END OF FISCAL YEAR CHECK LIST

To make the most out of your year-end clean up here are **five things you should do before the fiscal year ends**.

CLEAN UP MESSY DATA

Keep your data management system clean and accurate by removing duplicate contacts or records and/or editing incomplete data. You may also need to archive contacts who no longer support your organization's mission or flag them as individuals to reconnect to. Cleaning up your data will help streamline it for future use and provide you with more accurate results when you create data or impact reports.

EVALUATE YOUR PERFORMANCE

Create, save, and export reports that highlight your performance over the past year. Look over the reports and make note of what will help you improve next year. If you have not been keeping records consistently, make a detailed list of your accomplishments and case studies for the year. This data will help you plan for your annual report and marketing materials to illustrate your impact to your partners, staff, board, and funders.

WRITE DOWN LESSONS LEARNED

Write down what worked really well this year and what flopped. Keeping a running list of lessons learned after each project or event and reviewing it prior to the next one will give you a sense of what to continue that adds value to your organization and what could be improved to achieve maximum impact.

ESTABLISH GOALS

Set goals that align with your organization's values and mission. Make sure your goals are SMART – Specific, Measurable, Attainable, Realistic, and Time-sensitive. Setting SMART goals will help your organization achieve its desired outcomes for the new year.

SET UP SYSTSM TO SUPPORT YOUR GOALS

Set up systems that will help you achieve those SMART goals and improve your overarching strategy for the next year. Those systems can be simple, such as customizing your data fields and writing a one page process sheet that outlines what data is collected, when and by whom. If you want to take your evaluation and self-assessment to the next level, your systems may also include researching and revising more in-depth data collection tools, such as pre-/post-surveys and activity based assessments, and setting up quarterly/semi-annual/annual reviews of the data from those evaluation tools to learn more about where you are successfully moving towards your goals and where you need a course correction. No matter the complexity, the goal is to mindfully work towards your goals through systems that make good habits as routine as brushing your teeth.

A successful year end clean-up will help you wrap up loose ends and plan ahead, setting a solid foundation for next year. Taking the time now to clean up your data, evaluate your performance, jot down lessons learned, establish goals, and set up systems to support those goals will make for a smoother transition into next year. And remember, if you get stuck in the process Arboreta Group offers free consultations to help!

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