



WORLD'S FINEST® CHOCOLATE

ORGANIZER'S END OF YEAR CHECKLIST

Year-End Assessment

- Sincerely thank everyone involved with your fundraiser – appreciation goes a long way
- Survey volunteers and supporters – ask for feedback, tips for success, pitfalls to avoid, contact information for any vendors used, and ideas to make next year better
- Summarize accomplishments for the year – funds raised, events hosted, items purchased
- Share your results with everyone involved

Organize Your Files and Storage

- Organize membership forms, reports, receipts, financial files and other paperwork
- Toss out old paperwork, decorations, posters, signage, and expired food or beverages
- Create an inventory list of everything you have and tape it to the inside of the door or drawer

Organize Your Digital Files

- Compile photos and create albums of this year's fundraiser –upload to a cloud service
- Compile a list with login information of all social networks, email, and software you use
- Update internal forms, project lists, committee binder sheets, role descriptions, rosters etc.

Summer Planning

- Confirm summer building hours— know when your facility will be closed over summer months
- Verify if you will need access to files, copier, equipment, or meeting space inside the building
- Find out which volunteers / staff members will be traveling on vacation and plan accordingly
- Gently recruit for summer and early fall event volunteers
- Update flyers and displays over the summer to get prospects ready for next year
- Reserve rooms and meeting spaces for the fall

Get Affairs in Order

- Update signers on the organization's bank account
- Update the mailing address and email address for the organization's bank statement
- Renew any incorporations, website domains, licenses, and other subscription services
- Conduct a financial review/ audit and set up a preliminary budget for next year
- Have a close-out meeting with your fundraising specialist and set a date for next year
- If changing roles, meet with new member(s) to debrief them on duties and responsibilities. Provide organized files and all relevant information needed to succeed for next year.