

AWAKE

Virtual Analytics Training



ABOUT YOUR COACHES



Meagan Brown, Vice President of Sales

Meagan loves to help people discover biblical financial principles for success. She received her Bachelor of Business Administration from West Texas A&M University in 2004 and went on to obtain her licenses for practicing retirement and financial planning.

After 7 years of financial planning in corporate America, Meagan accepted a position as the Pastor of Stewardship where she spent 7 years helping to develop a Stewardship Ministry across a multi-campus, 10,000 member church. Meagan's passion is to develop a culture of generosity throughout the church.



Randy Cox, Customer Success

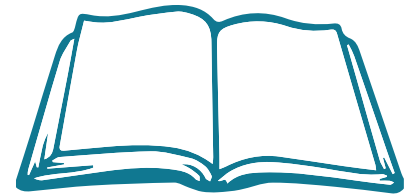
Randy has over 15 years of pastoral experience serving as a pastor in the areas of worship, young couples, small groups, Biblical counseling, and stewardship. Most recently he served on staff at Gateway Church in Southlake, Texas, in Pastoral Care. Randy's passionate about serving the church and helping church leadership to reach more disciples.

Session 1: Stewardship Framework

→ **Question:** *Why is it important for the Church to LEAD, TEACH, and PREACH on Stewardship and Generosity in the context of Money?*

Answer:

Matthew 6:21 - "For where your treasure is, there your heart will be also."



Session 1: Stewardship Framework

2 Big Items Your Ministry Should Address:

1. Stewardship – How you manage the gifts (time, talents, treasures) that God has given.
2. Generosity – How generous are you with all that God has given?

Stewardship and generosity are two legs to the same body – It takes BOTH to move the body forward.

- Our level of generosity is determined by our stewardship.
- Both reflect our level of TRUST, LOVE, and WORSHIP of God.

Session 1: Stewardship Framework

1

3 Types of Funding

Annual Giving

- Modest gifts made from discretionary income
- Made for current operations & immediate use
- Participation and increasing gifts is the focus

2

Major Giving/Capital Campaigns/One-Fund Initiatives

- Gifts from assets or multi-year pledges
- Gifts to capital needs and special projects
- Gifts generally of significant size

Classical Fundraising Approach

3

Planned Giving

- Gifts from assets or estate wealth
- Gifts used for endowment or designated purposes
- Gift request is built over time
- Likely the giver's largest gift

Session 1: Stewardship Framework



Basic Components of a Stewardship Ministry:

1. Education
2. Coaching



Goal for using MortarStone:

1. Identify: Opportunities to Grow & What Holes to Fill
2. Set a Goal
3. Apply Strategy
4. Work the Strategy
5. Measure Your Goals

Session 1: Stewardship Framework



Giver Development:

Financial discipleship that grows givers in their walk towards full-life stewardship and generosity

Questions to Consider

1. Where are your givers on their stewardship journey?
2. What interests you the most about strategy or data?
3. What do you currently measure within your data?
4. What is your goal for using this software?



SESSION 2

Understanding the Software Basics

- Dashboards
- Summaries
- Households
- Giver Development

Session 2: Understanding the Software Basics

1. What does data say about my church?

Data shows you the benchmarks around giving segments and helps you set a goal for where you would like to go.

2. What can I do with my data?

Data allows you the opportunity to drill-down and identify givers, track segmented groups of givers, assign tasks to your internal team, and make discipleship connections that transform lives.

Filters: allow you to scope backwards by a date, by a campus location, or fund category

Session 2: Understanding the Software Basics

Dashboards: *key performance metrics showing benchmarks, such as acquisition, retention & more*

All Givers: All giving households in bands 1-5

All Givers provides an overview of giving without segmentation. Everyone who has given is included in this report. Funds and locations are filtered according to your current report settings.

New Givers: All giving households that have given for the first time

New Givers are households who give for the first time in the given period. These are families that could be brand new to your ministry or have been coming for years and recently decided to invest financially.

Session 2: Understanding the Software Basics

Core Givers: All giving households in bands 2-4

Core Givers are those who give \$200.00 to \$9,999.00 in the past 12 months to the selected funds. They are the vast majority or "middle section" of your church and are represented by bands 2, 3 and 4. They typically account for about 65% or more of total giving and givers.

Top Givers: All giving households in band 5

Top Givers are those who give \$10,000.00 or more in the last 12 months to selected funds. They typically represent the smallest percentage of your constituency (5%-10%) and the largest portion of giving (40%+). As a group, they are often mismanaged or spiritually neglected. In a large church, Top Givers are on the short list of 'who to call' when there is a financial need and yet the vast majority of them won't have a relationship with a senior pastor or leader. Top Givers should not be labeled as just rich or generous, but committed.

Session 2: Understanding the Software Basics

Giver Development

With your Giver Development section, you have the ability to use the following tools to identify households, refine giving reports, and assign workflows for discipleship opportunities.

Households

The households section of your platform shows you the entirety of your giving households. Within this area you can perform advanced searches to identify unique giving segments.

Session 2: Understanding the Software Basics

The following tools are found within Giving Development:

- **Searches:** Allow you to search for giving households based on specified parameters. You can create customizable reports that can be saved and rerun.
- **Filters:** Specified parameters that allow you to segment groups of households.
- **Lists:** A giving segment you would like to see giving pattern notifications on.
- **Triggers:** Automatic settings that add giving households to specified lists.
- **Tags:** Key identifiers that you assign to giving households.
- **Connections:** Area that allows you to specify communication connections for each household.
- **Assignments:** Assign team members or volunteers specific tasks for giver development strategies.



SESSION 3

Giving Segments, Benchmarks, Goals, Strategies
& Sample Workflows

- All Givers
- New Giver
- Core Givers
- Lapsed Givers
- Top Givers

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows

Definitions

1. Giving Unit: giving household
2. Bands: segments of giving, based on amount given
3. Benchmark: percentage of current giving
4. Goal: percentage of giving to achieve
5. Workflows: who on your team is tasked to fulfill the particular strategy within the allotted timeframe. (*who does what by when*)

Giving band ranges

Band 1	\$0 to \$200
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Band 2	\$200 to \$1,000
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Band 3	\$1,000 to \$5,000
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Band 4	\$5,000 to \$10,000
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Band 5	\$10,000 and Above
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Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows



Band	Households	Giving	Average	% Households	% Giving
1	482	\$32,159.61	\$66.72	34.65%	0.99%
2	356	\$169,541.15	\$476.24	25.59%	5.22%
3	351	\$840,339.84	\$2,394.13	25.23%	25.85%
4	131	\$919,311.69	\$7,017.65	9.42%	28.28%
5	71	\$1,289,176.91	\$18,157.42	5.1%	39.66%
Totals	1,391	\$3,250,529.20	\$2,336.83	100.0%	100.0%

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows

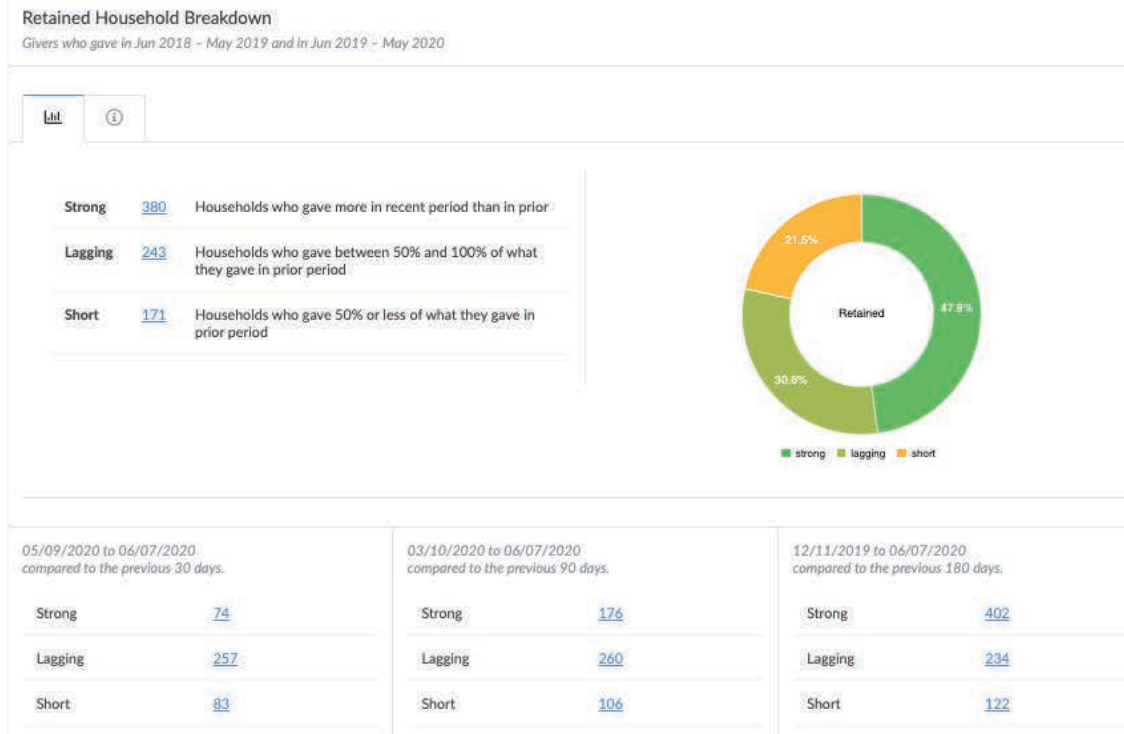
➔ SEGMENT 1: All Givers

Percentile Distribution

Households organized by percent of giving related to church-wide giving

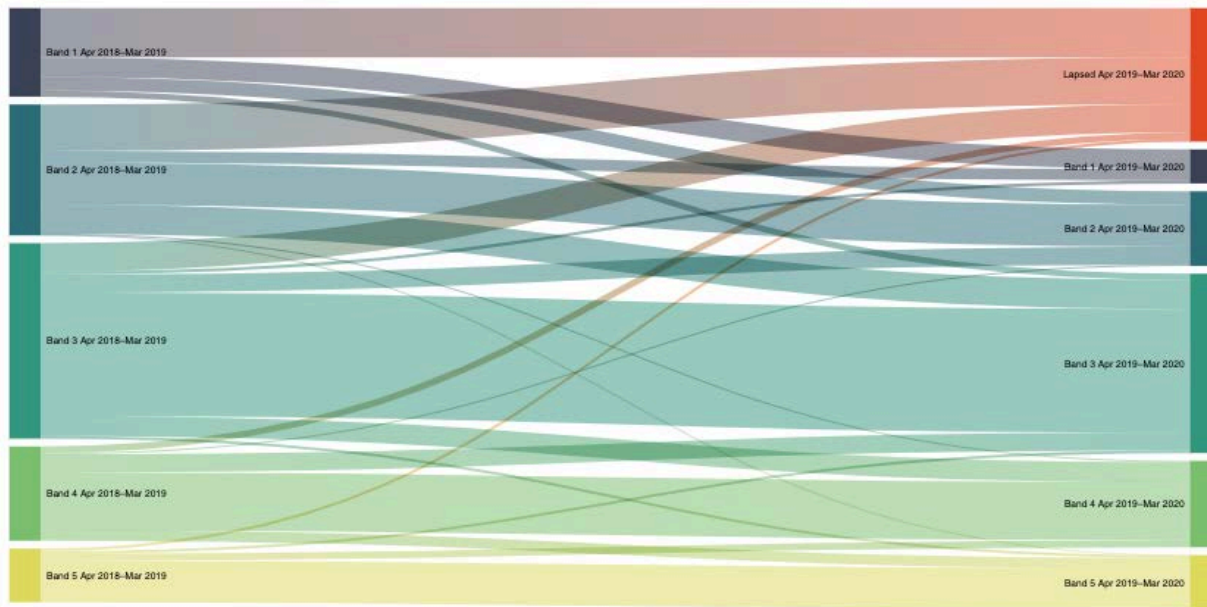
Summary	Apr 2019 - Mar 2020	Apr 2018 - Mar 2019	Apr 2017 - Mar 2018	
	Top 50			
		Top 40		
			Top 30	
			Top 20	
			Top 10	
🏠 637 (50%) \$390,095.81 (6.77%) 1-49 Percentile	🏠 130 (11%) \$305,838.82 (5.31%) 50-59 Percentile	🏠 130 (11%) \$455,653.38 (7.91%) 60-69 Percentile	🏠 130 (11%) \$662,346.15 (11.5%) 70-79 Percentile	🏠 130 (11%) \$993,564.64 (17.24%) 80-89 Percentile
				🏠 123 (10%) \$1,941,492.57 (33.7%) 90-99 Percentile
				🏠 12 (1%) \$1,012,908.24 (17.58%) 100th Percentile

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → SEGMENT 1: All Givers



93% of lapsed givers will not return or re-engage with your church if you do not have a strategy to connect with them.

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → SEGMENT 1: All Givers



		Apr 2019 - Mar 2020 →					
Apr 2018 - Mar 2019 ↓	Band 1	Band 2	Band 3	Band 4	Band 5	Lapsed	
Band 1	45	31	14	0	0	113	
Band 2	26	96	67	3	1	107	
Band 3	7	41	283	46	6	65	
Band 4	0	3	41	133	24	15	
Band 5	0	0	6	16	95	6	

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows

→ SEGMENT 1: All Givers

Giving Percentage Goals

- Band 1: 5%
- Band 2: 20%
- Band 3: 25%
- Band 4: 25%
- Band 5: 25%

Band	Households	Giving	Average	% Households	% Giving
1	<u>482</u>	\$32,159.61	\$66.72	34.65%	0.99%
2	<u>356</u>	\$169,541.15	\$476.24	25.59%	5.22%
3	<u>351</u>	\$840,339.84	\$2,394.13	25.23%	25.85%
4	<u>131</u>	\$919,311.69	\$7,017.65	9.42%	28.28%
5	<u>71</u>	\$1,289,176.91	\$18,157.42	5.1%	39.66%
Totals	1,391	\$3,250,529.20	\$2,336.83	100.0%	100.0%

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows

SEGMENT 1: All Givers

SUGGESTED IMPLEMENTATION STRATEGIES

To better diversify giving within each of the following bands, it is important that you are doing the following:

1. Sharing Your Story: your church should be sharing the story of the lives you are changing through the various ministries at your church.
 - a. Schedule a new life change story to be shared each week.
 - b. Use all communication channels to share the story (pulpit, email, social media, APP, and personal conversations)
2. Tell People How to Give: everyone at your church should know how to give to ministry.
 - a. Make sure your giving is obvious and accessible.
 - b. Giving opportunities should be available online, during services, APP payments, kiosks, and giving boxes.

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows

SEGMENT 1: All Givers

SUGGESTED IMPLEMENTATION STRATEGIES

3. Be Transparent with Your Giving: make sure everyone knows where their gifts are going.
 - a. Feature one ministry each week that has been blessed by giving.
 - b. Advertise what giving helps to do within the church. (signage, online, and in the church announcement medias)
4. Offer Targeted Financial Courses: Segment your givers by band and offer classes based on their giving patterns.
 - a. Bands 1 & 2: budgeting and debt classes
 - b. Band 3: saving and generosity
 - c. Bands 4 & 5: investing, retirement, and ministry multiplication through funding

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows

SEGMENT 2: NEW GIVERS

DESCRIPTION

The New Givers view shows households who gave for the first time in the given period. These families could be brand new to your ministry, or they might have been coming for years and recently decided to invest financially.

VALUE

New Givers are the top of the “giving funnel” and ensure healthy church growth. They are a proxy for how well your church is creating awareness, community, and living on mission in your city. The number one reason a person comes to church is by invitation from a fellow attendee. You must encourage your regular attendees to invite people to attend your church.

Three characteristics of New Givers:

1. New Givers are the most at-risk segment, having the lowest retention rate of your giving population.
2. New Givers want transparency of what their giving supports.
3. New Givers want a relationship with the church family they are financially supporting.

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows

➔ SEGMENT 2: NEW GIVERS

Acquired Giving

Giving from new givers by cohort

☰ % \$

Cohort	Initial	+1 month	+2 months	+3 months	+4 months	+5 months	+6 months	+7 months	+8 months	+9 months	+10 months	+11 months	+12 months
May 2019	16 (100%) \$3,746.00	11 (69%) \$2,999.00	6 (38%) \$2,280.00	8 (50%) \$1,420.88	6 (38%) \$1,140.66	7 (44%) \$2,985.55	4 (25%) \$1,010.00	5 (31%) \$2,141.32	4 (25%) \$540.44	5 (31%) \$890.66	4 (25%) \$491.10	3 (19%) \$466.43	2 (13%) \$376.65
Jun 2019	29 (100%) \$5,397.72	11 (38%) \$2,931.39	12 (41%) \$4,330.80	11 (38%) \$3,597.82	10 (34%) \$3,820.19	10 (34%) \$3,683.46	9 (31%) \$2,777.28	7 (24%) \$1,798.65	6 (21%) \$1,687.53	7 (24%) \$2,129.28	5 (17%) \$1,155.93	6 (21%) \$1,751.76	
Jul 2019	32 (100%) \$3,555.29	18 (56%) \$2,227.14	17 (53%) \$2,699.05	12 (38%) \$1,572.95	12 (38%) \$2,448.74	11 (34%) \$2,272.99	12 (38%) \$2,301.00	14 (44%) \$2,074.20	12 (38%) \$2,112.29	9 (28%) \$2,014.36	8 (25%) \$2,680.82		
Aug 2019	56 (100%) \$14,541.08	34 (61%) \$13,859.80	27 (48%) \$10,717.27	24 (43%) \$13,053.00	25 (45%) \$12,412.41	29 (52%) \$13,835.65	28 (50%) \$12,008.61	24 (43%) \$20,858.86	21 (38%) \$13,856.64	17 (30%) \$14,289.21			
Sep 2019	67 (100%) \$11,102.26	29 (43%) \$4,403.99	31 (46%) \$4,111.05	29 (43%) \$7,938.88	27 (40%) \$4,010.94	28 (42%) \$4,724.79	28 (42%) \$5,849.30	23 (34%) \$5,338.31	21 (31%) \$4,899.86				
Oct 2019	48 (100%) \$8,133.13	16 (33%) \$3,105.00	14 (29%) \$4,389.40	15 (31%) \$4,595.00	15 (31%) \$4,229.00	15 (31%) \$3,360.20	10 (21%) \$2,438.20	7 (15%) \$1,889.20					
Nov 2019	38 (100%) \$7,162.77	18 (47%) \$11,046.24	17 (45%) \$3,045.38	16 (42%) \$2,016.62	11 (29%) \$1,604.78	3 (8%) \$956.10	6 (16%) \$2,839.58						
Dec 2019	72 (100%) \$19,279.31	15 (21%) \$4,838.31	20 (28%) \$4,004.16	17 (24%) \$8,005.81	9 (13%) \$4,488.55	12 (17%) \$5,884.74							
Jan 2020	55 (100%) \$15,675.85	25 (45%) \$2,517.16	13 (24%) \$5,261.61	8 (15%) \$3,634.90	7 (13%) \$3,710.92								
Feb 2020	40 (100%) \$3,719.75	15 (38%) \$2,160.36	11 (28%) \$2,727.65	9 (23%) \$998.14									
Mar 2020	41 (100%) \$5,006.75	18 (44%) \$3,688.45	15 (37%) \$4,028.63										
Apr 2020	43 (100%) \$80,232.78	12 (28%) \$1,545.46											
May 2020	15 (100%) \$2,699.63												
Totals	552 (100%) \$180,252.92	222 (41%) \$55,322.30	183 (37%) \$47,595.00	149 (33%) \$46,834.00	122 (30%) \$37,866.19	115 (32%) \$37,703.48	97 (34%) \$29,223.97	80 (32%) \$34,100.54	64 (32%) \$23,096.76	38 (29%) \$19,323.51	17 (22%) \$4,327.85	9 (20%) \$2,218.19	2 (13%) \$376.65

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → SEGMENT 2: NEW GIVERS

NEW GIVER STRATEGIES

1. Call Every First-Time Giver

- Record any notes from calls. Leave messages for those who do not answer.
- Point them in direction of ministry if needed and plan to invite them to a 'welcome reception'.
- Have a story ready to share about a life that has been transformed from the church.

Send Hand Written Notes to those who give > \$100 from pastors

- If you don't have a phone number for the giver send a thank you note. Your note should have a picture on the front

2. FIRST TO SECOND TIME GIVER STRATEGY

3. FIRST TIME GIVERS WHO DON'T GIVE AGAIN

4. ATTENDANCE STRATEGY

Compare attendance to givers. What is the percentage of total givers vs. total attendees? What is the documented strategy to move non-givers into a first-time givers and first-time givers into regular givers? Create communication and engagement strategies for those that attend but don't give. Include elements of vision and describe what the pastoral staff wants for people in the area of financial stewardship for their lives.

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → SEGMENT 2: NEW GIVERS

CURRENT BENCHMARKS

New Giver Baseline	552
New Giving Baseline	\$180,252
Current Retention	18%
Retained Givers	99
Retained Giving	\$32,445
Retained Giving Average	\$327

NEW GIVER GOALS

Retention Goal	25%
New Giver Total	138
Retained Giver Increase	39
Retained Giving Increase	\$12,617.66
12 Month Increase	\$151,411.95

Questions:

- Are your retention levels lower because New Givers are not connected (assimilated)?
- Is giving lower for New Givers because they don't have the financial margin to give?
- Do your New Givers understand the value of giving?
- Does your giver (people) trend match the giving (dollars) trend?

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → SEGMENT 2: NEW GIVERS

WHO

WHAT

Pulls the first-time giver report from MortarStone Weekly. *(By Campus location? Or by all givers.)*

Checks to see if the list may have any things your MortarStone platform would not know. Eliminate those givers if applicable.

Gives each Campus Pastor the names on their list to call, and phone numbers if applicable.

Sends email, handwritten note, phone call and text to first-time givers. Remember to record all phone calls and email messages in the giver's profile notes.

WHEN

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → SEGMENT 3: CORE GIVERS

DESCRIPTION

The Core Givers view shows those who gave \$200 to \$9,999 in the past 12 months to the selected funds. They are the vast majority or "middle section" of your church and are represented by bands 2, 3, and 4. Core Givers typically account for about 65% or more of total giving and givers.

VALUE PROPOSITION

As a group, Core Givers represent the vast majority of your volunteers, including those who serve as lay leadership. Without this committed core, most churches would shrink by 50%. The discipleship pathway of your Core Givers will look different than that of your first-time givers and top givers. The greatest opportunity for sustainable giving growth can be found within this segment.

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → SEGMENT 3: CORE GIVERS

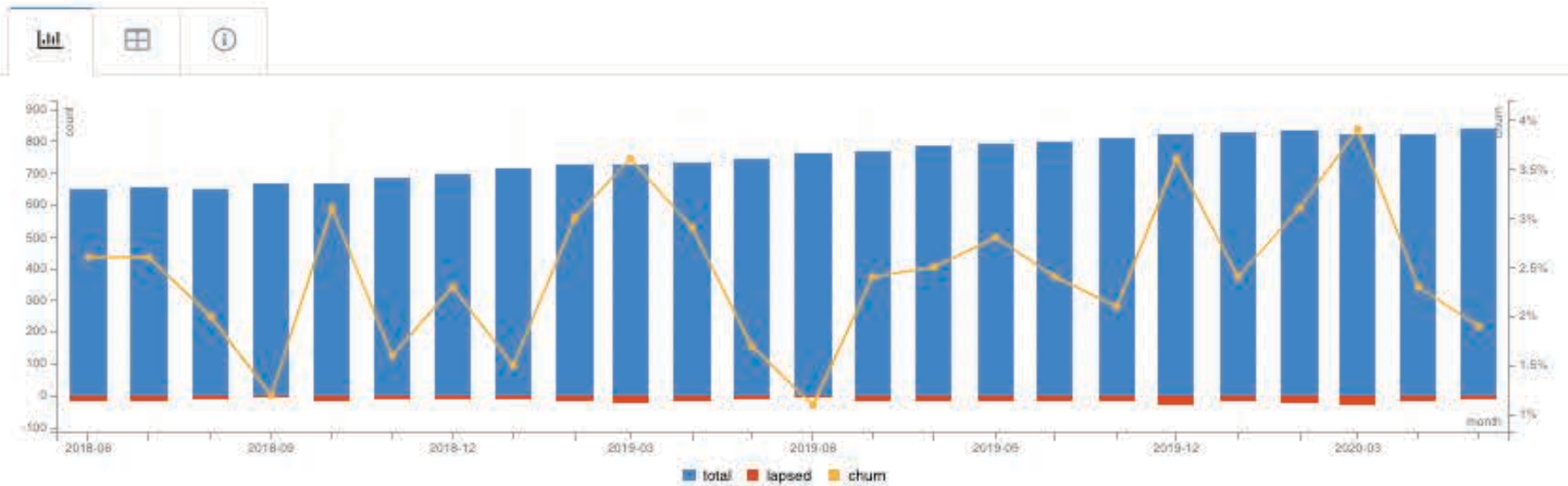
Acquired Giving
Giving from new core givers by cohort

Cohort	Initial	+1 month	+2 months	+3 months	+4 months	+5 months	+6 months	+7 months	+8 months	+9 months	+10 months	+11 months	+12 months
May 2019	42 (100%) \$13,013.00	25 (60%) \$10,964.00	25 (60%) \$9,697.16	26 (62%) \$8,580.92	25 (60%) \$8,853.80	27 (64%) \$10,876.89	24 (57%) \$7,598.15	23 (55%) \$11,737.84	16 (38%) \$5,329.35	19 (45%) \$6,604.38	17 (40%) \$8,094.53	18 (43%) \$9,481.30	15 (36%) \$7,993.55
Jun 2019	51 (100%) \$24,331.72	34 (67%) \$11,251.75	36 (71%) \$14,545.55	32 (63%) \$14,168.14	29 (57%) \$14,679.29	28 (55%) \$10,342.55	26 (51%) \$12,813.68	24 (47%) \$8,380.65	28 (55%) \$8,196.96	26 (51%) \$7,682.14	20 (39%) \$10,062.13	20 (39%) \$8,036.20	
Jul 2019	37 (100%) \$17,445.50	23 (62%) \$8,390.30	27 (73%) \$10,398.04	23 (62%) \$9,467.84	23 (62%) \$9,375.49	23 (62%) \$9,197.88	20 (54%) \$6,917.17	18 (49%) \$6,514.80	14 (38%) \$5,825.70	13 (35%) \$4,633.64	12 (32%) \$5,346.86		
Aug 2019	57 (100%) \$25,781.88	46 (81%) \$23,258.26	41 (72%) \$18,746.82	39 (68%) \$21,377.37	37 (65%) \$24,272.69	35 (61%) \$24,904.57	35 (61%) \$19,525.77	35 (61%) \$29,828.64	31 (54%) \$21,443.40	26 (46%) \$22,610.05			
Sep 2019	71 (100%) \$34,732.76	53 (75%) \$23,227.24	49 (69%) \$25,873.77	49 (69%) \$34,068.85	42 (59%) \$21,045.28	46 (65%) \$21,036.28	39 (55%) \$27,289.47	34 (48%) \$24,976.70	29 (41%) \$18,438.99				
Oct 2019	43 (100%) \$21,433.31	31 (72%) \$7,628.92	30 (70%) \$10,197.20	31 (72%) \$9,572.25	28 (65%) \$7,459.03	26 (60%) \$8,117.68	17 (40%) \$5,463.30	16 (37%) \$5,039.29					
Nov 2019	46 (100%) \$22,849.55	34 (74%) \$21,623.16	33 (72%) \$14,413.21	30 (65%) \$11,194.32	26 (57%) \$9,002.94	20 (43%) \$11,974.33	20 (43%) \$13,581.77						
Dec 2019	84 (100%) \$51,023.00	53 (63%) \$17,093.11	52 (62%) \$15,335.01	51 (61%) \$19,265.89	39 (46%) \$15,071.19	41 (49%) \$15,721.66							
Jan 2020	37 (100%) \$23,066.12	26 (70%) \$8,101.14	23 (62%) \$13,345.76	15 (41%) \$8,447.70	16 (43%) \$11,335.13								
Feb 2020	46 (100%) \$14,856.61	29 (63%) \$13,411.57	25 (54%) \$11,921.00	25 (54%) \$11,925.29									
Mar 2020	44 (100%) \$17,975.15	29 (66%) \$8,202.25	21 (48%) \$7,942.31										
Apr 2020	51 (100%) \$23,884.68	33 (65%) \$11,722.58											
May 2020	44 (100%) \$20,963.00												
Totals	653 (100%) \$311,356.28	416 (64%) \$164,874.28	362 (55%) \$152,415.83	321 (49%) \$148,068.57	265 (41%) \$121,094.84	246 (38%) \$112,171.84	181 (28%) \$93,189.31	150 (23%) \$86,477.92	118 (18%) \$59,234.40	84 (13%) \$41,530.21	49 (7%) \$23,503.52	38 (6%) \$17,517.50	15 (2%) \$7,993.55

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → SEGMENT 3: CORE GIVERS

Household Churn Rate

Total core giver population vs. core giver lapses



Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → SEGMENT 3: CORE GIVERS

Jun 2019	-26	958	2.7%
Jul 2019	-22	957	2.3%
Aug 2019	-19	958	2.0%
Sep 2019	-19	967	2.0%
Oct 2019	-18	975	1.8%
Nov 2019	-13	979	1.3%
Dec 2019	-26	973	2.7%
Jan 2020	-15	982	1.5%
Feb 2020	-22	977	2.3%
Mar 2020	-26	968	2.7%
Average	-21	952	-2.2%
Total	-483	22,848	-2.1%

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → SEGMENT 3: CORE GIVERS

CORE GIVER GOALS & STRATEGY

Seek first to understand then to be understood. Communication about church vision will your key to success. Remember, Core Givers are those found within bands 2-4, and they have regularly given for the past year. These givers typically believe in the vision and mission of the church and are committed to seeing your church grow. Core Givers and Top Givers are your biggest fans.

1. Second time givers who give more than \$500 a year
2. Tag volunteers, small group leaders, and members - identify what band level each is giving at
3. This is where you will begin to work with your Campus pastors and ministry directors on church-wide giver development strategies.

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → SEGMENT 3: CORE GIVERS

You Must Invite Core Givers to Serve

- Record any notes from calls in MortarStone. Leave messages for those who do not answer.
- Follow-up your phone call or message with an email, inviting the giver to consider serving.

Have a story about a life that has been transformed from the church ready to share.

Send Hand Written Thank You Notes Once a Quarter

- Get every ministry involved with writing thank you notes. Divide your Core givers into demographically segmented lists. Identify which ministries should thank which givers. For example, a single-female Core giver should receive a thank you note from the Women's Ministry team.

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → SEGMENT 3: CORE GIVERS

CURRENT BENCHMARKS

Total Givers	1391
Core Giver Baseline	838
Current Percentage of Total	60%
Core Giving Baseline	\$1,929,192
Current Percentage of Total	59%
Average Giving Per Core Giver	\$2,302

CORE GIVER GOALS

Core Giver Goal	65%
New Core Giver Total	904
Core Giver Increase	66
Core Giving Increase	\$152,286

Questions:

- Are you thanking your Core givers on a quarterly basis?
- Are your Core givers actively involved with serving at the church?
- Are you offering financial classes that develop generosity within your Core giving group?
- Do you know Core givers on a personal level?

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows

LAPSED GIVERS

Lapsed Giver Churn	Household Churn Rate	Givers Lost	Giving Churn Rate	Giving Lost
Lapsed Core Givers	2.50%	443	4.10%	\$151,714
25% Less Churn	2.00%	354	3.28%	\$121,371
Improvement		89		\$30,343

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows

LAPSED GIVERS

1. Segment your giver list into these 5 different groups:

- Weekly Givers
- Monthly Givers
- Quarterly Givers
- Semi-Annual Givers
- Annual Givers

2. Time Lapsed: From the segmented lists, pull a report of time lapsed –

- Weekly Givers: 30 days lapsed
- Monthly Givers: 60 days lapsed
- Quarterly Givers: 6 months lapsed
- Semi-Annual Givers: 8 months lapsed
- Annual Givers: 13 months lapsed

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows

LAPSED GIVERS

3. **Dollar Amounts:** look at each of these segments and pull a report that shows increases or decreases in dollar amounts given.

- ☑ **Dollar amount decreases** - if the amount of money given over time has decreased, this is a potential connection opportunity for an FPU or financial education class. Discipleship in the way of generosity also might be encouraged.
- ☑ **Dollar amount increased and then lapsed** - if the amount of money given over time increased and then lapsed, it is highly likely that a significant life change has occurred. (*example: moved, died, divorced, offended by church, leadership oversight, etc.*) Connect with these people for potential counseling opportunity.

****Remember – all communication with lapsed givers should create long-lasting relationships that help them develop and grow spiritually.***

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → SEGMENT 3: CORE GIVERS

WHO

WHAT

Builds the trigger that identifies Lapsed Givers.

Calls to offer prayer and support to the giver.

Sends a personalized note after the phone call. Examples: Congrats on your move, Condolences on Loss, We Miss You, Praying for You, Sorry to See You Go

Exports the list and builds a tag for this set of givers. Review this information through the Core Givers dashboard on a quarterly basis to track your efforts.

WHEN

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → TOP GIVERS

Top Givers are those who give \$10,000.00 or more in the last 12 months to selected funds.

They typically represent the smallest percentage of your constituency (5%-10%) and the largest portion of giving (40%+). As a group, they are often mismanaged or spiritually neglected. In a large church, Top Givers are on the short list of 'who to call' when there is a financial need and yet the vast majority of them won't have a relationship with a senior pastor or leader. Top Givers should not be labeled as just rich or generous, but committed.

Value

Top Givers are the most difficult to acquire. They have the highest retention rate and gift frequency of any segment within the church. They are committed and oftentimes have the desire to give more, when asked. If taught how to give from their assets (outright, split interest, and bequest) they can exponentially accelerate giving.

Strategy

Every Top Giver should have face-time via a cup of coffee, lunch, etc. with a senior staff member/pastor. Even if there is a relationship, there is never an 'ask' for a gift, rather a need and vision is shared.

Session 3: Giving Segments, Benchmarks, Goals, Strategies & Workflows → TOP GIVERS

Steps to Discipling Top Givers

1. Identification: Segment your Age Specific Givers, Banded Givers & Top Givers
2. Planning and Evaluation: Make a Communication Plan and Evaluate Your Measurements
3. Cultivation and Preparation: Build Relationships with Top Givers & Help Them Get Involved
4. Gift Request: Share Your Vision & Ask Your Top Giver to Participate
5. Diligent Follow-up to Secure Commitment: Continue to Build Relationships and Encourage Givers to Get Involved
6. Stewardship: Provide Opportunities to Build Stewardship & Generosity, Develop an Annual Report to be Shared with Your Top Givers

PLANNED GIVING



Currently your church has 122 known age-appropriate households that could be considered for non-cash giving opportunities. ***These 122 households are giving a total of \$534,112.85 to the total annual budget, which is 48.4% of annual giving and comprise 31.7% of the church giving population.***

If these households were presented with non-cash/asset-based giving options, your funding today and for years to come has the potential to increase exponentially. On average planned gifts are 200-300 times greater than the giver's regular annual giving!

With MortarStone's planned giving strategies, you can help your givers realize tax-saving benefits and provide for ministry funding today and for the future.

Households			
	Prior Jun 29, 2018-Jun 28, 2019	Recent Jun 30, 2019-Jun 28, 2020	Difference
Under 20	3 (0.7%)	5 (1.3%)	2 (↑66.7%)
20-29	44 (10.7%)	38 (9.9%)	-6 (↓-13.6%)
30-39	48 (11.7%)	46 (12.0%)	-2 (↓-4.2%)
40-49	27 (6.6%)	23 (6.0%)	-4 (↓-14.8%)
50-59	41 (10.0%)	39 (10.2%)	-2 (↓-4.9%)
60-69	55 (13.3%)	51 (13.3%)	-4 (↓-7.3%)
70+	35 (8.5%)	32 (8.3%)	-3 (↓-8.6%)
Unknown	159 (38.6%)	150 (39.1%)	-9 (↓-5.7%)
Total	412 (100%)	384 (100%)	-28 (↓-6.8%)

Giving			
	Prior Jun 29, 2018-Jun 28, 2019	Recent Jun 30, 2019-Jun 28, 2020	Difference
Under 20	\$591.00 (0.0%)	\$1,257.08 (0.1%)	\$666.08 (↑112.7%)
20-29	\$79,269.73 (6.0%)	\$62,909.46 (5.7%)	-\$16,360.27 (↓-20.6%)
30-39	\$181,850.88 (13.8%)	\$134,708.94 (12.2%)	-\$47,141.94 (↓-25.9%)
40-49	\$93,612.90 (7.1%)	\$111,066.54 (10.0%)	\$17,453.64 (↑18.6%)
50-59	\$243,084.01 (18.4%)	\$186,893.87 (16.9%)	-\$56,190.14 (↓-23.1%)
60-69	\$311,211.27 (23.6%)	\$222,741.99 (20.2%)	-\$88,469.28 (↓-28.4%)
70+	\$130,253.66 (9.9%)	\$124,476.99 (11.3%)	-\$5,776.67 (↓-4.4%)
Unknown	\$278,732.58 (21.1%)	\$261,229.89 (23.6%)	-\$17,502.69 (↓-6.3%)
Total	\$1,318,606.03 (100%)	\$1,105,284.76 (100%)	-\$213,321.27 (↓-16.2%)

PLANNED GIVING



Currently your church has 71 households in bands 4 and 5. Bands 4 and 5 represent households giving \$5,000 or more per year.

These 71 households are giving a total of \$686,260.56 to the total annual budget, which is 62.10% of annual giving.

Households from Bands 4 and 5 comprise 18.4% of the church giving population.

Households				
	Prior Jun 29, 2018–Jun 28, 2019	Recent Jun 30, 2019–Jun 28, 2020	Difference	
Band 1	96 (23.3%)	89 (23.2%)	-7	(↓-7.3%)
Band 2	92 (22.3%)	79 (20.6%)	-13	(↓-14.1%)
Band 3	131 (31.8%)	145 (37.8%)	14	(↑10.7%)
Band 4	66 (16.0%)	52 (13.5%)	-14	(↓-21.2%)
Band 5	27 (6.6%)	19 (4.9%)	-8	(↓-29.6%)
Total	412 (100%)	384 (100%)	-28	(↓-6.8%)

Giving				
	Prior Jun 29, 2018–Jun 28, 2019	Recent Jun 30, 2019–Jun 28, 2020	Difference	
Band 1	\$6,715.35 (0.5%)	\$5,726.98 (0.5%)	-\$988.37	(↓-14.7%)
Band 2	\$48,850.38 (3.7%)	\$40,528.58 (3.7%)	-\$8,321.80	(↓-17.0%)
Band 3	\$330,141.07 (25.0%)	\$372,768.64 (33.7%)	\$42,627.57	(↑12.9%)
Band 4	\$458,750.62 (34.8%)	\$368,913.06 (33.4%)	-\$89,837.56	(↓-19.6%)
Band 5	\$474,148.61 (36.0%)	\$317,347.50 (28.7%)	-\$156,801.11	(↓-33.1%)
Total	\$1,318,606.03 (100%)	\$1,105,284.76 (100%)	-\$213,321.27	(↓-16.2%)

PLANNED GIVING

Currently your church has 19 households designated as Top Givers (*Band 5: \$10,000+ per year*). In total these household have given \$317,347.50 or 28.7% of the annual budget in the last 365 days.

These 19 households comprise 4.9% of the church giving population and 17 households are 50+ years old.

TRAILING 365 DAYS		Prior Jun 29, 2018 - Jun 28, 2019	Recent Jun 30, 2019 - Jun 28, 2020	Difference
	Households	27 (6.6%)	19 (4.9%)	-8 (↓-29.6%)
Giving	\$474,148.61 (36.0%)	\$317,347.50 (28.7%)	-\$156,801.11 (↓-33.1%)	



- 1 DESIGN**
Gift Planning Case Statement
Goals
Strategy
- 2 GIVER IDENTIFICATION**
Analytics Research
- 3 BACK OFFICE SUPPORT**
Policies
- 4 LEGAL SUPPORT**
Gift Administration
- 5 EDUCATE & TRAIN CHURCH LEADERSHIP & STAFF**
Marketing & Seminars
Case Studies
- 6 CULTIVATE & MARKET**
Giver Meetings
- 7 EDUCATE GIVERS**
Gift Strategy & Ask
- 8 REPORTING**
Church & Giver