

Church Year-End Giving Readiness Checklist

A free checklist from ChurchCreation.com

THE READINESS CHECKLIST

- ☐ A prominent GIVE button
- ☐ A dedicated year-end giving page
- ☐ Frictionless giving
- ☐ Multiple methods
- ☐ A recurring option
- ☐ The Dec 31 deadline, communicated
- ☐ Impact & a goal
- ☐ Year-end statements
- ☐ A #GivingTuesday + year-end appeal
- ☐ Financial transparency
- ☐ Thank-you automation
- ☐ A tested giving flow

MAKE GIVING FRICTIONLESS

- ☐ Keep Give visible in the nav and footer
- ☐ Allow guest giving — no forced account
- ☐ Offer recurring, text-to-give and QR codes
- ☐ Steer large gifts to ACH — far lower fees than card
- ☐ Turn on donor cover-the-fees before December

DEADLINES & RECEIPTS

- ☐ Card gifts generally deduct in the year the charge is made — flag the Dec 31 cutoff
- ☐ Mailed checks must be postmarked by Dec 31
- ☐ Send statements by Jan 31; single gifts of \$250+ need written acknowledgment
- ☐ Tax rules vary by gift type — tell donors to consult a professional

The campaign timeline

Early–mid November	Set the goal, build the page, test the giving flow
#GivingTuesday (early Dec)	Launch with an impact story and a matching gift
Mid-December	Progress update and a matching push
Final week / Dec 31	Give-before-midnight deadline messaging
January (by Jan 31)	Automated thank-yous and tax statements