



Annual Report Service Grant

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Outline

- What is an Annual Report Service Grant?
- Why do an Annual Report Service Grant?
- What are the deliverables and what is considered in scope?
- What is not in scope for this Service Grant?
- What are the criteria to qualify for this Service Grant?
- Process
 - Key milestones
 - Pro Bono Consultant team
 - Project management and tools
 - Timeline
- Spotlight: LifeLong Medical Care

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What is an Annual Report Service Grant?

The Purpose:

- Design and produce an annual report that serves a focused need and is grounded in a deep understanding of the targeted audience
- Build and refine all elements of the annual report—photos, data, layout, text, financial data—to communicate the organization's message in multiple ways to meet the readers' emotional, credible and intellectual needs

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Why do an Annual Report Service Grant?

A Brochure Can Help Your Organization with:

- Increased donations from major donors and funders
- Improved relationship with potential donors and funders; higher conversion of leads
- Increased brand recognition in the philanthropic community

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Activities in Scope

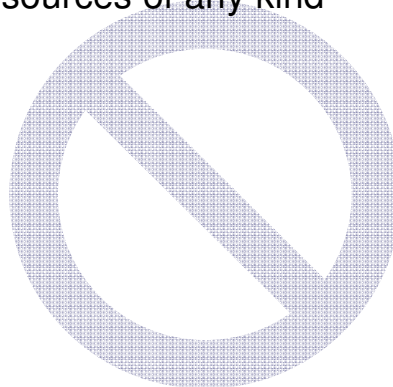
- **Discovery Interviews** with a range of your organization's staff and key stakeholders
- **Deliverables:**
 - ➔ Creative or requirements brief that details your organization's needs and the pro bono consultant team's suggested approach – your brand strategy
 - ➔ Production of a print-ready annual report
 - ➔ A process, including roles, responsibilities and timeline, for updating and publishing the annual report in subsequent years
 - ➔ Training for key staff members on the annual report process

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Activities that are not in scope

- An audit or audit preparation of financials
- Printing or distribution resources of any kind



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Grant Criteria

We recommend you apply if your organization has:

- A clear sense of your audiences and the key messages you wish to communicate to each (otherwise, our Key Messages & Brand Strategy Service Grant may be a better place to start)
- Existing effective printed marketing materials such as brochures or fundraising
- Right time for applying:
 - Financial Year ends in September: Apply in June or September round
 - Financial Year ends in December: Apply in September or December round
 - Financial Year ends in March: Apply in December or March round
 - Financial Year ends in June: Apply in March or June round
- Staff who can invest the necessary time to make the project succeed:
 - Executive Director: 10 to 15 hours total
 - Day-to-Day Contact: 3 to 5 hours each week
 - Collaborator for our Writer: 10 to 20 hours total
 - Accounting or Financial Contact: 10 to 15 hours total

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The Process



* Please note that while the Pro Bono Consultant team completes most of the work, the nonprofit also has tasks and deliverables at each stage.

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The Annual Report Team

- Account Director
- Project Manager
- Marketing Manager
- Copy Editor / Writer
- Graphic Designer
- Strategy Analyst
- Photographer

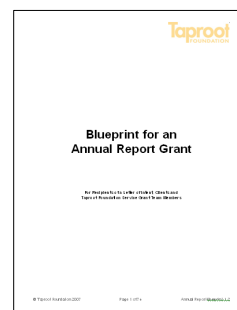
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Program Management and Tools

Your organization will be equipped with the following resources for the Annual Report Service Grant:

- Leadership from Account Director
- Oversight from Project Manager
- Pro Bono Consultant team with Taproot tools that can be shared with you as needed:
 - Annual Report blueprint
 - Helpful articles and links



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Ideal Timeline*

Stage	Approximate Timing
Letter of Intent (LOI) Sent	
Account Director Assigned / Site Visit	1 month after LOI sent
Staffed	2 months after LOI sent
Kick Off Completed	3 months after LOI sent
Discovery Completed; Findings Presented	4 months after LOI sent
Requirements Brief Approved	4 – 5 months after LOI sent
First Drafts Presented	5 months after LOI sent
Draft Direction Approved / Building Out	5 – 6 months after LOI sent
Final Presentation & All Materials Approved and Delivered	6 – 7 months after LOI sent
Project Closed	8 months after LOI sent

*Ultimately, depends on you and your team

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Spotlight: LifeLong Medical Care



“The Taproot team helped us **articulate what we do** and created a classy piece that really **reflects our achievements** and our role in making our community a better place. Now we have a **great model to build on** in future years”

NANCE ROXENCRANZ
Director of Strategic Planning & Development, LifeLong Medical Care

LifeLong Annual Report:



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