

Year-End Checklist for Grantmakers

This checklist helps grantmakers organize and complete essential year-end tasks for a smooth transition into the new year.

1. Organizational Coordination

- ☐ Identify needs for Tax Department, Board, and Program Officers
- ☐ Communicate proactively to clarify expectations and deadlines

2. Data Integrity & Baseline Numbers

- ☐ Review and update all records for accuracy
- ☐ Use dashboards/search tools to establish baseline counts (organizations, requests, payments)
- ☐ Analyze year-over-year changes and trends

3. System Maintenance & Cleanup

- ☐ Run duplicate reports for organizations and contacts
- ☐ Merge duplicates and resolve missing codes
- ☐ Verify tax status for all organizations (ensure valid Tax IDs)
- ☐ Address unscheduled balances and missing data

4. Finalizing Records & Close-Out

- ☐ Review open grants and confirm all obligations are fulfilled
- ☐ Close out fulfilled grants and requirements; mark payments as paid
- ☐ Evaluate and resolve outdated pending requests

5. Budget Planning

- ☐ Plan, create, and allocate funds for the new budget year
- ☐ Track actual giving and payments against the budget
- ☐ Close the annual budget to finalize records

6. Reports & Dashboards

- ☐ Update dashboards and scheduled reports
- ☐ Review and clean up report titles and criteria
- ☐ Remove outdated or unused reports; save copies as needed

7. Templates & Reminders

- ☐ Review and update document templates (especially for automated reminders)
- ☐ Deactivate unnecessary reminders; verify sender information

8. Users & Permissions

- ☐ Review user lists; make inactive any users who have left
- ☐ Ensure user permissions and access are current

9. Views & Searches

- ☐ Create and maintain specialized views/searches for missing info or outstanding tasks
- ☐ Clean up and organize search/view lists

10. Continuous Improvement

- ☐ Schedule regular (monthly/quarterly) reviews and updates—not just annually
- ☐ Keep checklists and saved views accessible for ongoing maintenance