



End-of-Year Survival Checklist for Development Professionals

Clarify Priorities

- ☐ Identify the *three* most important year-end revenue drivers.
- ☐ Confirm deadlines for mailings, email campaigns, grant submissions, and donor meetings.
- ☐ Communicate priorities to leadership to set expectations early.

Protect Your Calendar

- ☐ Block out focus time every week (non-negotiable).
- ☐ Reduce or decline non-essential meetings.
- ☐ Set daily “no email” windows for uninterrupted stewardship and writing time.

Strengthen Donor Stewardship

- ☐ Create a list of top donors who must receive a personal touch before year-end.
- ☐ Schedule all thank-you calls, handwritten notes, and impact updates.
- ☐ Confirm donor acknowledgment processes with finance/admin teams.

Prepare Leadership for Their Role

- ☐ Draft scripts or talking points for ED/CEO thank-you calls.
- ☐ Prep board members with a small, achievable list of outreach tasks.
- ☐ Provide templates for emails, call sheets, and follow-up.

Streamline All Communications

- ☐ Pre-write all year-end emails (Giving Tuesday, final week, Dec 31 reminder).
- ☐ Create a simple social media schedule that’s easy to execute.
- ☐ Ensure donation pages and auto-acknowledgements are updated and functioning.

Simplify Internal Processes

- ☐ Batch gift entry and acknowledgments to avoid daily chaos.
- ☐ Establish a clear handoff with finance for year-end reconciliation.
- ☐ Update your CRM tags and notes as you go to avoid January cleanup hell.

Communicate Your Capacity

- ☐ Tell your ED and board what you can accomplish, **and** what must wait.
- ☐ Provide a realistic forecast so expectations match reality.
- ☐ Ask for short-term help if needed (temp admin, volunteers, board support).

Set Personal Boundaries

- ☐ Commit to a hard stop time at least 3 days per week.
- ☐ Schedule your PTO now for early January.
- ☐ Turn off notifications after hours unless crisis-level issues arise.

Take Care of Your Mental and Physical Health

- ☐ Eat real meals, not just coffee and adrenaline.
- ☐ Build in two, 15-minute mental health breaks per day.
- ☐ Celebrate weekly wins, even small ones.

Celebrate Your Impact

- ☐ Make a list of accomplishments from the past year.
- ☐ Track donor wins, relationship growth, and new systems you built.
- ☐ Share impact metrics with leadership and the board to reinforce your value.