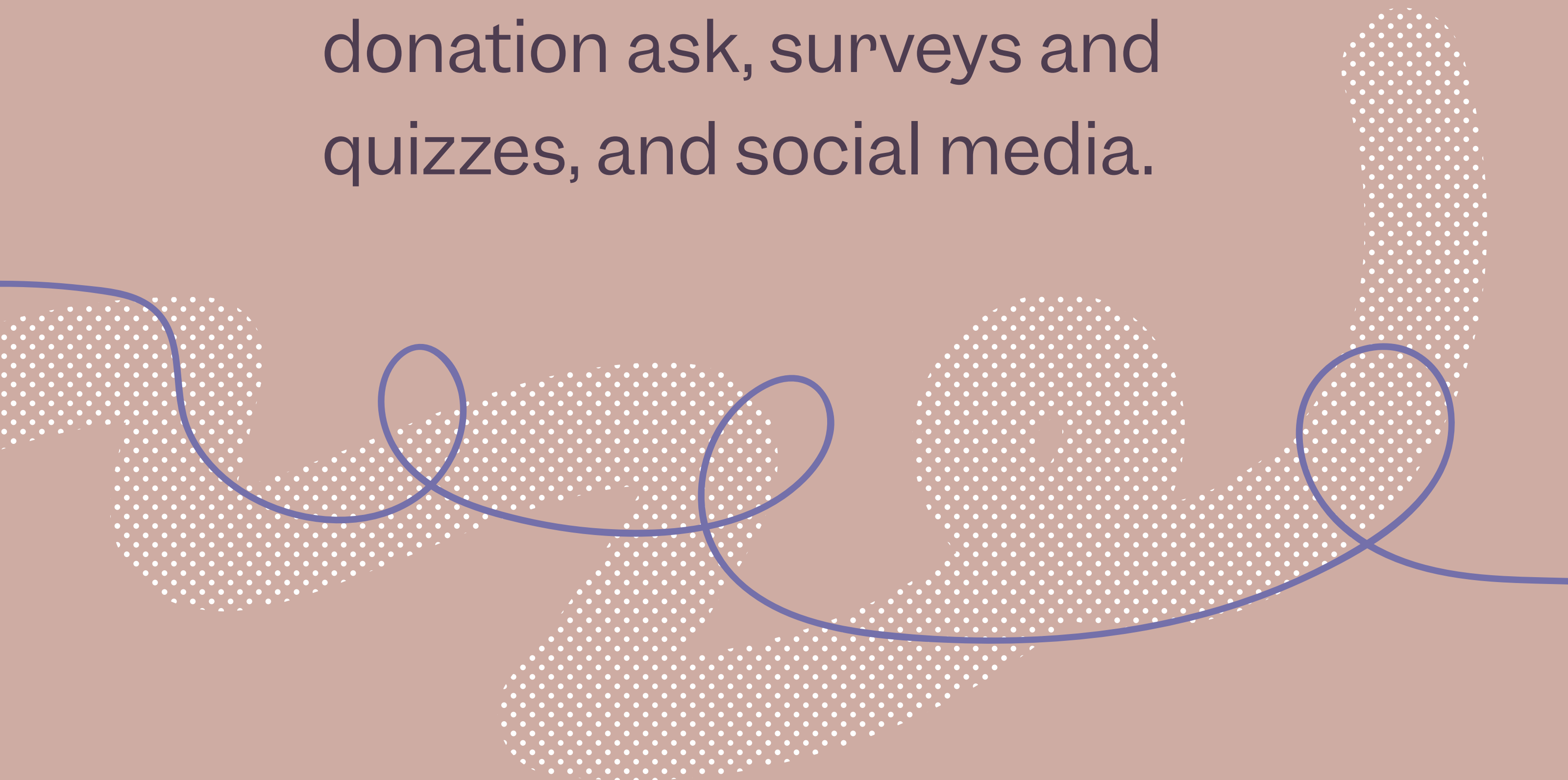
Captions, translations, and a variety of filetypes and color palettes will ensure that your hard work can be easily digested by everyone.





# Engagement Loops

Your annual report should encourage readers to interact with your nonprofit. Experiment with engagement loops like the donation ask, surveys and quizzes, and social media.







# Awesome Nonprofit Annual Report Examples

fundraise



**Check out these  
7 nonprofits  
forging into the  
future with  
awe-inspiring  
annual reports!**





*2022 Annual*

ONE RELENTLESS PURSUIT

# REPORT

## DIGDEEP

DIGDEEP's comprehensive annual report takes supporters through twenty-five pages of data-driven impact demonstrated through storytelling, statistics, timelines, and compelling images.



# WHAT YOU CAN DO

---

Stay up to date about programming and events:



Subscribe to our mailing list: [www.gatheringforjustice.org/maillinglist](http://www.gatheringforjustice.org/maillinglist)



Text “The Gathering” to 44321 to make a donation

Making a generous, tax-deductible donation today:



Donate via our Website [bit.ly/gfjdonate](http://bit.ly/gfjdonate)



Donate via CashApp (\$Gathering4Justice)

## The Gathering for Justice

Now, this is an annual report that galvanizes support! We love the call to action on the last page, giving supporters the opportunity to make instant, direct impact.

# A GENERATION OF **STORIES**

Hear directly from the DREAM Family on how our investment in the youth of our communities has made a difference.

**Jason Medina, DREAM Legend**

"DREAM does something different. They've brought change, and they've stuck with that change."



**Khloe, DREAM Charter School Student**

"I love to go to DREAM Charter School because you can make new friends and learn new things."



**Marielena Fernandez, DREAM Legend & Youth Development Specialist**

"DREAM is a place of opportunity; a place where children and their families alike can envision a future."



**Katie Colón, DREAM Parent and Programs Manager**

"DREAM doesn't feel like a school as much as a part of our journey as parents and my child's journey as a young person."



# DREAM

DREAM uses annual report data to show off their lifetime achievements in their annual report. Easy access to impact info? We love to see it.





**MEET JOSELYN**

## Plant With Purpose

This scrappy nonprofit startup's annual report relies heavily on testimonials to pull the weight of their groundbreaking data.





# Parks of the Future

By supporting innovative projects that reimagine and enhance the way we experience our parks, NPF is helping shape the visitor experience at parks of the future.

## National Park Foundation

The National Park Foundation is very explicit about what they're doing in the future by adding their vision for parks to their annual report.





“ We are proud of our longstanding partnership with Fair Food Network and the collective work and impact in supporting healthy food systems and food economies. And we look forward to continuing our investment in the partnership and work in service of thriving communities and sustainable economic development in Southeast Michigan.

— Jim Boyle

Ralph C. Wilson Jr. Foundation

## Fair Food Network

Fair Food Network celebrates not just their own impact but the collective impact they make with partners by highlighting collaborations in their annual report.



# THIS YEAR,

317 fighters improved their boxing skills and had an average GPA of 3.3,

community members enjoyed over 66,000 lbs. of food through our food party, &

fighters grew their knowledge of computer science, money management, and more.

## 2022 HAS BEEN AMAZING.

## THANK YOU.



"I'm most proud of getting my grades up  
It feels good because I can get into a  
good collage and a good high school."  
-Alejandro

## The Bloc Chicago

This youth-focused org's fiscal year ends in June, making winter the perfect time to cherry-pick compelling impact info collected for their annual report.



**Funraise is an  
awesome fundraising  
tool, no matter what  
time of the year it is.**

Now's the perfect time  
to **chat us up** to get the  
special Funraise scoop.

**When you're done  
with your annual  
report, send us a  
copy!.**

**You did hard things  
this year, and we're  
proud of you.**

**You. Are. Awesome.**

**funraise**