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The Self-Taught Marketers Guide to Creating an Annual Report

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University of Maryland Baltimore, Health Sciences and Human Services Library   Everly Brown, MLIS, Head of Information Services   Patrick Waugh, MLS, Library Services Specialist   Tara Wink, MLS, Historical Collections Librarian and Archivist

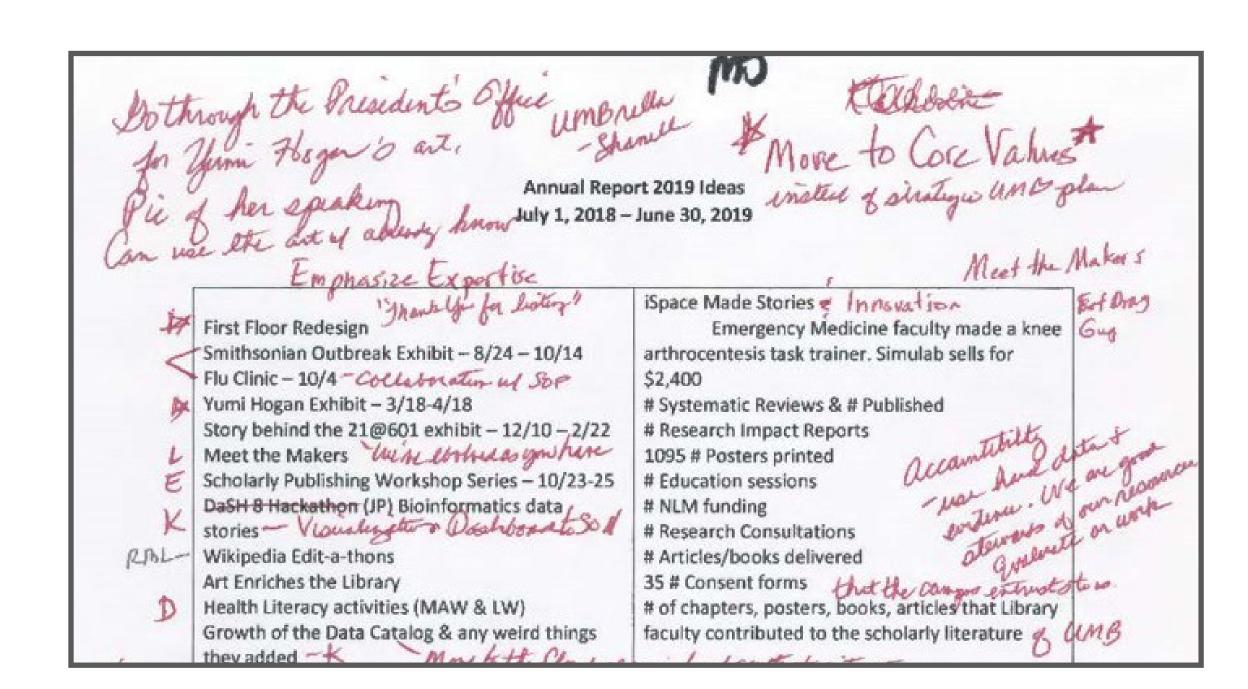# The Self-Taught Marketers Guide to Creating Annual Reports

Initial Charge

Produce an easy-to-read, visually appealing, 1-4 page annual report for the University of Maryland, Baltimore's Health Sciences and Human Services Library. The report should be a mix of interesting statistics, stories, quotes, and photographs to promote the HSHSL's accomplishments to the campus.

Project Goals

- Easy to read, visually-appealing report
- Showcase the HSHSL's value to campus
- Incorporate statistics and stories

Ideas and feedback for the FY2019 Annual Report

Methods

- Gather stories, statistics, and eligible material from the academic year
- Decide on the representation of short stories, long stories, statistics, timelines, photographs, and graphs
- Design layout of the annual report and decide on its length
- Write the stories, making sure to keep the language clear for non-librarians
- Share the draft report with Library leadership for feedback and edits
- Publish the report and share widely

Conclusions

The 2021-2022 academic year will be the fifth year producing an HSHSL annual report. Over time the committee has streamlined the process, improved content sourcing, and developed more sophisticated and modern layout designs. This achieved a quicker turn-around and required fewer iterations before the final product is released. As a bonus, we found other libraries have been inspired by our designs when creating their own annual reports.
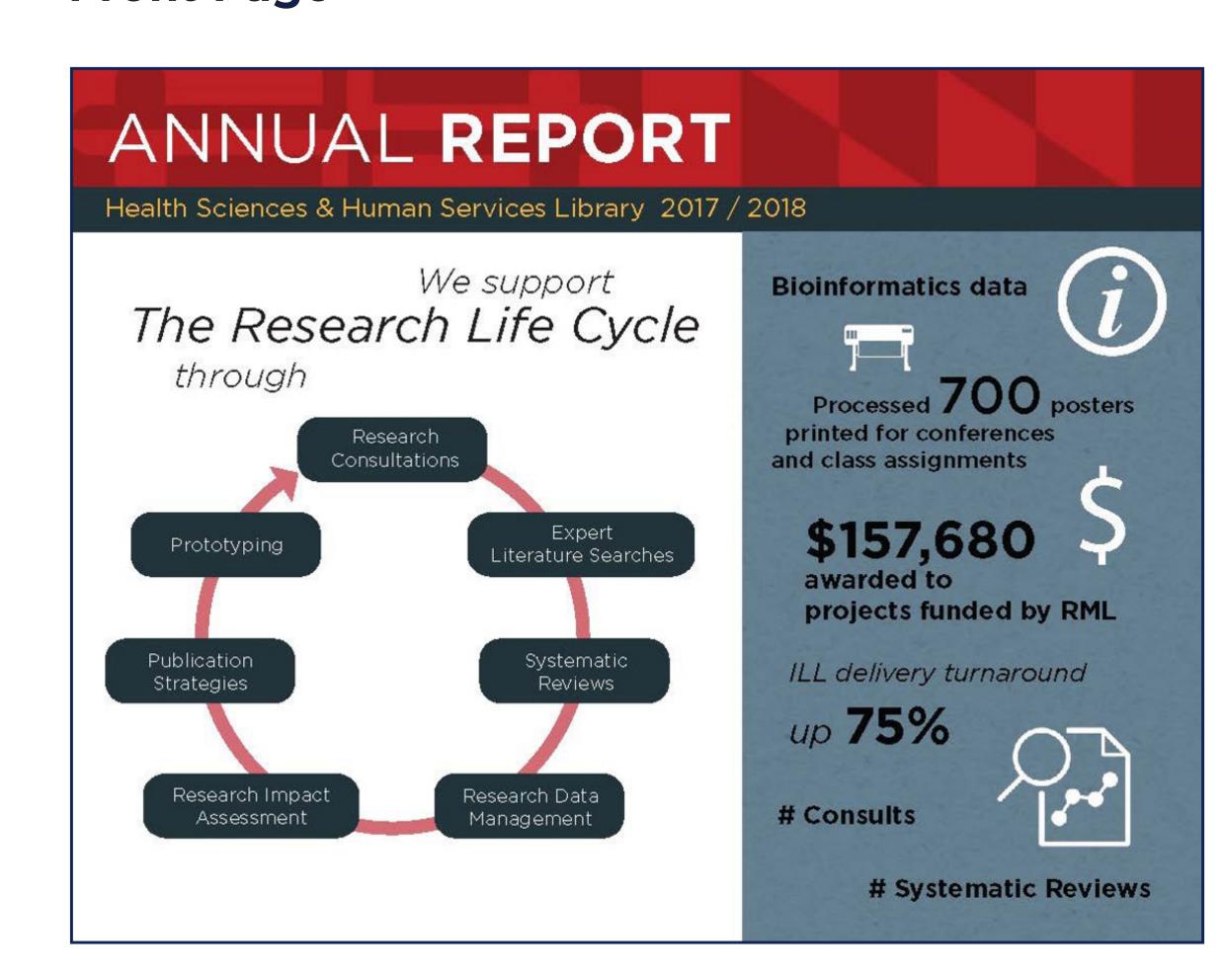
Lessons Learned

- Ask a core group of people for feedback
- Know when to stop editing
- Avoid library jargon
- Be strategic with numbers
- Play to the talents of your team
- Document, document, document
- Use personal touches
- Balance content and negative space
- Balance photos and text

Moving Forward

Our primary future goal is to assess the effectiveness of the yearly annual reports in order to better cater the document to our audience. Additionally, the committee hopes to increase the report's interactivity, allowing readers to compare statistics and stories over the years.

FY2018 Annual Report: From Start to Finish

Front Page

First draft. Feedback: Add more photos, get rid of "Life Cycle", change colors.
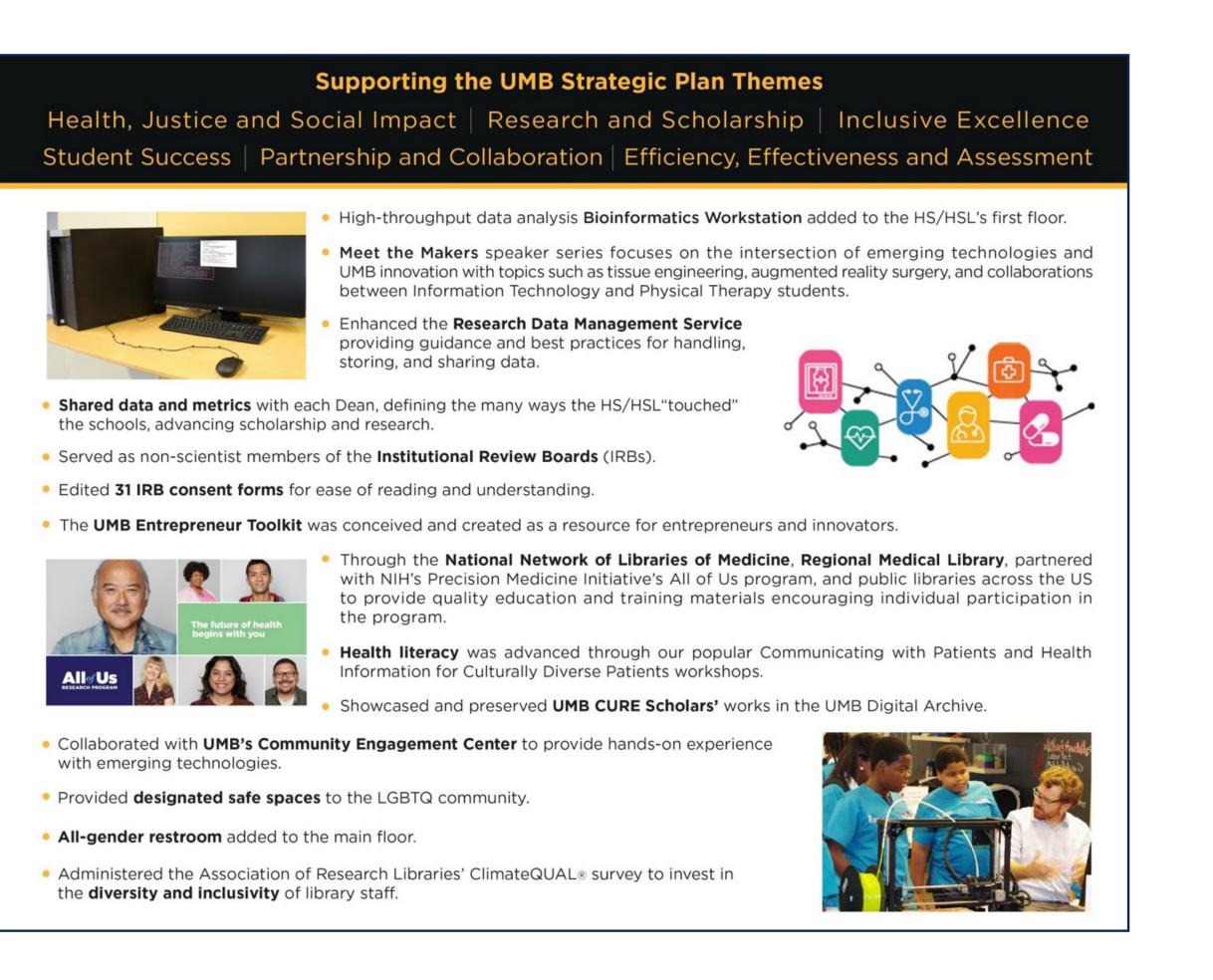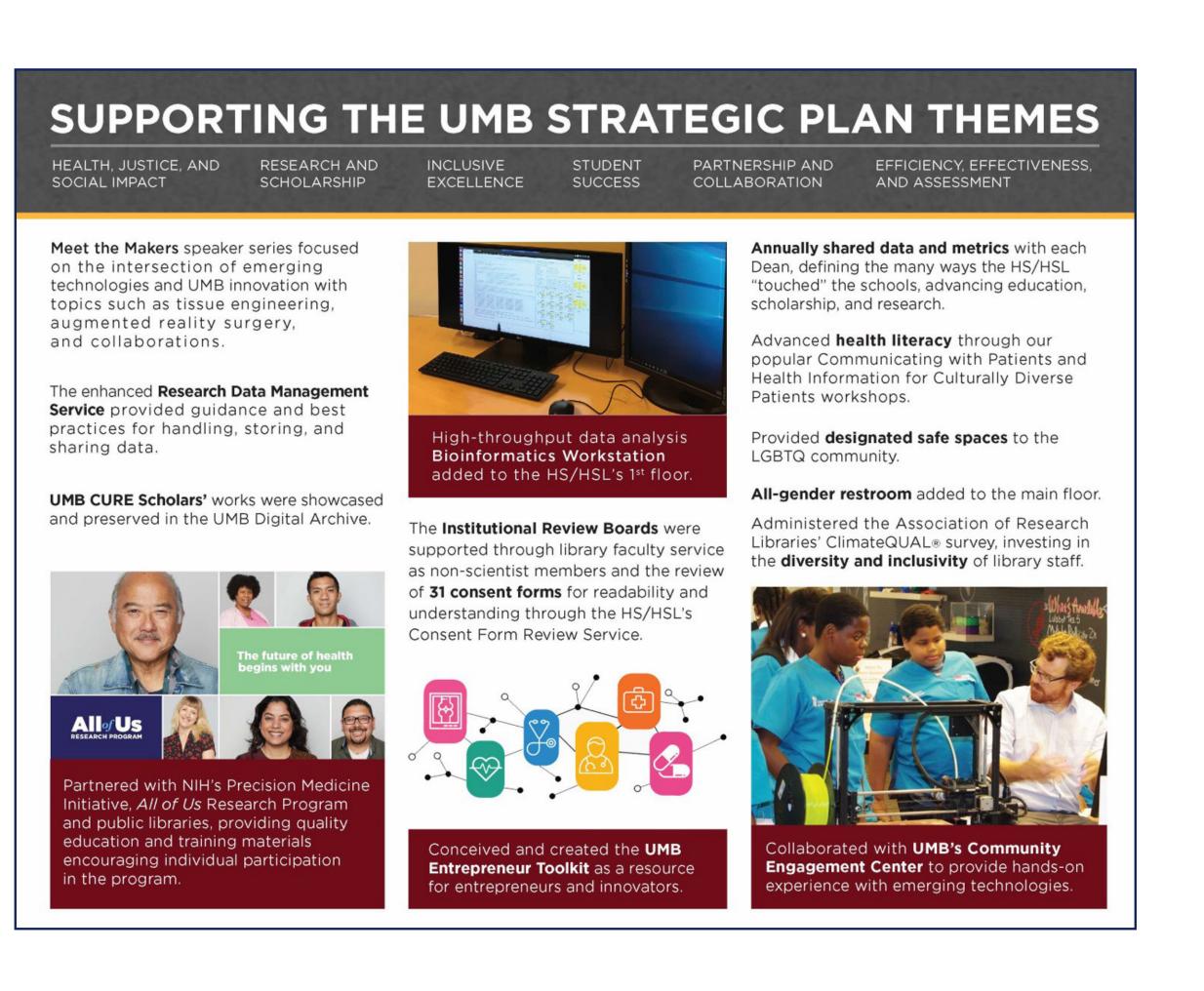

Later draft. Placeholder images in right column. Feedback: Change title background, get rid of black bar, break up text, change headers, make background gray lighter.

Final Front Page. Added more photos and illustrations. Text in left column curves around illustration.

Back Page

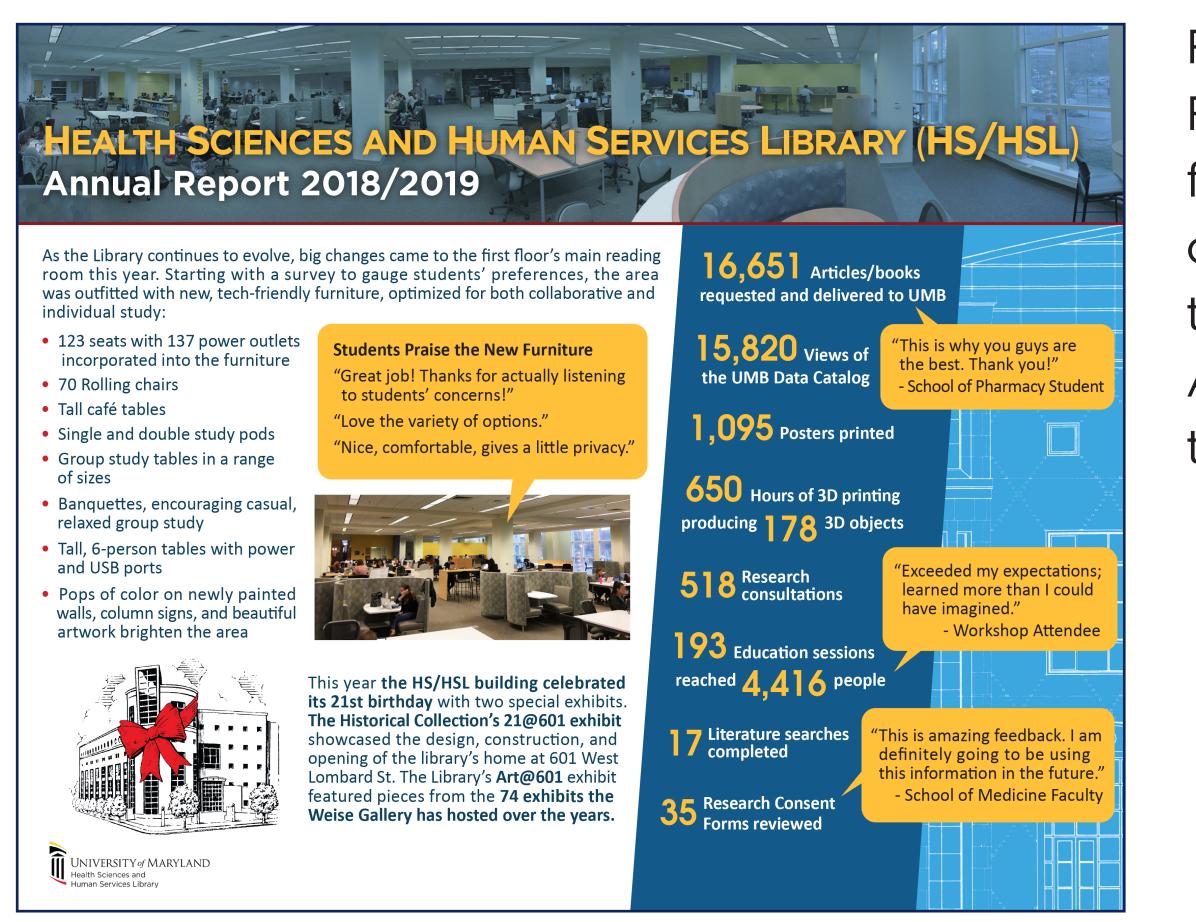Early draft. Feedback: Too much text, needs more photos.

Early draft. Feedback: Change color of title background, too dark, break up text, use different photo of computer.
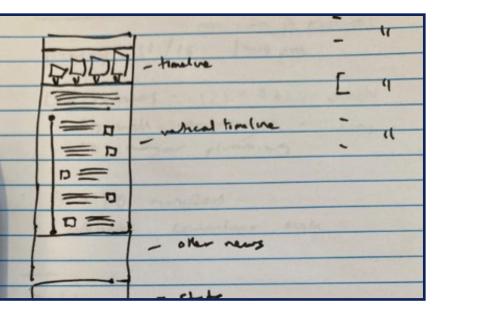

Final Back Page. Arranged text and photos in columns, made photos larger, added more color, slimmed down text.
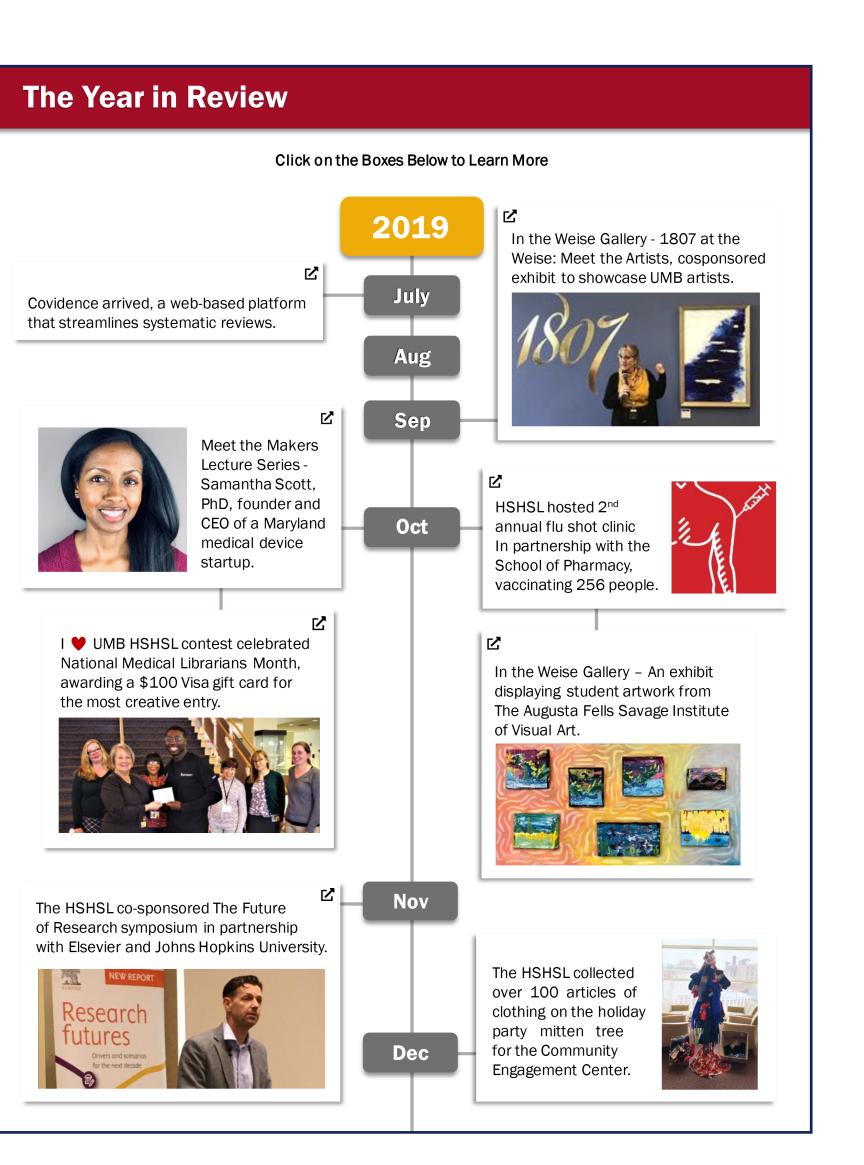
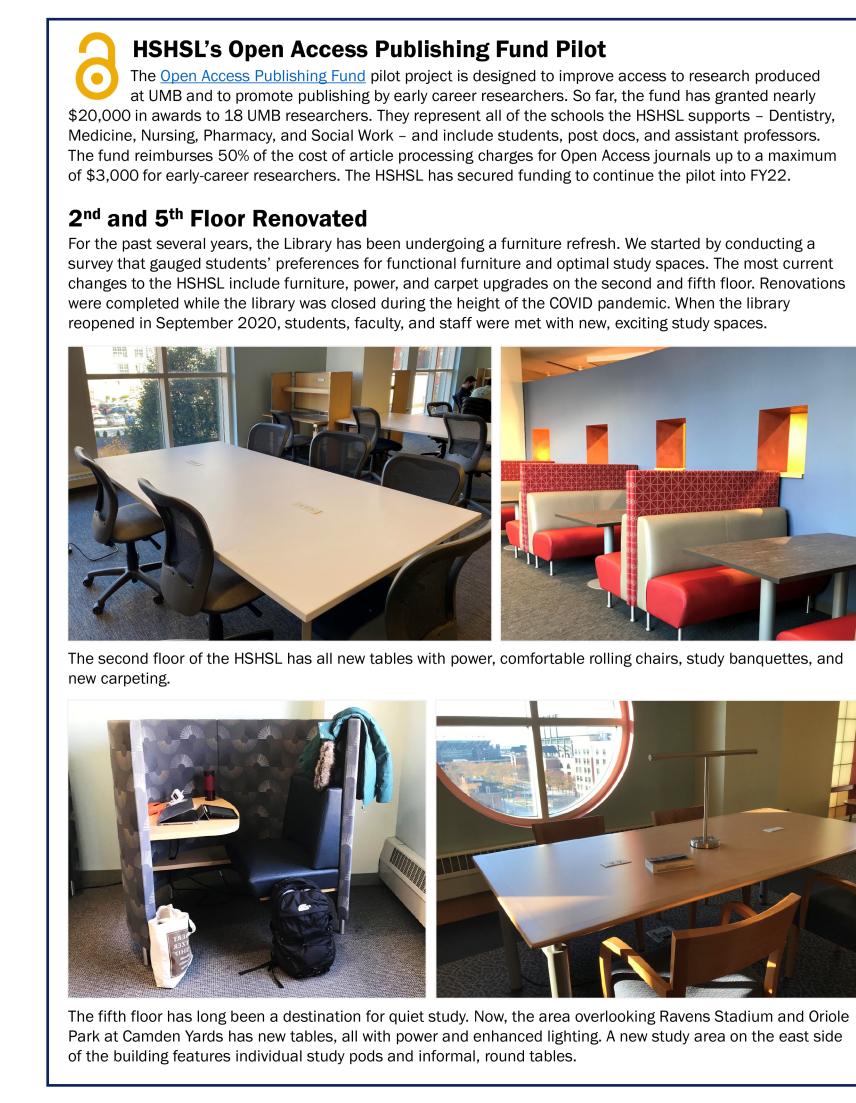## FY2019-2021 Annual Reports: Design Progression

FY2019 Annual Report First Page. Incorporated feedback to add more color, photos, statistics than previous year. Added quotes from the UMB community.

The design process for an annual report begins with simple sketches. The sketch to the left illustrates how a timeline could be used to organize events from the past fiscal year.

FY2020 Annual Report. Timeline boxes are hyperlinks to newsletters, blog posts, and UMB webpages.

FY2021 Annual Report. Responded to request for larger photos.