

# Ministry Brands®

# End of Year Checklist

## Giving & ChMS



### In Giving

- Clear Out Your Sync Report
  - Make sure all digital donations have synced over to your ChMS so that your giving statements and reporting will contain accurate giving history for all donors.

### In ChMS

- Database Cleanup
  - Find duplicate records
  - Export and remove records
  - How to handle deceased individuals
  - How to handle divorced or separated families
- Consolidate Family Giving History
- Check the Tax-Deductible Status of Your Funds
  - Make sure each of your contribution funds is listed correctly as tax-deductible or not.
  - Select the top menu gear icon, then select **Settings** → **Giving** → **Giving Options and Categories** to review each fund. You will see a column noting the Tax-Deductible status to the right of the **Active Categories** for each Category (Fund).
  - Simply click on the gear for any Category to change this status.
- Customize Your Giving Statements

Pro Tip: Did you know you can include Pledge Statuses in your Giving Statements? [CLICK HERE](#) to learn more!

- Do a Practice Run of Your Giving Statements
  - Try a practice run before sending the real statement. Pick a sample group and run statements for that group to check for issues.

# End of Year Checklist

## Giving & ChMS



- Send Giving Statements
  - [How to print statements for mailing](#)
  - [How to email statements](#)

Pro Tip: You can also assign your donors ChMS credentials to login and view their giving statements themselves. You can do this in a mass group or individually.

- Express Gratitude
  - Send personalized emails to donors, expressing gratitude for their contributions.
  - Consider using various channels such as email, mail, or even a public acknowledgment during a service.

Pro Tip: You can send mass email, text, and voice messages using your ChMS. [CLICK HERE](#) to learn more!

- Request Feedback
  - Request feedback from donors about their experience with the giving process.

Pro Tip: You can use the form builder within your Giving or ChMS platforms to [create a survey](#) for donors to complete.