Contribution Statements

(the full buffet – Part 1)

simple

Ben Murphy

Contribution Statements
who is involved in this process / set up?

- Finance Team
- Organization Leadership
- Stewardship Pastor
- Communications Team
- Rock Admin(s)

simple

Ben Murphy

The Menu (appetizers)

- Data Integrity (Finance Team and Rock Admin(s))

  - Pending Persons

  - Duplicate Finder

  - Deceased Persons

  - Children with Giving

  - Children sharing GivingGroupId w/ Parents

The Menu (entrees)

- THE BIG TRANSITION ON STATEMENTS Legacy (pre v12.5) vs Current blocks (v13+)

  - Impersonation settings internal versus external

- Protection Profiles (security for tokens and contribution statement blocks)

- Non-cash/traditional gifts

  - IRAs/QCDs/Stock/non-asset giving

  - Business giving

The Menu (lunch specials)

- Electronic vs Physical statements

    - Key Set up Considerations

    - Setting up dynamic LY and TY communication templates

        - Attachments or Cover letters

        - Creating a tokenized link with time constraints

    - Setting up Data Views

        - Checking for valid email/mailing addresses

The Menu (desserts)

- Custom Layout Examples

  - HTML vs Print

- Quarterly statements

- How Contribution Statements can drive Stewardship and Discipleship opportunities

  - Why to send prior to end of year

Contribution Statements

(the full buffet – Part 2)

simple

Ben Murphy

The Menu (appetizers)

- Data Integrity (Finance Team and Rock Admin(s))

  - Pending Persons

  - Duplicate Finder

  - Deceased Persons

  - Children with Giving

  - Children sharing GivingGroupId w/ Parents

Appetizers
(data integrity)

- **! Preparing your Rock person records is critical to having a successful contribution statement delivery !**

- **Pending person records** should be the first line of attack. Duplicates are first issued as new pending records. Reduce this list first

- **Duplicate Finder** identify and merge **after** all pending records treated

- **Note:** If dupes aren't dealt with, multiple records with the same primary email can cause havoc with tokenized links

Appetizers
(data integrity)

- **Deceased Givers** from previous year

  - Create a data view for this. Ensure that all prior gifts have been moved to the spouse prior to sending. Has the deceased individual been moved out of the family? Any active recurring gifts?

- **Children with Transactions** or in the same Giving Group as Parents

  - Adult children living with parents. Do they need to stay in the same family group?

  - **Recipe link**

- **Salutation Cleanup** or removing the First Name properties with &, and, etc.

  - **Recipe link**

The Menu (entrees)

- THE BIG TRANSITION ON STATEMENTS Legacy (pre v12.5) vs Current blocks (v13+)
  - Impersonation settings internal versus external

Entrees

(the big transition on giving statements)

Why was there a change? Previously (< v12) Contribution Statements in Rock had to be defined in separate lava templates for Electronic vs Print

Entrees

(the big transition on giving statements)

You just upgraded to Rock v13+ and are trying to pull up an individual statement internally, but it's only showing YOUR OWN personal statement

HELP!!!

Entrees
(the big transition on giving statements)

2 major blocks were replaced between v12 and v13:

Contribution Statement List Lava -> Giving Configuration

- These blocks listed the statements with buttons by year

- The old block does not properly handle the impersonation to the new Statement Generator block for the internal Contribution Statement page

Contribution Statement Lava (Legacy) -> Contribution Statement Generator

- The Statement Generator block must be used with the new Financial Settings – Contribution Templates (uses Person Guid for impersonation)

Entrees
(the big transition on giving statements)

Now in v13+ all statements are driven by one lava template found in a new page

Finance – Financial Settings – Contribution Templates

PRO TIP! Create a new Contribution Template and base it off the Rock Default template. Do not use the Rock Default template as your own. Keep it as a point of reference or backup only

Contribution Statements

(the full buffet – Part 4)

simple

Ben Murphy

The Menu (entrees)

- Non-cash/traditional gifts
  - IRAs/QCDs/Stock/non-asset giving
  - Business giving

Entrees
(IRAs, QCDs, Stock Gifts)

- In some cases, you'll find that a person will only give in this way, not having a single regular charitable contribution to a normal church fund. Currently the Rock statement generator won't show the statement button, nor will it return results for only these types of gifts

- To fix this challenge you must create at least one $0 contribution transaction associated with that person of type cash or check into a normal tax-deductible fund. You'll need at least one of these types of "placeholder" gifts for each year that they have other giving but no regular contributions
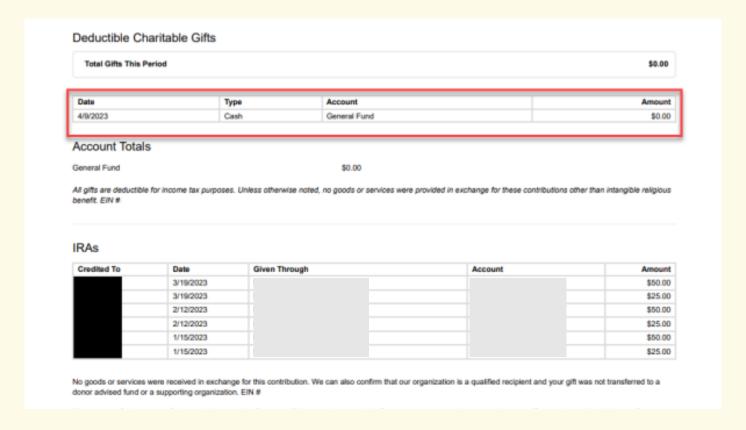
Entrees
(IRAs, QCDs, Stock Gifts continued)

Statement template example

with no regular giving

Note: You must create at least

one $0 tax-deductible

contribution.

Creating a transaction for $0 is disabled
specifically in Rock v13.7 but has been corrected
in v14.1; upgrade to regain this capability

See issue for details

Deductible Charitable Gifts

Total Gifts This Period	$0.00

Date	Type	Account	Amount
4/9/2023	Cash	General Fund	$0.00

Account Totals

General Fund	$0.00

All gifts are deductible for income tax purposes. Unless otherwise noted, no goods or services were provided in exchange for these contributions other than intangible religious benefit. EIN #

IRAs

Credited To	Date	Given Through	Account	Amount
	3/19/2023			$50.00
	3/19/2023			$25.00
	2/12/2023			$50.00
	2/12/2023			$25.00
	1/15/2023			$50.00
	1/15/2023			$25.00

No goods or services were received in exchange for this contribution. We can also confirm that our organization is a qualified recipient and your gift was not transferred to a donor advised fund or a supporting organization. EIN #

Entrees
(IRAs, QCDs, Stock Gifts continued)

- **IRA/QCDs Qualified Charitable Distribution (a check from an IRA)** can be added as a specific Currency Type that needs to be displayed separately then you can adjust the template lava accordingly

  Stock gifts can be applied as a specific currency type. Typically, you wouldn't show the amount of the gift as it'd differ from when the stock was converted from whenever the church received the gift.

  My suggestion is to hide the amount here and list the issuer such as Wells Fargo, Vanguard, etc. instead

Entrees
(Business Giving, Soft Credits)

- **Business statements** should be relatively straightforward, identical to any individual giving statements. The only difference is if you want to do soft-crediting as previously mentioned

- **Soft Credits** can be set up with a new Entity Attribute on Financial Transaction Detail field type of Person with a key like 'softcreditfor' or 'softcreditedto' in order to denote whom this detail should be attributed towards. Typically, it's a gift from a Business record that gets soft-credited to a regular Person Record. Many times, the amount is hidden in the statement. This is easy to change in the template lava

  9Embers Soft Credits Plugin

Entrees
(IRAs, QCDs, Stock Gifts continued)

Statement template example

of alternate currency types

IRAs

Credited To	Date	Given Through	Account	Amount
▮▮▮▮▮	11/6/2022			

No goods or services were received in exchange for this contribution. We can also confirm that our organization is a qualified recipient and your gift was not transferred to a donor advised fund or a supporting organization. EIN #

Please note: If this is a qualified charitable deduction from your IRA, it may be excludable from your normal taxable income. However, if you exclude this distribution from income you should not also claim a charitable deduction for this distribution. Please consult with your tax advisor regarding the tax treatment of your contribution in your particular situation.

Soft Credits

The following organizations gave to East Cooper Baptist Church on your behalf. Giving details will be reported on their statements.

Credited To	Date	Given Through	Account
▮▮▮▮▮	8/7/2022		
	5/8/2022		
	5/8/2022		
	2/13/2022		

Thank you for your faithfulness to ▮▮▮. You are a vital part of what God is doing
through these ministries. If any errors appear, please contact the church Finance Office at ▮▮▮.

Contribution Statements

(the full buffet – Part 5)

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Ben Murphy

Contribution Statements
who is involved in this process / set up?

- Finance Team
- Organization Leadership
- Stewardship Pastor
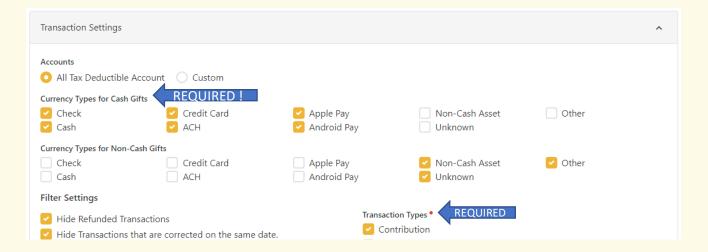- Communications Team
- Rock Admin(s)

simple

Ben Murphy

The Menu (lunch specials)

- Electronic vs Physical statements

  - Key Set up Considerations

  - Setting up dynamic LY and TY communication templates

    - Attachments or Cover letters

    - Creating a tokenized link with time constraints

  - Setting up Data Views

    - Checking for valid email/mailing addresses

Lunch Specials
(key setup considerations)

- The Contribution Statement Currency Type or Cash and Non-cash gift multi-select is the one area where **you must select something here in order to display any transactions in a contribution statement**

Lunch Specials
(dynamic data views)

- Set up a previous year (LY) and a current year (TY) data view of families that have given > $0 for electronic, or >= $250 for physical mailing statements (suggested)

- Create helper DVs or Filter Groups to ensure that all electronic statements are going to persons with a valid email. Rock will not send to those set to inactive or Do Not Send, but it's better to know up front how many valid statements you'll be able to send, and to whom you cannot

Lunch Specials
(dynamic data views continued)

- **DV 1:** Sets the min amount, giving as family*, accounts, and time period

- **DV 2A:** Email (should cover 92-98% of your congregation)

  - Only persons with valid, active email not marked as Do Not Send

- **DV 2B:** Physical Mailing (should be the remaining 2-8%)

  - Only persons with valid physical addresses, Email marked Do Not Email or Email Not Active
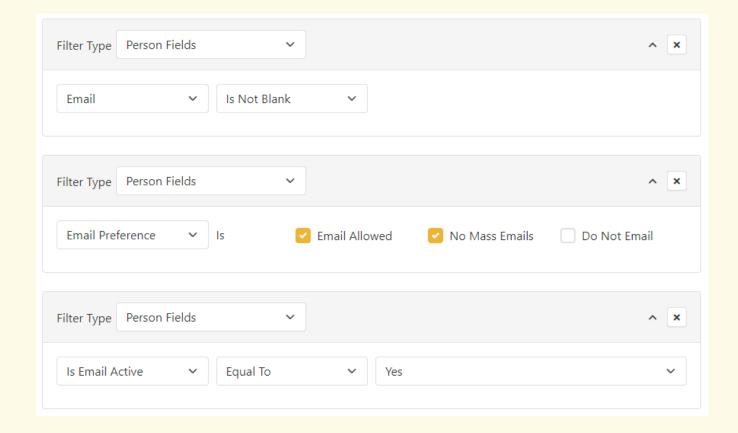
Lunch Specials
(dynamic data views continued)

- Between DV2A & 2B, you must adjust DV 1 for the min amount and/or time period

    - Physical mailing min amount can be adjusted to $250 (suggested).

    - ! If setting a higher min amount threshold, Combined Giving on the STEP 1 DV should be selected !

PRO-TIP! Because a financial statement is not marketing material, it does not apply to the CAN-SPAM Act. Turn off the "bulk" setting when emailing out statements
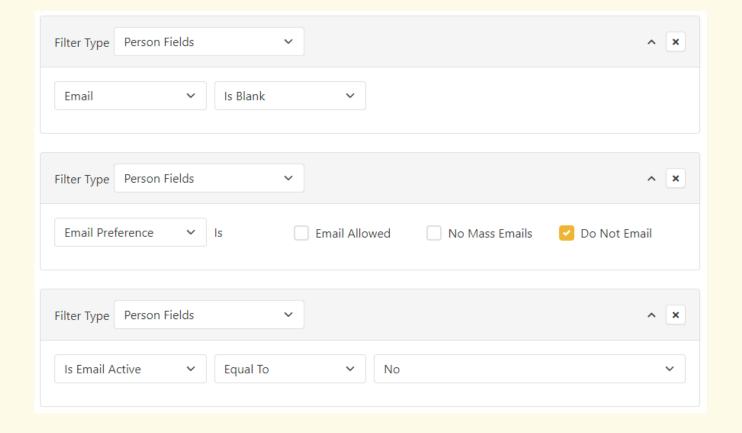
Lunch Specials
(data views – valid emails filter group)
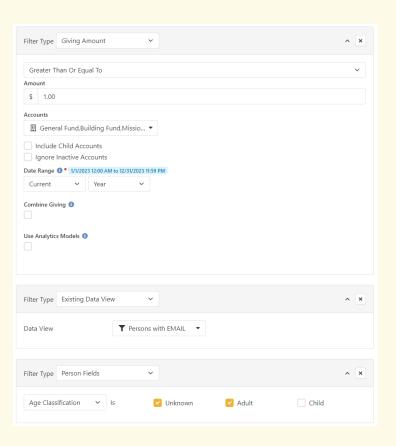
Used in the 2A – Emailing

statement Data View

Lunch Specials
(data views – no email filter group)

Used in the 2B – Physical Mailing

statement Data View

Filter Type	Person Fields ⌄			^ ✕

Email ⌄	Is Blank ⌄

Filter Type	Person Fields ⌄			^ ✕

Email Preference ⌄	Is	☐ Email Allowed	☐ No Mass Emails	☑ Do Not Email

Filter Type	Person Fields ⌄			^ ✕

Is Email Active ⌄	Equal To ⌄	No ⌄

Lunch Specials
(data views – email all)

You may use filter groups within the

Email of Physical Mailing DVs or you

can use them as separate "Helper

DVs" and add as an Existing Data View

filter type

The Menu (desserts)

- Custom Layout Examples

  - HTML vs Print

- Quarterly statements

- How Contribution Statements can drive Stewardship and Discipleship opportunities

  - Why to send prior to end of year

Desserts
(dynamic email templates)

- Utilize lava for all dating to avoid the mistype (it will happen). Create a dynamic previous year (LY) and current year (TY or CY) template

- Use an email attachment as a "cover letter" and to celebrate what God has done through the church in the body of the statement email prior to the link. These attachments or inline messages will help transition leaders that are hesitant to go electronic statements as the primary delivery vehicle

Desserts
(dynamic email templates continued)

- Example:

Contribution Statement - LY	{{ 'Now' | DateAdd:-1,'y' | Date:'yyyy' }} Contribution Statement and Financial Update from {{ 'Global' | Attribute:'OrganizationName' }}
Contribution Statement - TY	{{ 'Now' | Date:'yyyy' }} Contribution Statement from {{ 'Global' | Attribute:'OrganizationName' }}
Contribution Statement - TY (Quarterly)	{{ 'Now' | Date:'yyyy' }}-Q1 Contribution Statement from {{ 'Global' | Attribute:'OrganizationName' }}

Desserts
(dynamic email templates continued)

Test, test, test!

Prior to sending out hundreds if not thousands of electronic statements, test the tokenized link in previewer (open in private window). Send tests to internal staff. Check all variations of giving scenarios

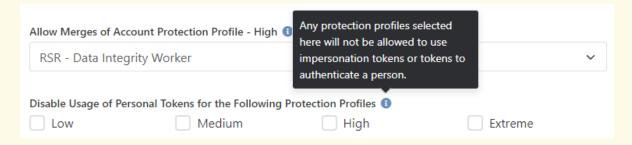# Desserts
(dynamic email templates continued)

- `View My {{ 'Now' | DateAdd:-1,'y' | Date:'yyyy' }} Statement`

- Update PersonTokenCreate to **PersonActionIndentifier:'contribution-statement'**

Entrees
(protection profiles with giving statements)

There is an undocumented lava filter **PersonActionIdentifier:'contribution-statement'** which should now be used in the sending of Electronic Statements via email. Action Identifiers will work regardless of your Security Protection Profile settings as shown below:

Anyone with High/Extreme profiles may not get a properly formatted tokenized link to their statement depending on your v13+ Security Settings and standard rckipid token usage:

Entrees

(protection profiles with giving statements)

The new Statement Generator block now requires **&PersonGuid={{ PersonGuid }}** in the url of any custom links if relying on the older "somewhat legacy" Contribution Statement Lava List block

Note: Ensure that the block you are using has the Context entity set to **Person**
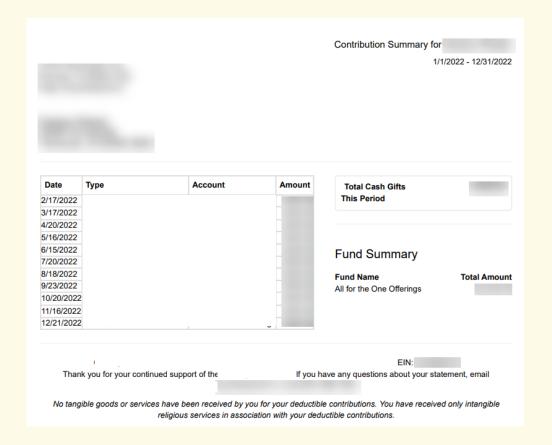
Desserts
(statement templates)

- With the new templates in v13+ unique HTML or Print layouts can be done in lava in one place

- Any unique layouts needed for print using the external Window statements generator app, must utilize "old-skool" tables for layout purposes

Desserts
(statement templates continued)

Unique template example:

- 2 columns

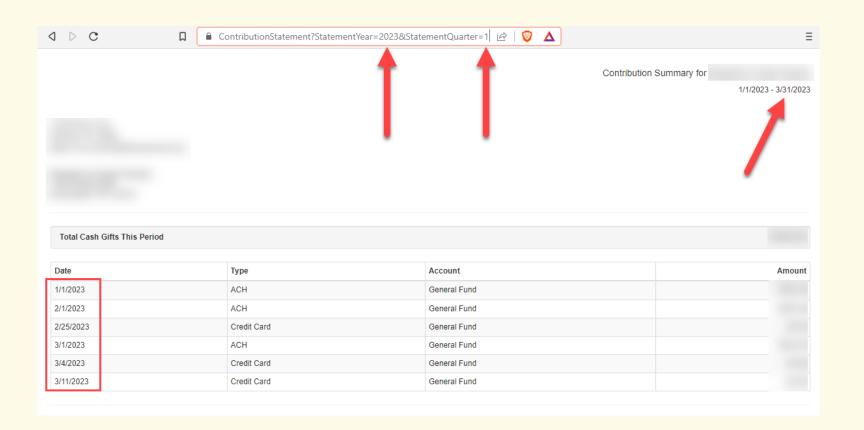- saves paper

Desserts
(quarterly statements)

- The problem: Today the legacy Contribution Statement Lava block and the new Statement Generator block only has 1 page parameter available related to **year**
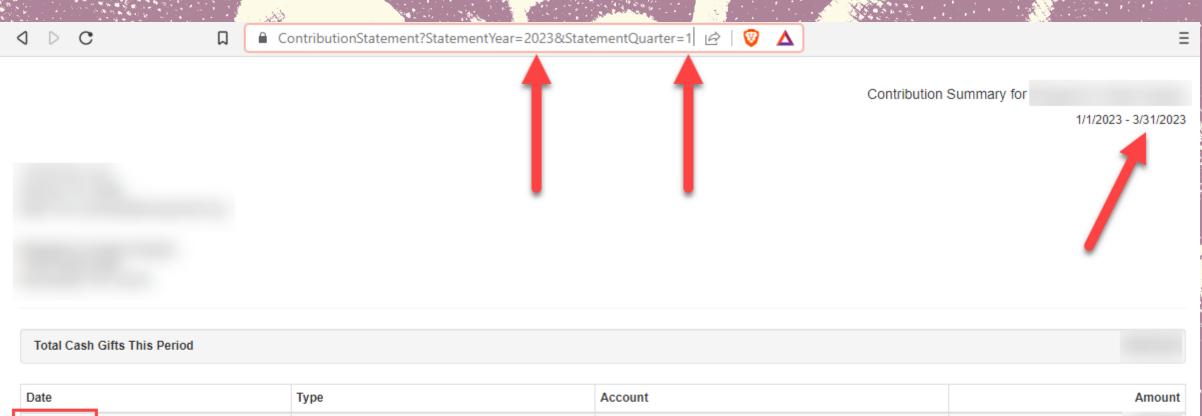
- The solution: In both blocks the month value is available and can be used for an additional page parameter, ie. &StatementQuarter= (but this requires forking the block today)

- Better yet, vote for this **Idea**

Desserts
(quarterly statements continued)

- Requires a feature update to the Statement Generator block to add an additional page parameter to capture the statement month

- All transactions are cumulative from start of year to end of month (EOM)

- Dynamic quarterly statement buttons can be created internally and externally on Giving History

Desserts

(quarterly statements continued)

Contribution Summary for

1/1/2023 - 3/31/2023

Total Cash Gifts This Period	

Date	Type	Account	Amount
1/1/2023	ACH	General Fund	
2/1/2023	ACH	General Fund	
2/25/2023	Credit Card	General Fund	
3/1/2023	ACH	General Fund	
3/4/2023	Credit Card	General Fund	
3/11/2023	Credit Card	General Fund	

Desserts
(quarterly statements continued)

```
{% assign currentYear = 'Now' | Date:'yyyy' %}
{% assign currentMonth = 'Now' | Date:'M' %}

{% if currentMonth and currentMonth < 4 %}
    {% assign currentQuarter = 1 %}
{% elseif currentMonth >= 4 and currentMonth < 7 %}
    {% assign currentQuarter = 2 %}
{% elseif currentMonth >= 6 and currentMonth < 10 %}
    {% assign currentQuarter = 3 %}
{% elseif currentMonth >= 9 and currentMonth <= 12  %}
    {% assign currentQuarter = 4 %}
{% else %}
    {% assign currentQuarter = 4 %}
{% endif %}
```

Available Contribution Statements

| 2023 YTD | 2022 | 2021 |

Quarterly Contribution Statements

| 2023-Q1 | 2023-Q2 |

| 2022-Q1 | 2022-Q2 | 2022-Q3 | 2022-Q4 |
| 2021-Q1 | 2021-Q2 | 2021-Q3 | 2021-Q4 |

Desserts
(quarterly statements continued)

```
{% for statementyear in StatementYears %}
    {% if currentYear == statementyear.Year %}
        {% assign quarters = "1,2,3,4" | Split: "," %}
            {% for i in quarters %}
                {% assign quarter = i %}
                    <a class="btn btn-primary my-2" href="{{ DetailPage }}?StatementYear={{ statementyear.Year
}}&StatementQuarter={{ quarter }}&PersonGuid={{ PersonGuid }}">{{ statementyear.Year }}-Q{{ quarter }}</a>
                    {% if i >= currentQuarter %}
                    {% break %}
                {% endif %}
            {% endfor %}<br>
    {% else %}
        {% assign quarters = "1,2,3,4" | Split: "," %}
            {% for i in quarters %}
                {% assign quarter = i %}
                    <a class="btn btn-default my-2" href="{{ DetailPage }}?StatementYear={{ statementyear.Year
}}&StatementQuarter={{ quarter }}&PersonGuid={{ PersonGuid }}">{{ statementyear.Year }}-Q{{ quarter }}</a>
                    {% if i > 4 %}
                    {% break %}
                {% endif %}
            {% endfor %}<br>
    {% endif %}
{% endfor %}
```

Contribution Statements

| 2023 YTD | 2022 | 2021 |

Quarterly Contribution Statements

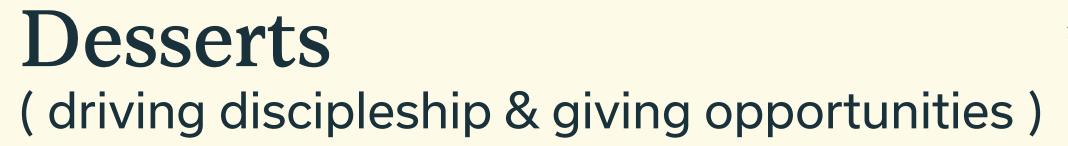| 2023-Q1 | 2023-Q2 | | |
| 2022-Q1 | 2022-Q2 | 2022-Q3 | 2022-Q4 |
| 2021-Q1 | 2021-Q2 | 2021-Q3 | 2021-Q4 |

Desserts
(driving discipleship & giving opportunities)

1. Send them out quarterly, prior to end of year at minimum

2. Include a cover letter that describes ministry impact and life change

3. Include pastoral/elder contact information and detail in the cover letter

4. Personalize, personalize, and personalize

5. Remind your church of the different ways they can give

6. Include previous year giving levels to date and current giving levels to date on the contribution summary statement

- Reference: **https://blog.horizons.net**

Desserts
(driving discipleship & giving opportunities)

- Sending out semi-regular statements throughout the year, quarterly or at minimum prior to end of year, gives the opportunity for personal connection:

  - It allows the church to show the many ways their giving has grown the body of Christ in the church, locally in the community, and throughout the world with missions

  - It also shows a giver how their part plays into that bigger picture of the church's kingdom building progress for the year

Desserts
(driving discipleship & giving opportunities)

- Sending out semi-regular statements throughout the year, quarterly or at minimum prior to end of year, gives the opportunity for personal connection:

  - It shows their current progress versus what they may have recalled in prior years, which they can get to in Giving History. And also shows current progress if they've committed to anything via pledges

  - Sending out electronic statements does not "cost" the church anything (minimal time/effort), depending on your email transport

Night Cap
(just wait, there's more)

- Contribution Statements are going to be done uniquely for every church or organization. Know your community and adapt as needed

- Make them memorable yet forgettable:

  - They should know they received it and that it included valuable information on the church's work and growth

  - It should be a seamless experience for all givers, and they shouldn't have to think about how to retrieve it, understand it, print it, and follow up on it if the need arises

Night Cap
(just wait, there's more)

- The Rock community is what makes this all happen

- You are loved!

Resources

- [Preparing Records for Contribution Statements Recipe](#)
- [Using Excel for Mass Cleanup of Data Recipe](#)
- [Email Your Contribution Statements Recipe](#)
- [9Embers Soft Credits Plugin](#)
- [Vote for Quarterly Statements Rock Idea](#)
- [Driving Discipleship with Giving Statements](#)

simple

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