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Advance Your Knowledge Webinar Series

Tracking Mission Trips in Non-Financials

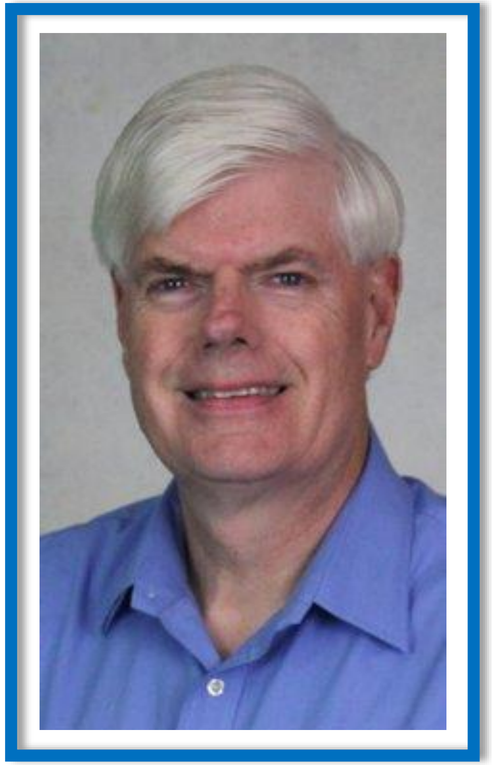
Welcome

Please take a moment to locate the Zoom Webinar controls.
Feel free to say hello or ask a question using the Q & A feature.

Welcome – Introducing our Panelist

Ben Lane

ShelbyNext Trainer



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Charitable Giving or not

Are payments to cover personal or family expenses on short-term mission trips considered charitable giving and reportable on the giving letter or not charitable giving?

Yes or **No**

If I am paying for someone else?

If I am paying for myself?

This is a very important question for your organization to answer since it determines how you will set up the categories to receive the money.

Short Term Mission Trip Charitable Giving?

The IRS has determined that participants in a short-term mission trip were not participating for personal benefit (Even if they enjoy mission involvement), but were representatives of the church/organization, thus the payments for the expense of the trip can be considered charitable contributions and can be reported on the giving letter if a "**significant**" portion of the trip is purpose-specific.

Please refer to the IRS Publication 526, Church and Clergy Tax Guide, and the ECFA website as well as their book called, "Charitable Giving Guide for Short-Term Mission Trips" for reference and information.

Do not take my word for it, do your research!!!

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Can I designate my gifts to a specific person?

- Since the purpose of my gift is to help to cover my or another person's expenses on the trip, you can identify the person to whom you request your gift could be credited.
- Use soft terms in your publicity. Instead of "we commit or guarantee that this person will get the money" to "we will honor your **request** to provide this gift to reduce the participant's trip cost". ECFA recommends, "Contributions are solicited with the understanding that First Church has complete discretion and control over the use of all donated funds."
- Make sure your church/organization has a written policy on short-term mission trips approved by the appropriate board, committee, or person. It should cover what happens to the gift if the person requested has already received all their funds or does not go on the trip after receiving money. There is an example in the ECFA book.
- Provide template letters of support to the participants to use so that the correct terminology is used. There is an example in the ECFA book.

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Step for tracking the Mission trip

Create the giving category in ChMS (If using ShelbyNext Financials, create the income account in financials and map the category to the account)

Create a fund in On-Line Giving

Link the Fund in Giving to the Category in ChMS

Create a group(s) in ChMS

Create a form in ChMS

Link the form to ChMS with a Workflow

Publicize the form and start receiving Registrations and payments.

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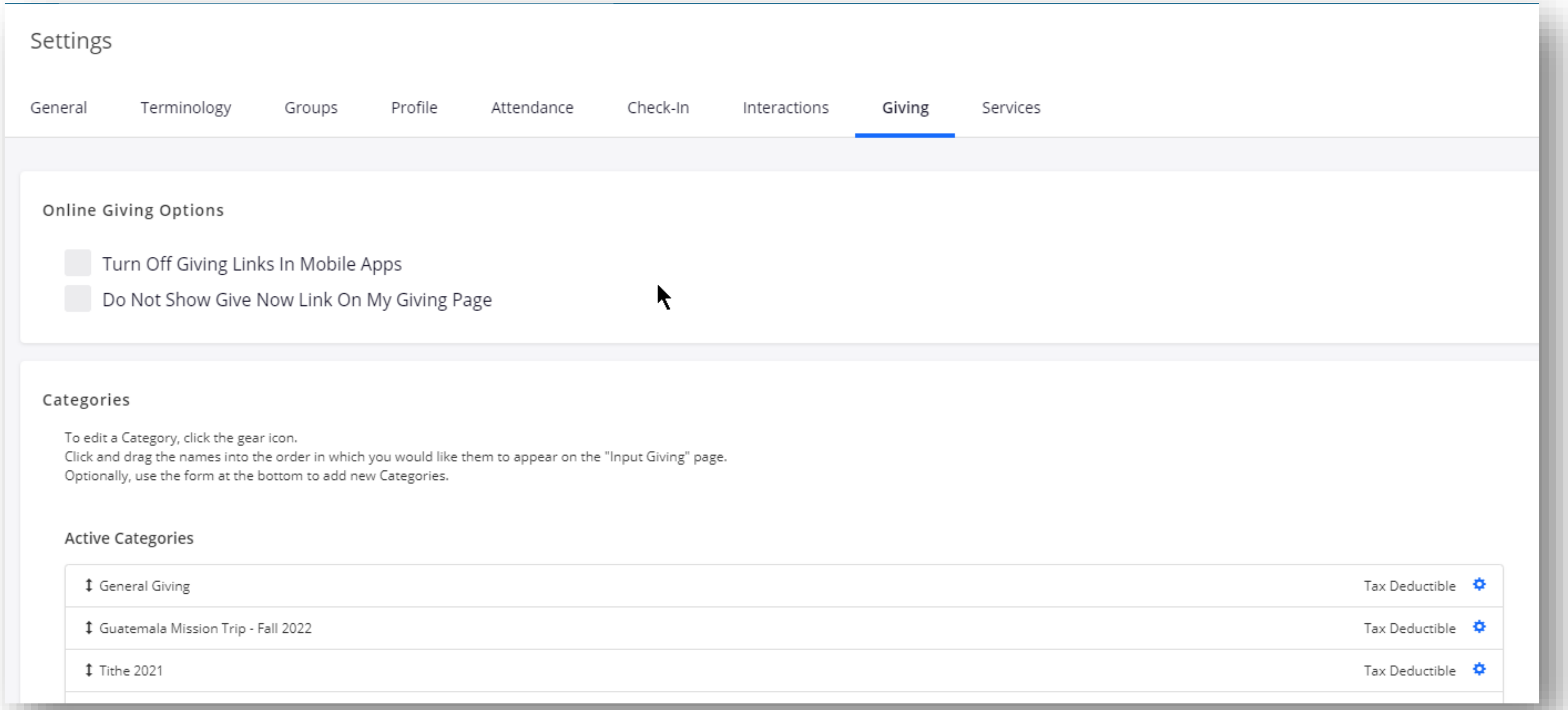
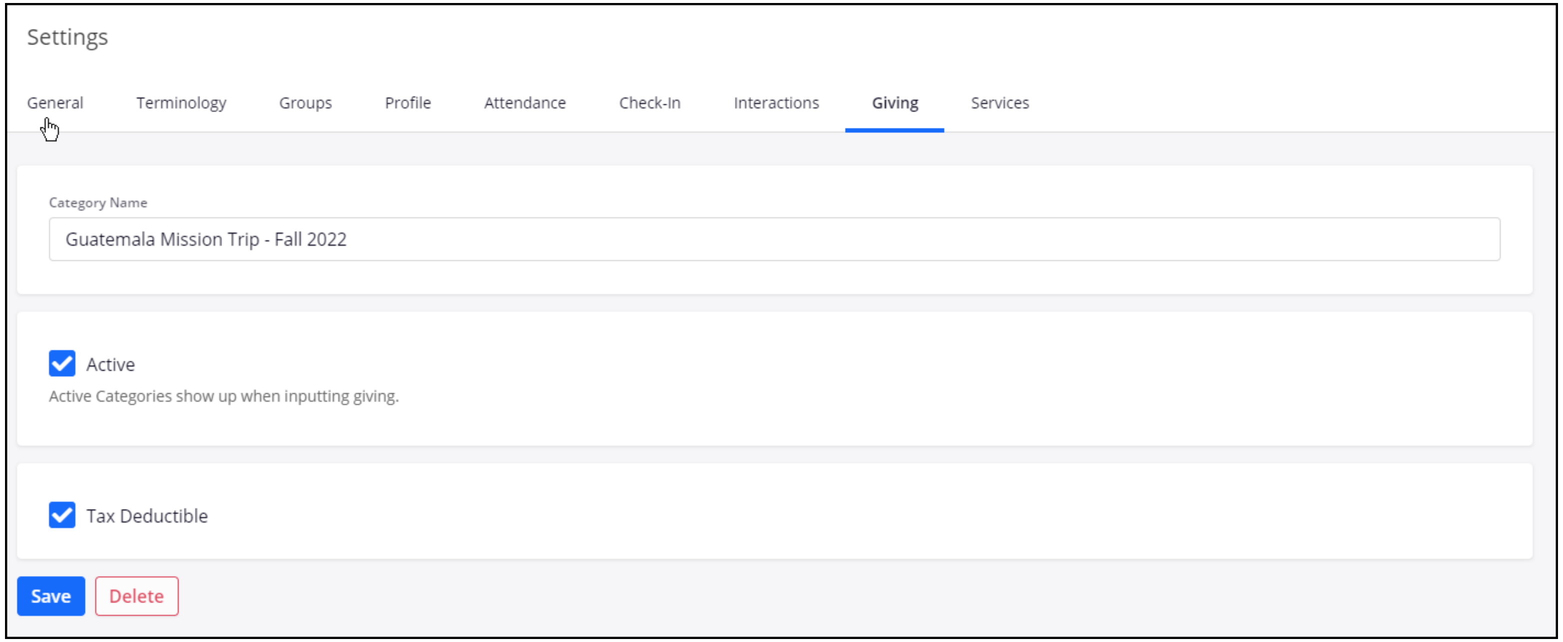
Set up the Category in ChMS

- Go to the Gear at the upper right part of the screen and select **Settings** and then select the **Giving** Tab
- Select "Giving Options and Categories" (Unless you renamed Categories)



Set up the Category in ChMS

- Go below the list of categories and type in the new category name
- It will default to Active and Tax Deductible. Open and uncheck the tax-deductible if appropriate. Inactivate after the trip is complete.



Set up the Category in ChMS

- Map the category to ShelbyNext Financials from the Giving Settings tab and ShelbyNext | Financials Account Sync Settings

Map Your Categories To Your ShelbyNext | Financials Accounts

Category	ShelbyNext | Financials Bank Account	ShelbyNext | Financials Income Account
General Giving	1-0-10110 ACB operating checking Choose Account	1-10-40110 Offering-Tithes/pledge Choose Account
Guatemala Mission Trip - Fall 2022	1-0-10110 ACB Operating Checking Choose Account	1-100-41170 Offering-Missions Trips Choose Account

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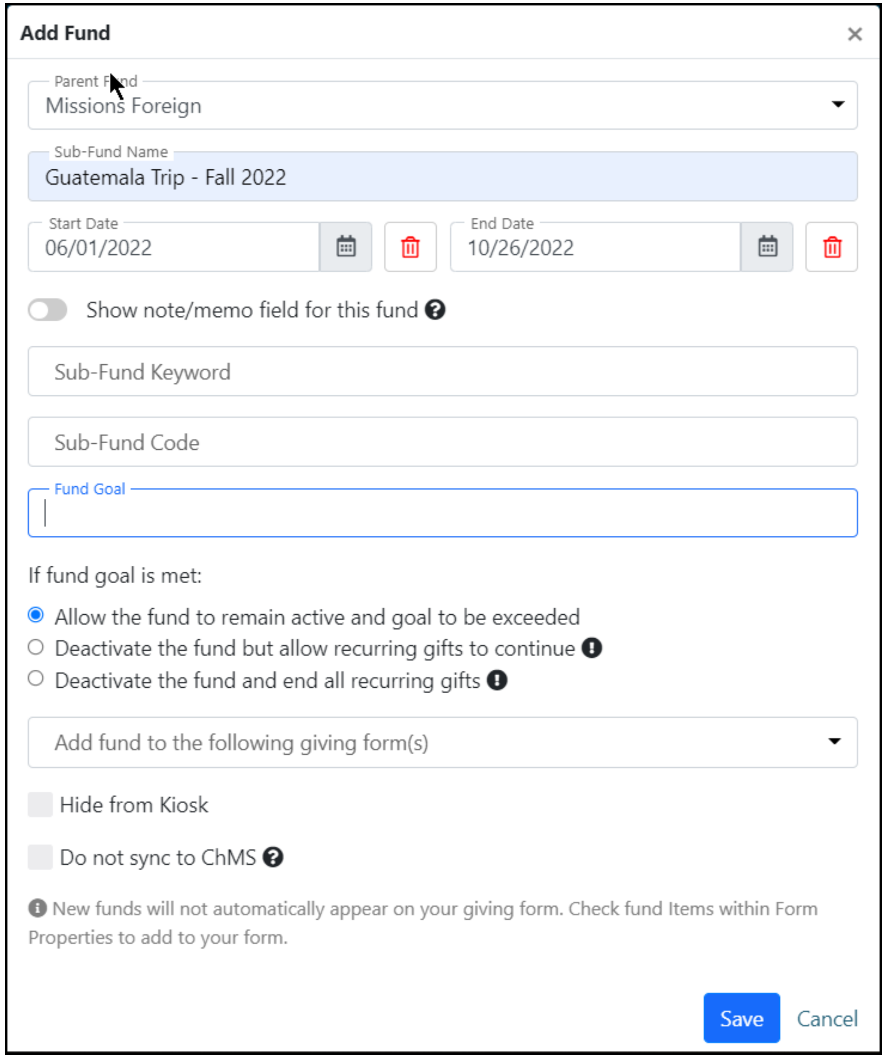
Set up the fund in On-Line Giving

- Click on Fund Management from the navigation on the left and select Add from the top of the screen
- Some organizations will have a Mission trip Parent fund and the trips as sub-funds
- You could activate the Note/Memo field if you were to allow them to request the money go to a specific individual but it is probably best to let the giving form manage this.

Set up the fund in On Line Giving



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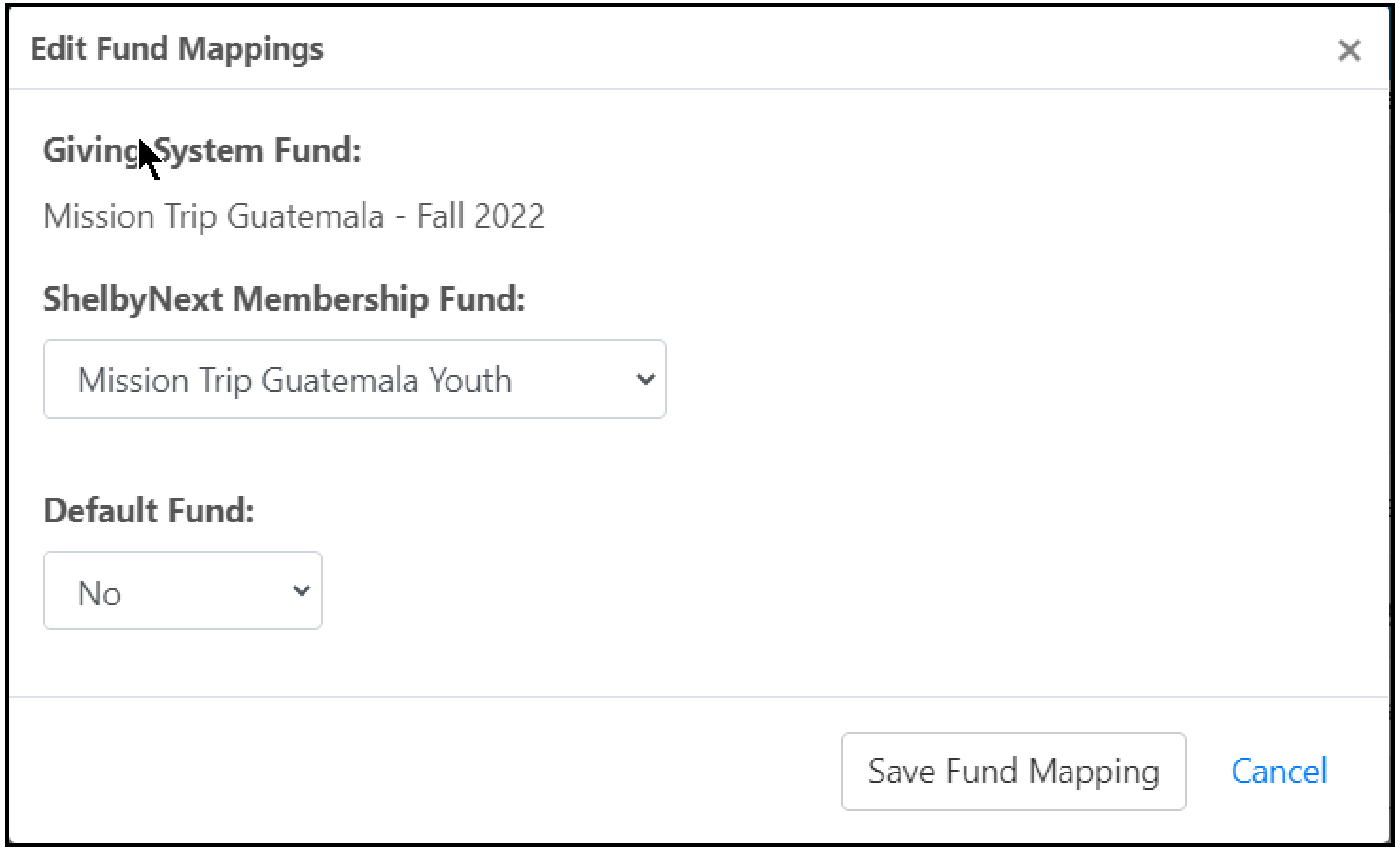
Set up the fund in ShelbyNext Giving

- Go to ChMS Integration in Settings to map your funds to ChMS



Create the Form

- Registration Form?
- Giving Form?
- Both - 2 separate forms?
- Both – 1 form with both included?
- If the form is multi-purpose, then use the conditional function in the form item settings

Form Considerations

- Will the trip participants' names be provided in a drop-down list to be selected for payments to their trips or use a text field? If using a drop down, the form would have to be updated when someone registers and is approved.
- Should you use a separate form for each trip or one for all trips?
- Will the form be used for the registration of the team members, collect their payments, and to contribute to another person's trip?
- Use the Email option to confirm registration, notify the team leader or registrations, or provide contribution confirmation
- Link to Form

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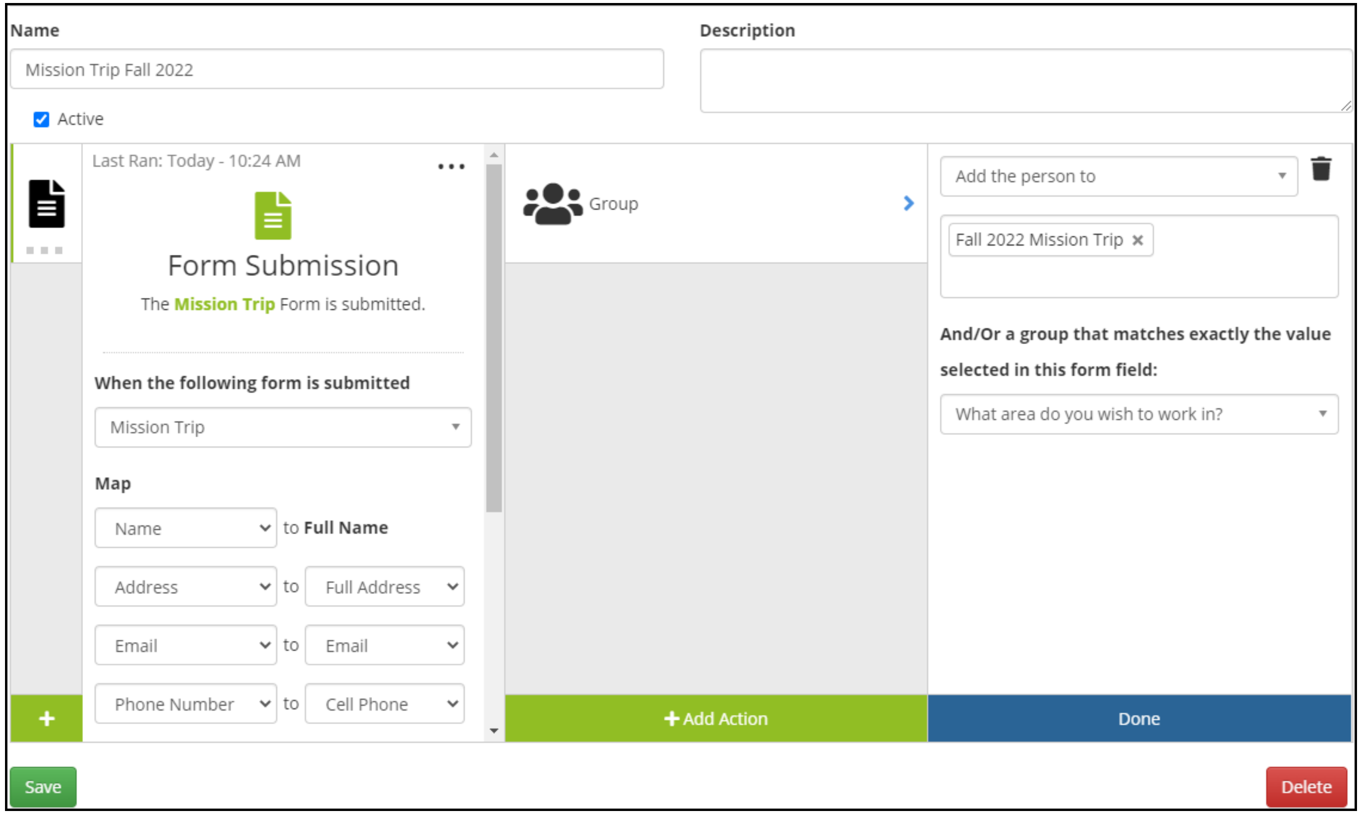
Create the Groups in ChMS

- What kind of groups are needed to manage the trip?
- General trip group for communicating and track attendance for team meetings.
- Groups to track individual team preferences
- Groups to track skills needed for the trip

Create the Workflow

- Would be best to use one trip per form if using the workflow to sync to ChMS and groups

- Make sure the group names exactly match the selections on the form field selection options to work with the workflow.



Suggestions for ChMS Record

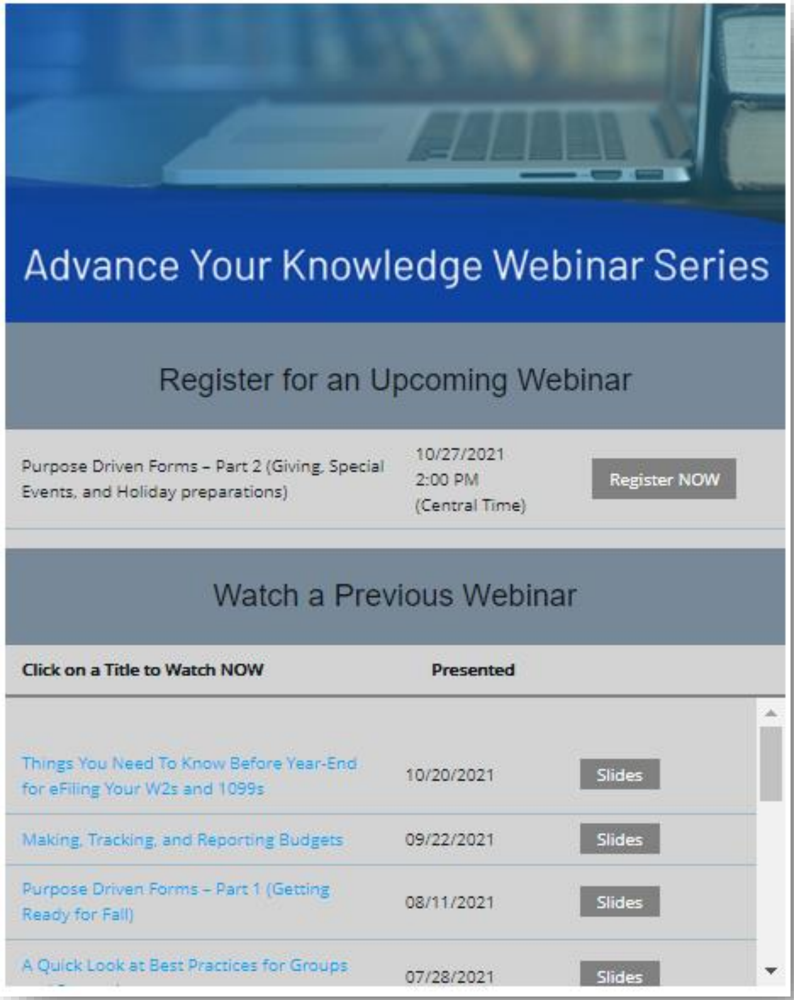
- Scan the passport picture, medical documents, or any other important documents and place it into Documents
- Use Configurable date and text fields to track important data that would be valuable for this and additional trips, like Passport expiration date.
- Use Interactions to remind trip leaders of significant dates or remind trip members of actions not taken.
- Use Schedules to create teams and positions to help organize the team members for service on the trip.

Where can I watch this video again?

Watch or Register to attend Webinars

@ Community.Shelbysystems.com

<u>Now Including Slides to Download</u>



Next “Advance Your Knowledge” Webinar

Tracking Credit Card Activity in ShelbyFinancials

Date: 6/29/22

Time: 3pm E/2pm C/12pm P

Led by: Carmen Dea and Mark Crain Staff Trainers

If you have staff who use a company credit card, or even if you have several cards linked to the same account, you could be tracking this in your Financials. You can enter or import transactions from charges made by users. You can reconcile the recorded activity against the statement. You will have a much more accurate assessment of vendor expenses. Find out the mechanics, the tips and tricks, and how it all works inside of your existing Account Payable application if you have ShelbyFinancials.

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Resources

Contact links that are provided in this webinar are unique to Shelby Systems. If you are watching this and use one of our sister companies Giving or ChMS products, please connect with your Success Representatives or Support Team.

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