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MEASURING WHAT MATTERS – 2021 GIVING ANALYTICS YOU SHOULD BE ASSESSING

1. Understand GIVING BANDS

Band Distribution

Number of households in each band

Explore Distribution »

Band	Households	Giving	Average	% Households	% Giving
1	4,464	$254,820.33	$57.08	36.06%	0.71%
2	2,753	$1,319,616.98	$479.34	22.24%	3.7%
3	3,088	$7,518,310.46	$2,434.69	24.95%	21.08%
4	1,138	$7,982,636.60	$7,014.62	9.19%	22.39%
5	935	$18,583,309.02	$19,875.20	7.55%	52.11%
Totals	**12,378**	**$35,658,693.39**	**$2,880.81**	**100.0%**	**100.0%**

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1. Understand GIVING BANDS

- How many Band 1 ($0-200 per year) givers do you have?
- How many Band 5 ($10,000+ per year) givers to do you have?
- Appropriate ranges for giving bands should be:

Giving Percentage Goals

- ✓ **Band 1:** 5-10% of giving
- ✓ **Band 2:** 20-25% of giving
- ✓ **Band 3:** 25-35% of giving
- ✓ **Band 4:** 15-30% of giving
- ✓ **Band 5:** 25-35% of giving

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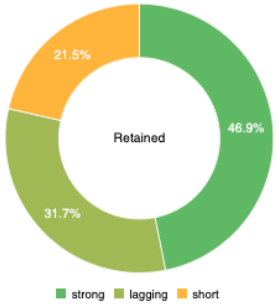
2. Measure OVERALL RETENTION

Retained Household Breakdown

Givers who gave in Aug 2018 – Jul 2019 and in Aug 2019 – Jul 2020

Strong	3,583	Households who gave more in recent period than in prior
Lagging	2,421	Households who gave between 50% and 100% of what they gave in prior period
Short	1,640	Households who gave 50% or less of what they gave in prior period



07/29/2020 to 08/27/2020 compared to the previous 30 days.		*05/30/2020 to 08/27/2020 compared to the previous 90 days.*		*03/01/2020 to 08/27/2020 compared to the previous 180 days.*	
Strong	11	Strong	727	Strong	2145
Lagging	180	Lagging	3200	Lagging	2792
Short	94	Short	1268	Short	1290

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2. Measure OVERALL RETENTION

- ***How many household have you retained this year?***

  If your number is less than 60%, you need to employ strategies to retain your giving households.
  - What is your defined discipleship pathway? Is there a gap in the process?
  - Do your givers understand what they are giving towards – Church Vision/Mission?
  - Are your ministries supporting the needs of your givers? Do you understand your community?

- ***Identify households that were strong, lagging, or short in giving.***

  - Thank and connect with strong givers
  - Connect with lagging and short givers for ministry/discipleship opportunities

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3. Track FIRST TIME to SECOND TIME

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
Jul 2019	186 (100%) $20,768.12	69 (37%) $7,517.00	64 (34%) $9,568.50	51 (27%) $8,465.00	53 (28%) $9,983.00	52 (28%) $24,834.88	48 (26%) $7,872.00	51 (27%) $13,793.30	41 (22%) $15,291.36	39 (21%) $17,151.00	42 (23%) $16,004.00	36 (19%) $12,434.00	35 (19%) $11,147.00
Aug 2019	232 (100%) $50,294.63	84 (36%) $24,511.65	70 (30%) $23,022.35	71 (31%) $23,410.78	69 (30%) $30,131.88	65 (28%) $23,077.73	63 (27%) $16,838.43	50 (22%) $16,719.94	44 (19%) $18,886.00	40 (17%) $19,200.10	39 (17%) $19,423.23	33 (14%) $10,178.00	
Sep 2019	388 (100%) $63,281.59	115 (30%) $26,819.64	119 (31%) $34,197.83	121 (31%) $57,212.24	100 (26%) $33,340.71	120 (31%) $45,775.58	118 (30%) $43,997.79	102 (26%) $49,650.68	95 (24%) $44,958.03	99 (26%) $37,707.01	86 (22%) $27,017.44		
Oct 2019	422 (100%) $128,419.65	231 (55%) $91,585.51	223 (53%) $183,385.06	202 (48%) $84,797.53	204 (48%) $80,231.26	175 (41%) $79,466.03	164 (39%) $96,997.08	160 (38%) $87,139.77	149 (35%) $92,528.53	142 (34%) $74,795.68			
Nov 2019	284 (100%) $60,730.97	108 (38%) $61,875.68	83 (29%) $19,032.71	80 (28%) $17,660.36	73 (26%) $21,991.00	63 (22%) $26,528.86	52 (18%) $19,844.79	48 (17%) $17,218.22	47 (17%) $16,598.58				
Dec 2019	557 (100%) $300,511.28	104 (19%) $26,713.72	100 (18%) $19,975.50	99 (18%) $29,482.97	78 (14%) $27,491.00	78 (14%) $30,122.51	69 (12%) $26,560.18	64 (11%) $44,498.06					
Jan 2020	404 (100%) $46,613.12	153 (38%) $29,216.54	128 (32%) $28,781.49	104 (26%) $30,043.58	99 (25%) $26,091.29	87 (22%) $22,310.34	79 (20%) $20,321.33						
Feb 2020	374 (100%) $71,544.08	125 (33%) $26,445.39	90 (24%) $31,877.36	87 (23%) $28,161.54	73 (20%) $18,524.19	68 (18%) $23,038.44							
Mar 2020	460 (100%) $80,473.02	176 (38%) $40,967.15	174 (38%) $50,531.99	142 (31%) $35,358.14	121 (26%) $24,057.22								
Apr 2020	272 (100%) $59,556.62	122 (45%) $38,931.30	106 (39%) $22,426.41	95 (35%) $58,679.00									
May 2020	169 (100%) $54,138.62	67 (40%) $12,159.00	63 (37%) $14,415.00										
Jun 2020	111 (100%) $22,590.01	32 (29%) $8,478.81											
Jul 2020	117 (100%) $48,654.76												
Totals	3976 (100%) $1,007,576.47	1386 (36%) $395,221.39	1220 (33%) $437,214.20	1052 (29%) $373,271.14	870 (26%) $271,841.55	708 (25%) $275,154.37	593 (24%) $232,431.60	475 (23%) $229,019.97	376 (25%) $188,262.50	320 (26%) $148,853.79	167 (21%) $62,444.67	69 (17%) $22,612.00	35 (19%) $11,147.00

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3. Track FIRST -TIME to SECOND-TIME

- Look back 1 year and **track how many NEW Givers you've retained**.
- How much giving was **retained over the last year**?
- If your **retention is under 30%,** then what can you do **to retain more NEW givers**?
  - Evaluate Assimilation Processes
  - Are You Thanking New Givers
  - Is Someone on Staff Reaching Out to Build Relationships
  - Do Your First-Time Givers Know What Ministries the Church Offers

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4. Track ACQUIRED GIVING – 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
Jul 2019	252 (100%) $113,568.30	160 (63%) $50,178.11	145 (58%) $50,553.15	131 (52%) $45,980.92	140 (56%) $50,765.63	152 (60%) $80,329.63	127 (50%) $49,687.43	134 (53%) $53,765.52	126 (50%) $55,749.47	114 (45%) $55,203.25	122 (48%) $64,519.76	109 (43%) $61,516.87	100 (40%) $43,584.86
Aug 2019	315 (100%) $174,633.09	218 (69%) $91,097.29	194 (62%) $76,535.72	202 (64%) $90,332.20	201 (64%) $115,929.75	200 (63%) $79,494.01	194 (62%) $87,348.13	200 (63%) $94,750.68	180 (57%) $104,221.67	182 (58%) $116,116.79	157 (50%) $75,164.16	141 (45%) $61,330.18	
Sep 2019	357 (100%) $184,418.92	230 (64%) $84,404.60	225 (63%) $100,927.50	226 (63%) $153,364.84	200 (56%) $86,833.61	213 (60%) $111,980.57	206 (58%) $100,495.85	187 (52%) $121,312.27	180 (50%) $109,469.37	175 (49%) $98,946.56	164 (46%) $73,172.37		
Oct 2019	429 (100%) $228,280.31	319 (74%) $152,012.33	331 (77%) $259,752.15	299 (70%) $135,750.17	296 (69%) $140,960.88	282 (66%) $141,557.26	263 (61%) $150,193.42	257 (60%) $149,386.87	240 (56%) $136,658.08	225 (52%) $121,118.30			
Nov 2019	395 (100%) $221,936.76	313 (79%) $268,684.34	274 (69%) $119,825.87	274 (69%) $115,816.20	254 (64%) $110,895.48	225 (57%) $134,759.23	222 (56%) $124,768.80	212 (54%) $107,285.57	195 (49%) $92,965.54				
Dec 2019	568 (100%) $536,715.82	304 (54%) $113,902.70	294 (52%) $119,914.23	292 (51%) $136,065.98	256 (45%) $133,053.78	254 (45%) $142,102.34	246 (43%) $121,013.42	223 (39%) $146,950.04					
Jan 2020	369 (100%) $172,521.18	269 (73%) $89,566.40	244 (66%) $95,914.39	216 (59%) $103,446.19	209 (57%) $94,530.27	197 (53%) $79,604.45	179 (49%) $103,525.85						
Feb 2020	465 (100%) $216,515.31	306 (66%) $121,581.47	276 (59%) $130,120.37	275 (59%) $137,947.73	241 (52%) $104,783.45	225 (48%) $93,646.07							
Mar 2020	483 (100%) $249,383.19	317 (66%) $151,330.42	329 (68%) $151,166.69	271 (56%) $115,667.47	251 (52%) $98,881.67								
Apr 2020	514 (100%) $273,010.55	394 (77%) $171,634.74	339 (66%) $135,152.47	303 (59%) $154,530.78									
May 2020	453 (100%) $260,662.59	304 (67%) $115,301.42	280 (62%) $172,790.39										
Jun 2020	309 (100%) $136,789.35	210 (68%) $112,032.38											
Jul 2020	264 (100%) $141,900.91												
Totals	5173 (100%) $2,910,336.28	3344 (68%) $1,521,726.20	2931 (64%) $1,412,652.93	2489 (60%) $1,188,902.48	2048 (56%) $936,634.52	1748 (55%) $863,473.56	1437 (54%) $737,032.90	1213 (52%) $673,450.95	921 (53%) $499,064.13	696 (51%) $391,384.90	443 (48%) $212,856.29	250 (44%) $122,847.05	100 (40%) $43,584.86

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4. Track ACQUIRED GIVING – CORE GIVERS

- Look back 1 year and track how many CORE Givers you've retained.
- How much giving was retained over the last year?
- If your retention is under 50%, then what can you do to retain more CORE givers?
  - Offer financial courses
  - Thank CORE Givers
  - Have Pastors reach out to form a relationship
  - Get CORE Givers involved with ministry service

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5. Track MOVEMENT – CORE GIVERS

Band Flow Diagram

How households moved between bands year over year

	Aug 2019 – Jul 2020 →					
Aug 2018 – Jul 2019 ↓	Band 1	Band 2	Band 3	Band 4	Band 5	Lapsed
Band 1	1,109	350	115	15	5	3,046
Band 2	437	885	401	25	6	792
Band 3	81	437	1,674	303	54	414
Band 4	3	28	207	577	156	57
Band 5	2	6	45	94	639	28

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5. Track MOVEMENT– CORE GIVERS

- Over the last year, how many CORE Givers have upgraded in giving?
- Over the last year, how many CORE Givers have downgraded in giving?
- Click on each highlighted blue numbers to identify the people attached to the dollars
  - Reach out to CORE givers that have decreased giving
  - Thank CORE Givers that have increased
  - Have Pastors reach out to form a relationship

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6. Understand TOP GIVER DEMOGRAPHICS

TRAILING 365 DAYS		Prior Aug 28, 2018–Aug 27, 2019	Recent Aug 29, 2019–Aug 27, 2020	Difference
	Households	812 (6.8%)	840 (7.0%)	28 (↑3.4%)
	Giving	$16,154,384.51 (50.3%)	$16,612,001.39 (49.7%)	$457,616.88 (↑2.8%)

a. 41 Trillion is expected to transfer even in light of the current economic conditions. How much could go to the Kingdom?

b. Estimated $12 Trillion is expected to go to charity but could it be more?

c. Among those who are over the age of 50 and give at least $500 a year to a charitable organization, Less than 9.5% of people have a charitable estate plan.

d. Without education and proper planning 90% of givers mortality will simply result in lost current giving.

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6. Understand TOP GIVER DEMOGRAPHICS

a. Build sustainable long-term funding by following these 7 steps.

a. MortarStone works with Kingdom Planning Strategies to help you build your Gift Planning ministry.

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7. Build TRIGGERS – LISTS - NOTIFICATIONS

- **Build a Trigger/List** that identifies new giving households
- **Build a Trigger/List** that identifies givers that have increased their giving or decreased giving
- **Build a Trigger/List** that identifies givers that have not given in the last 30-60 days
- **Build a Trigger/List** that identifies givers that did not give a second time
- **Build a Trigger/List** that identifies givers that have increased in bands

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8. Monitor Monthly & Adjust Strategy

1. Manage what You Measure
2. Build Strategies to Meet Your Goals
3. Become Less Reactionary – Plan and Forecast Funding
4. Get Help – MortarStone Offers 2-Day Virtual Trainings and Yearly Coaching Programs

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Q/A

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