

How to Prepare Your Annual Report to the Assembly of Representatives and IPTA Members

Annual reports help you demonstrate our accomplishments to the IPTA members, cultivate new partnerships, and recognize important people.

The representatives to the IPTA Assembly expect that our elected or appointed leaders report on their initiatives and accomplishments each year.

Your annual report can

- communicate not only your activities, but also your accomplishments during the past year;
- help build participation in future events or fundraising activities;
- assure members that their membership dues are being well spent;
- educate members and decision makers about your work on important issues;
- recognize special people, including donors and volunteers; and
- serve as a historical record of your progress.

Most members say they want two simple things: to be thanked for their contributions (time, talent or treasure) and to see the results from their contribution. Your annual report should accomplish both things. They want to know that you are bringing about the kinds of changes they are expecting when they contribute their time or money to IPTA. This does not mean, however, that they are looking for the laundry list of everything that we did over the course of the year -- nor do they want to spend hours reading a report. They want the highlights.

Last year's activities	What the activity did or resulted in	What we accomplished as an organization
Held a Lobby Day in Springfield	Raised the visibility of the PT profession to our legislators	Established/developed relationships between members and legislators that will help us accomplish future legislative goals. Strategic Goal 2
Gave 12 presentations to prospective student members	Opened the eyes of PT/PTA students to how APTA/IPTA will help them in their studies and in their future profession	Helps the PT profession continue to grow and benefit from new members. Strategic Goal 1
IPT-PAC fundraiser at Annual Conference	Raised the visibility of the IPT-PAC and diversified our contribution base	Increased the financial stability of our PAC Strategic Goal 2

Doesn't it sound more impressive to say that we raised the visibility of the PT profession among the legislators instead of saying we held a lobby day? Or that we increased the financial stability of our PAC instead of just saying we held a fundraiser? It is important to focus on what the activity accomplished, not the activity:

The goal is to explain to members the value of the work you do.

Do you have a personal anecdote to add about how something that your committee/task force, district did impacted you or others? Any photos? Graphs that demonstrate success? Use them in your report.

And most importantly, give thanks and credit when due. Give your committee members/volunteers the sense that you are embracing them as partners in bringing about all of the year's accomplishments.

And close with a sneak peak at what's ahead. The majority of your report should focus on what has been accomplished (*remember -- not just the activities but what the activities accomplished!*), but sharing some future goals may encourage new volunteerism from those impressed with your past accomplishments. Never leave a potential volunteer hanging, wondering how they can help you. Once you've inspired them with the good works in your annual report, close by telling them how they can help you do more. How can they support you with their money or time?
Questions? Contact Colleen at cflannery@ipta.org.