

Decisions for Leadership

Finish Strong, Start Ready: A Nonprofit's Guide to Q4 & 2027

PAYROLL & BENEFITS

Almost every people decision has a financial impact on next year's budget.

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|----|---|--------------------------|
| 01 | How will you respond to benefit rate changes? | ☐ |
| 02 | Are you changing plans or employer contributions? | ☐ |
| 03 | Are you providing year-end bonuses? If so, when? | ☐ |
| 04 | What salary changes take effect in 2027? | ☐ |
| 05 | Are any HR policies changing for the new year? | ☐ |
| 06 | Have I completed all of the necessary year-end compliance work? | ☐ |

FINANCE & ACCOUNTING

Finance and Development should work from the same number.

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|----|---|--------------------------|
| 01 | What assumptions are you making for 2027 revenue and expenses? | ☐ |
| 02 | What staffing or program changes need to be budgeted? | ☐ |
| 03 | Is the budget ready for board approval? | ☐ |
| 04 | Are there financial issues you need to address before year-end? | ☐ |
| 05 | Do Finance and Development agree on our fundraising numbers? | ☐ |

DEVELOPMENT OPERATIONS

Year-end shouldn't just end with... "We raised X dollars." Learn what worked for 2027.

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| 01 | How are you segmenting your donors for year-end appeals? | ☐ |
| 02 | What are your year-end fundraising goals? | ☐ |
| 03 | How will you measure campaign performance? | ☐ |
| 04 | Are our CRM and processes ready for increased activity? | ☐ |
| 05 | Who owns gift processing, acknowledgment and reconciliation? | ☐ |
| 06 | What should you carry forward or change in 2027? | ☐ |

