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How to Craft a Powerful Annual Report

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How to Craft a Powerful Annual Report

Using an annual report to earn public trust, advance key goals, and tell your agency's story

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To an oversight agency, an annual report is more than a financial statement. At the Office of the Inspector General (OIG) for the City of Philadelphia, we view our annual report as an opportunity to increase awareness of our office, to encourage public reporting, and to deter wrongdoing. Because most investigations originate from tips submitted by citizens, we see community engagement as critical to our success.

In our years of report writing, we have gained a lot of experience about what works and what does not work, and we have distilled that experience into six basic lessons for maximizing the impact of an annual report.

Tell a Compelling Story

A cohesive narrative is the bedrock of an effective annual report. Not only will it draw and sustain readers' attention, but it will also lend context, structure, and meaning to the content.

We began to write our [2015 annual report](#) at the height of Philadelphia's mayoral transition. Integrity was a core principle of the Nutter administration; with his support, our office took its place at the center of the integrity landscape of Philadelphia. To thank him for his investment in the OIG, we created an eight-year "progress report." Our narrative, "The Road to Reform," chronicled the OIG's evolution and its resounding impact on the City.

This storyline served several purposes. With the new administration came a wave of new appointees, some of them new to City government and possibly unfamiliar with our office. The eight-year retrospective allowed us to recap our history, showcase our biggest accomplishments, and make a strong case for their continued support.

Our story's "ending" was a prelude to the next chapter under Mayor James F. Kenney. We celebrated the OIG's significant progress along the road to reform, but acknowledged that our work is far from finished. This set the stage for our final call to action: amend the City's Home Rule Charter to fortify our office with complete operational independence.

Author:

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The mission of the [Office of the Inspector General for the City of Philadelphia](#) is to enhance the public's confidence in the integrity of the City government by rooting out corruption, fraud, misconduct, waste and mismanagement.

At a Glance

1. Tell a Compelling Story
2. Write Mindfully
3. Design for Impact
4. Present Measurable Achievements
5. Plan Year-Round
6. Make it Accessible

Write Mindfully

One of the most difficult, but important, steps in the writing process is deciding what to include and what to leave out. Our first order of business was to map out our content. We started by creating a list of benchmarks: important cases, initiatives, partnerships, and other moments that defined our success. With those building blocks in place, we then tied in basic elements—such as the introduction, letters from the Inspector General and Mayor, statistics page, and conclusion—to create a comprehensive outline. A storyline defines the overall structure of the report, shaping the content around a narrative thread and making it easier to identify and cut out information that does not actively move the story forward.

The messaging in an annual report is only as clear as the language in which it is presented. Our office follows three simple guidelines to ensure that writing is accessible and reinforces our agency’s credibility:

First, use plain language—clear, precise, and unambiguous writing. An annual report should read differently than internal materials and professional communications, as it is intended for a much broader audience. Agency communications, especially within government, are notorious for their dull, stilted language and legalese. An annual report should focus more on storytelling and avoid jargon and acronyms that may confuse a broader readership.

Second, maintain an unbiased position throughout the document. As a public entity, especially one focused on objective oversight, we are careful that our writing does not carry any political overtones. We are also vigilant to remain professional when presenting casework. While we are proud of our work, we are also sensitive to the potentially devastating personal consequences for the subjects of our disciplinary actions and criminal prosecutions.

Finally, as a face of the public integrity community, we are expected to uphold the highest ethical standards in all aspects of our work. An annual report should underscore commitment to transparency. Be honest about results: don’t inflate accomplishments or disguise losses and challenges faced.

THE ROAD AHEAD

As the Nutter administration came to a close, it was clear that the City’s commitment to good government would not waver. Mayor-elect James F. Kenney pledged to continue moving Philadelphia in the right direction, and one of his first orders of business was to ask Inspector General Kurland and her team to join his administration in the fight against fraud and corruption.

EXECUTIVE ORDER 7-14

In October 2014, Mayor Nutter issued Executive Order 7-14 to clarify the scope of the OIG’s jurisdiction and to recognize the office’s versatility. The office’s authority to investigate fraud and corruption had always been broad, but the executive order sought to outline in full detail what kinds of cases the OIG could pursue. The office’s jurisdiction extends to civil and criminal allegations of fraud and corruption lodged against City employees or direct recipients of City funds.

SCHOOL DISTRICT OF PHILADELPHIA

In January 2015, the School Reform Commission asked the OIG to review the School District’s Office of the Inspector General and offer recommendations to strengthen the agency. Inspector General Kurland will now oversee both OIG offices and has appointed Maryanne Donaghy as Chief for the School District OIG. Donaghy brings significant and diverse investigative experience to the position. She is a former certified public accountant and a former assistant U.S. Attorney. She previously served as General Counsel to the A.I. duPont Hospital for Children and as Deputy General Counsel of the Nemours Foundation.

ONGOING EDUCATION

The OIG has launched an ongoing educational campaign to help raise awareness about the importance of government integrity and to encourage members of the public to report fraud and corruption. In speaking to local community groups, the OIG aims to learn more about City residents’ concerns, build new collaborative programs and extend its investigative reach.

In collaboration with the Chief Integrity Officer, the OIG is also releasing a “Supervisor Toolkit” to educate new City supervisors about the importance of preventing, spotting and reporting potential wrongdoing.

To keep our pages readable, we used colored headings and short paragraphs, with sufficient white space in between.



Our report ends with a photo of both Mayor Kenney and Mayor Nutter, a caption that reads “Moving Forward,” and an infographic that conveys our total savings and recovery over the past eight years. This spread demonstrates our success under the outgoing mayor and makes a strong case for continued support.

Design for Impact

Strategic design is the key to engagement. Keep your report “scan-friendly”—readers should be able to leaf through the document and quickly find what they need. Here are a few simple design principles we used to improve readability:

- Devote most of the space to photos and other visual elements.
- Use headings and subheadings liberally.
- Leave breathing room and put a high value on white space.
- Keep text short.
- Follow a bold, contrasting, complimentary color scheme.
- Use colored text boxes, captions, and pull-out quotes to emphasize key areas.

The more photos, the better. Using large, vibrant, high-quality photos and detailed captions can reduce the amount of text needed. When possible, use real photos and anecdotes from people who have been positively affected by the agency's work. Balancing quantitative data with personal stories will bring depth to an annual report.

Other possible photo subjects include scenic views of the community, as well as staff, partners, constituents, and events. Use images that convey a sense of community and that position the agency as an approachable ally.

Present Measurable Achievements

Punchy statistics can bolster a report's narrative. Often, data gets mired in complex spreadsheets and charts. We use simple, bold infographics to present our data in a form that is both easily digestible and visually captivating.

Choose statistics that accurately capture the year's work and resonate with readers. To the extent that an agency can report financial accomplishments, like savings and recovery, these can be a great tool to demonstrate utility. But don't focus on financial results alone. Consider other performance indicators that are unique to your organization. For example, we chose to include the number of policy recommendation reports we released to improve internal controls and prevent fraud more proactively. As an organization that is founded on accountability, be sure to provide full disclosure of how quantitative results are measured. To avoid visual clutter, consider offering a more detailed calculation in a footnote or in the back of the report.



In 2011, we discovered more than \$100K in unused Verizon bonus points in an unauthorized corporate rewards account. The unused points were turned into gift cards to help [PhillyRising](#) purchase supplies to help revitalize the community. This picture illustrates the OIG's ability to enact positive change on a grassroots level.



We highlighted impressive statistics with salient infographics, dispersed throughout the report.

Plan Year-Round

Creating an annual report is not a short-term project. Having an organized system for collecting and tracking data during the year can significantly ease the writing process. But don't stop there—anticipate photo opportunities, catalog media clippings, and keep a running list of achievements. Be sure to save photos with the date, location, and photographer's information. For an agency concerned with integrity and professionalism, it is important to secure proper permission for images used and to provide full credit.

Whether you are producing the report in-house or hiring a design firm, the entire team should be involved in the curation process. Hold periodic team meetings to discuss individual and collective progress and provide updates to a working document that is accessible to everyone online. Besides bringing new perspectives to the annual report, including everyone in the office in the reporting process may help foster pride in collective achievements and help reduce barriers to inter-departmental collaboration.

If several people are contributing to the annual report, it is smart to identify one person as the project manager and one person as the main editor. This project manager is responsible for creating a production schedule and for holding the team accountable to those deadlines. The main editor stitches all of the contributions together and makes sure that the final writing is fluid and stylistically consistent.

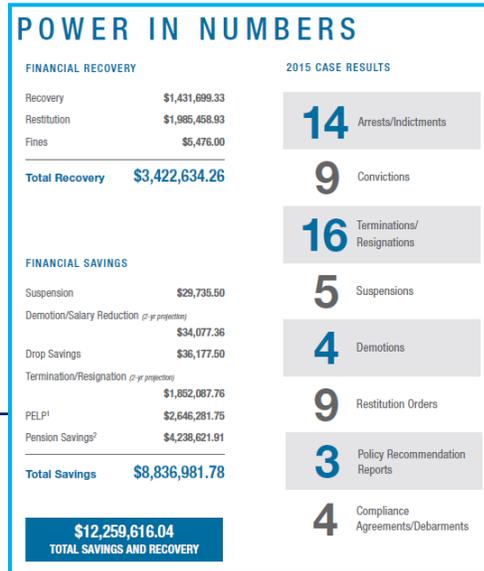
Make it Accessible

When the report is finished, decide what form of distribution will maximize its viewing potential. Consider the audience and their consumption habits—are they likely to read the annual report in hardcopy or in a digital format? Given our varied readership, we have opted to distribute our report both by mail and digitally. We first sent individual copies, accompanied by a personally addressed, hand-signed letter, to department heads, law enforcement personnel, and other important partners. This has proved to be a great way to maintain our existing relationships and introduce ourselves to new faces in City government. We also uploaded a (condensed) PDF version to our website, Facebook page, and Twitter account. Our work depends on active and open participation from community members, and we want to reach as many of them as possible.

Final Thoughts

The annual report is one of the most important projects that an oversight agency can undertake; after all, we must hold ourselves to the same standards of integrity, transparency, and accountability that we enforce. When done well, an annual report is a useful tool to demonstrate productivity, advocate for resources, heighten visibility, and build new partnerships. By combining the principles outlined above, an agency can make the most effective use of this opportunity and create an elegant, useful, and impactful annual report.

Links to our annual reports: [2013](#) | [2014](#) | [2015](#)



Our “Power in Numbers” page gives a statistical overview of accomplishments over the eight-year period. Contrasting colors and text boxes make facts stand out.

Integrity in Brief
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This publication is part of an ongoing series of contributions from practitioners, policymakers, and civil society leaders in the public integrity community. If you have expertise you would like to share, please contact us at CAPI@law.columbia.edu.

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