

Charities Review Council's Annual Report Checklist

Required Items of a Meets Standards® Annual Report:

✓	Item	Examples/Helpful Hints
	Mission Statement	To increase K–12 student success in math and science.
	Description of each Major Program (should match what is provided in the IRS Form 990 Part III)	1. After school tutoring 2. Summer camps 3. Parent training (with a brief description of each)
	Major Program Accomplishments (specific & objective)	We serve 25% of students in our service area. Schools report increased academic performance of students participating in tutoring & summer camps. Parents indicate they are better able to assist their students with math & science homework.
	Geographic Location(s) & Population(s) Served	Families with children in K–12 schools in the Twin Cities Metro area.
	List of Board of Directors	Include officer titles (e.g. President, Secretary, Treasurer, etc.)
	List of Key Paid or Volunteer Staff	At a minimum, include the Executive Director
	Balance Sheet (assets & liabilities)	See Charities Review Council Example
	Financial Statement (revenue & expenses)	See Charities Review Council Example
	Functional Expense Allocation (dollar amount)	See Charities Review Council Example Should include Programs, Fundraising, & Management costs, as reported in the IRS Form 990.
	Total Cost for each Major Program	See Charities Review Council Example This is listed in Part III of the IRS Form 990. If you have only one program, this is the same as the total program costs.

Annual communications can exist in various formats including: print, web-based, and/or video. However, this information should be easy to access online requiring less than three web clicks from the home page.

Additional Good Practices of an Annual Report:

✓	Item	Examples/Helpful Hints
	Key Beliefs, Values, and/or Principles	We believe _____ and _____ are _____.
	Brief History of the Organization	Started in (year) to do _____ for the _____ by _____.
	Letter from Executive Director or Board Chair	This year we accomplished _____, we are looking forward to _____, are grateful for _____, and need help with _____.
	Volunteer Spotlight	Highlight awesome volunteers with a great story.
	Acknowledgement of Partners, Supporters, & Volunteers	Partnerships with other agencies and general thank you to volunteers (include number of volunteers, hours served, in-kind contributions etc.)
	Call to Action	You can help by _____, & give at _____ or by _____.
	Donor List (individuals, businesses, & foundations)	Be sure to keep gifts anonymous if the donor requested it.
	Contact Information (ALL of it)	Mailing address, phone, email, website, Facebook, Twitter, etc.
	Meets Standards® Seal!	Use it or let people know you are currently in review.