

# Annual Reports Best Practices

Each year congregations are faced with the task of compiling their annual report for the previous year. While each community of faith will have its own presentation style, there are some best practices that will ensure the annual report is complete and easy to read.

## Contents:

Please ensure your annual report includes:

1. Table of Contents
2. Report from the Board of Trustees including property insurance details and report on investments
3. Financial report for the community of faith including income and expenses
4. Financial report from any groups which manage funds on behalf of the congregation, for example a youth group, special interest group, UCW, AOTS, social group, choir etc.
5. Operating budget for the coming year
6. Financial report for special projects such as a capital campaign
7. Mission and Service givings report
8. Audit/Review
9. Membership report showing the change in membership numbers, number of deaths, baptisms, weddings, and communion services. The number of adherents can also be reported.
10. List of current members on the governing body and trustees. Include dates if they have been elected for more than one year.
11. Nominating report for the coming year
12. Minister/Pastoral Charge Supervisor's Report
13. Other reports you may wish to include

## Other Considerations:

- Ensure that the annual report does not reveal personal information, such as phone numbers and email addresses unless you have obtained permission.
- A narrative budget may be a helpful way to discuss finances
- Is the tone of the annual report consistent? How does it tell the story of your ministry over the past year?
- Send a digital copy of the Annual Report to the Covenant Commission [LAllin@united-church.ca](mailto:LAllin@united-church.ca)