

## YEAR END CHECKLIST

### FINANCIAL

- Redeem Credit card points if you have them. Use them as staff bonuses or just realize as revenue.
- Review and prep your 1099 list. Send 1099-NEC forms to independent contractors you paid more than \$600.
- Make sure pastors set housing allowance amounts for next year. [Here's a great worksheet from ECFA.](#)
- New W-4 for employees if they had a change in status
- Prep Annual Contribution statements – required for anyone who gave \$250 or more but a good idea to send to everyone. Plus, use this as an opportunity to say thanks cast vision for the future.
- Process any reimbursements from staff, leaders, or volunteers
- Evaluate all recurring expenses

### COMMUNICATION

- Year End Giving Letter, Email, or Campaign. We've got samples in the [Church Fuel members Resource Library.](#)
- Write a pastoral Year in Review email, post or letter. You can include it with your giving statements, use in your annual report, or post to your website.
- Social Media Recap – repost your 12 most helpful or engaging posts, highlight 12 volunteers, or someone's 12 favorite sermons.
- Call key volunteers, leaders or donors just to say Merry Christmas
- Send thank you notes to as many people as possible.
- Put together an annual report
  - Check examples and templates here.
  - Run reports and get numbers
  - Collect stories and testimonials

### LEADERSHIP

- Conduct staff evaluations. Here's a [process and a template you can follow.](#) If you don't have time to conduct them before the end of the year, put them on your calendar for January.
- Complete your own personal growth plan. [Use this template.](#)
- Schedule 2021 strategic planning retreat. We've got a complete plan, a course to explain everything, and a template you can follow in the [Building Your Ministry Plan course.](#)
- Set and communicate goals for next year.
- Christmas gifts and cards for staff and key leaders.