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What We Learned during COVID…

PIVOT

2

THINGS THAT HAVE MADE US BETTER

3 WAYS

1	**Collaboration**
2	**Laser Focus**
3	**The Easy Button**

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Collaboration

How to collaboratively work as a church team to manage and monitor budgets

- Closures forced us to become better communicators.
- Virtual collaboration taught us the value of partnership between ministries and support staff.
- Mandating tasks, like budgeting, took on a more productive process through cross-functional collaboration.
- Bottom-up budgeting may be our new normal.

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Bottom-Up

Budgeting – New Normal

- Bottom-up budgets allow those with "boots on the ground" to create more accurately determined assumptions due to their proximity to the "assumptions".

Program leaders are capable of contributing valuable insight into –

- How best to align their activities with the overall mission of the church
- Set goals that track success
- How to pivot when unnecessary expenses are negatively impacting their outcomes

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Which Budgeting Approach Do You Use?

- ○ **TOP DOWN**
- ○ **BOTTOM UP**

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Laser Focused

Weeding Out Need vs. Want

- Collaboration between leaders and ministry heads creates a cohesive foundation that keeps priorities and outcomes front and center.
- Collaboration helps in identifying those activities that have the highest leverage on reaching the organizational goals and then in turn distribute limited cost resources accordingly.
- Budgeting is not just a table of numbers; it is a puzzle that takes a team to put together.

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How Often Do You Need to Revise the Budget in a Fiscal Year?

- Never
- 2 Times
- More than 2 times

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The Easy Button

The Ability to Create Budgets with Ease and Accuracy

- Complicated systems reap detours and drop-outs. In our "push button" society, budgeting software must be:

  1.) Easy to use

  2.) Easy to review

  3.) Easy to track

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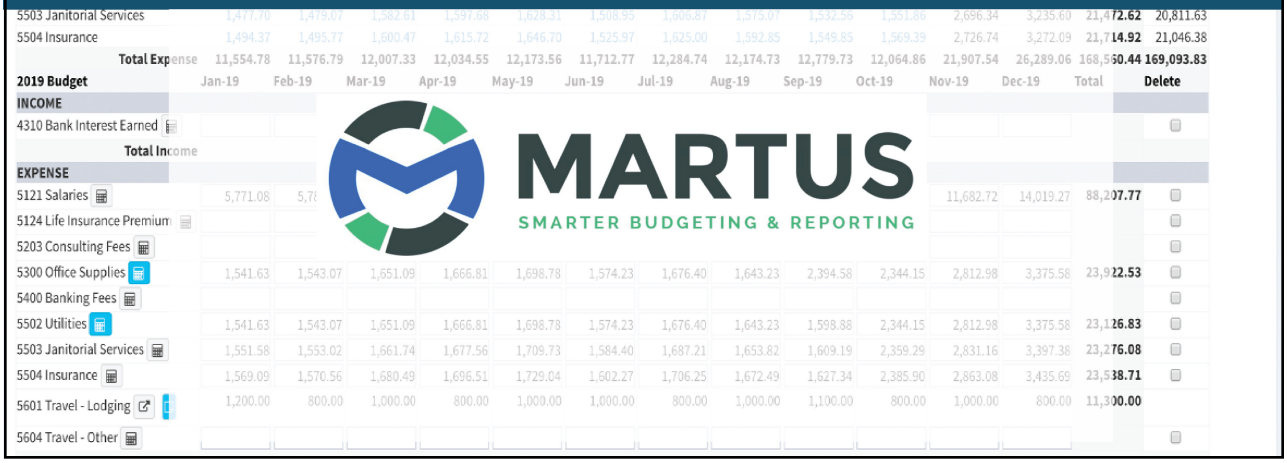
Let's Take a Look…

Inside Look at Martus Budgeting & Reporting Software



2019 Budget	Jan-19	Feb-19	Mar-19	Apr-19	May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Total	Delete
5503 Janitorial Services	1,477.70	1,479.07	1,582.61	1,597.68	1,628.31	1,508.93	1,606.67	1,575.07	1,532.58	1,551.86	2,696.34	3,235.60	21,472.62	20,811.63
5504 Insurance	1,494.37	1,495.77	1,600.47	1,615.72	1,646.70	1,525.97	1,625.00	1,592.85	1,549.85	1,569.39	2,726.74	3,272.09	21,714.92	21,046.38
Total Expense	11,554.78	11,576.79	12,007.33	12,034.55	12,173.56	11,712.77	12,284.74	12,174.73	12,779.73	12,064.86	21,907.54	26,289.06	168,550.44	169,093.83
INCOME														
4310 Bank Interest Earned														
Total Income														
EXPENSE														
5121 Salaries	5,771.08	5,78									11,682.72	14,019.27	88,207.77	
5124 Life Insurance Premium														
5203 Consulting Fees														
5300 Office Supplies	1,541.63	1,543.07	1,651.09	1,666.81	1,698.78	1,574.23	1,676.40	1,643.23	2,394.58	2,344.15	2,812.98	3,375.58	23,922.53	
5400 Banking Fees														
5502 Utilities	1,541.63	1,543.07	1,651.09	1,666.81	1,698.78	1,574.23	1,676.40	1,643.23	1,598.88	2,344.15	2,812.98	3,375.58	23,126.83	
5503 Janitorial Services	1,551.58	1,553.02	1,661.74	1,677.56	1,709.73	1,584.40	1,687.21	1,653.82	1,609.19	2,359.29	2,831.16	3,397.38	23,276.08	
5504 Insurance	1,569.09	1,570.56	1,680.49	1,696.51	1,729.04	1,602.27	1,706.25	1,672.49	1,627.34	2,385.90	2,863.08	3,435.69	23,538.71	
5601 Travel - Lodging	1,200.00	800.00	1,000.00	800.00	1,000.00	1,000.00	800.00	1,000.00	1,100.00	800.00	1,000.00	800.00	11,300.00	
5604 Travel - Other														

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Current Church Giving

Trends in Giving from January 2020 to Now

1.) Overall Giving Has Plateaued

2.) Sharp Decline in New Givers

3.) Top Givers – Carrying the Load

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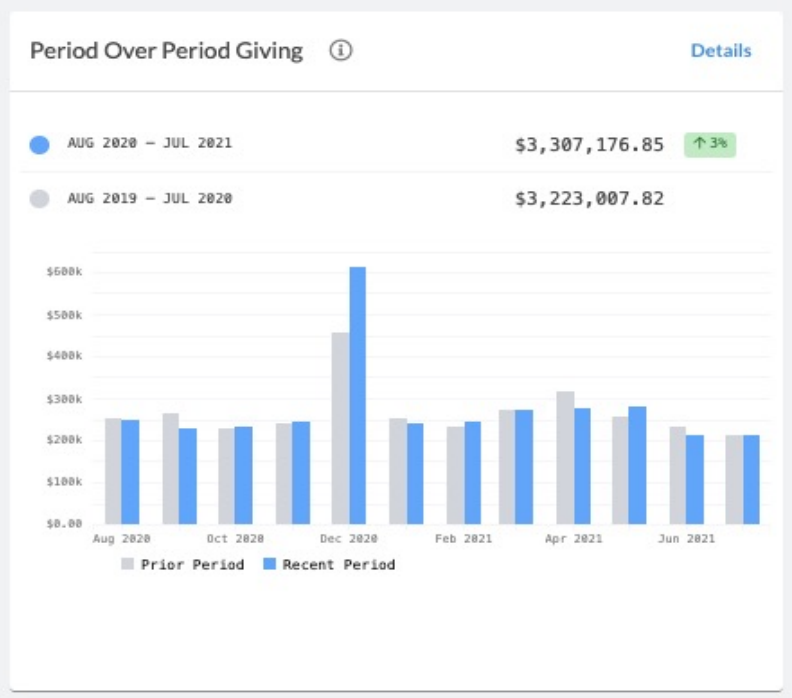

Overall Giving Has Plateaued

- COVID giving initially saw an increase but as the pandemic continued, giving began to plateau.

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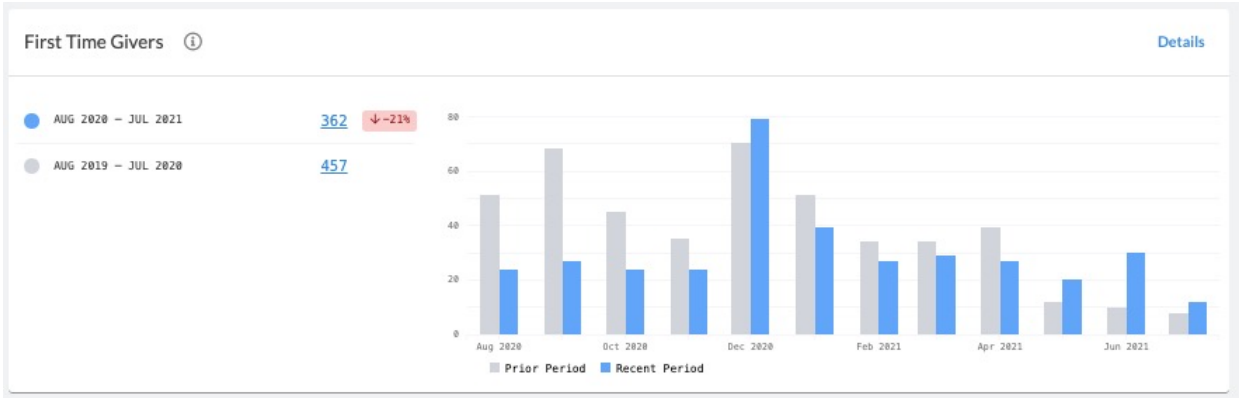

New Givers Have Declined

- Engagement & Giving by New Givers has decreased.

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Band	Households	Giving	Average	% Households	% Giving
1	192	$14,773.32	$76.94	14.86%	0.26%
2	262	$131,129.08	$500.49	20.28%	2.28%
3	502	$1,274,317.81	$2,538.48	38.85%	22.12%
4	204	$1,416,898.59	$6,945.58	15.79%	24.59%
5	132	$2,924,780.81	$22,157.43	10.22%	50.76%
Totals	1,292	$5,761,899.61	$4,459.67	100.0%	100.0%

Top Givers – Band 5 ($10K + per year)

- Top Givers are the minority of the giving population, but are supporting the majority of church funding.

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Encouraging Generosity

Strategies for Financially Discipling Givers

1. Thank New Givers *(handwritten notes are read 300% more than email)*
2. Connect Second Time Givers with Church Ministries
3. Identify Givers with Giving Patterns *(givers that have increased, decreased, or stopped giving)*
4. Offer Education & Non-Cash Giving

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Do you track the percentage of new givers that give a second time?

- Yes
- No
- Not sure

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Second Time Giver Tracking

Second Time Givers

	Sep 2019 – Aug 2020	Sep 2020 – Aug 2021	
First-time Givers	430	359	↓ -17%
2nd Gift In Period	63.5%	54.9%	↓ -14%
No 2nd Gift In Period	36.5%	45.1%	↑ 24%

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New Giver Triggers & Lists

LISTS First time Givers (MS Demo Test) results

Edit Delete

8 Households

0 households selected Export + Add Household

Select	Family	Tags	Added	Last Gift TO ANY FUND	Total Giving TO DEFAULT FUNDS
	Sara Breland Newport Beach	Recent, New, Lapsed, 1st time gift - past month, Given between 20 - 55 gifts	10/21/2020	$20.00 11 months ago	$20.00 Since Oct 18, 2020
	Lavanya Crum Costa Mesa	Recent, New, Lapsed, 1st time gift - past month	10/21/2020	$15.00 5 months ago	$25.00 Since Oct 18, 2020
	Madison Griffin Newport Beach	Recent, New, Lapsed, 1st time gift - past month, Given between 20 - 55 gifts	10/21/2020	$25.00 4 months ago	$100.00 Since Oct 18, 2020
	Diane Hamby Newport Beach	Recent, New, 1st time gift - past month, Given between 20 - 55 gifts	10/21/2020	$15.00 5 months ago	$175.00 Since Oct 18, 2020
	Sarai Little Newport Beach	Recent, New, Lapsed, 1st time gift - past month, Given between 20 - 55 gifts	10/21/2020	$400.00 6 months ago	$450.00 Since Oct 18, 2020
	Allison Reid Newport Beach	Recent, New, Lapsed, 1st time gift - past month, Given between 20 - 55 gifts	10/21/2020	$100.00 9 months ago	$757.00 Since Jan 12, 2020
	Piper and Seth Wilkerson	Recent, New, 1st time gift - past month	10/21/2020	$80.00 17 days ago	$635.00 Since Oct 18, 2020

Mass Actions
- Assign tags
- Assign tasks
- Complete tasks
- Add connections
- Copy/Move
- Remove

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The average large church loses 10 giving households for every 7 gained over a 12-month period – a 30% loss.

Do you know your percentage?

- ○ **Yes**
- ○ **No**
- ○ **Not sure**

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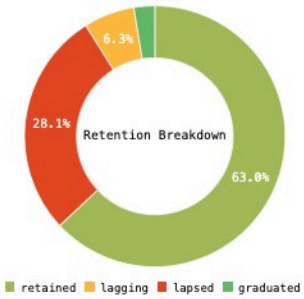
Retention of Core Givers

Raw Retention

How are core givers from Sep 2020 – Aug 2021 giving in Sep 2019 – Aug 2020?

Details

Graduated - Became a top giver in the recent period	20
Retained - Continued as a core giver in the recent period	489
Lagging - Dropped to band 1 in the recent period	49
Lapsed - Did not give in the recent period	218



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Age Distribution of Giving Households

Age Distribution

Households

	Prior Sep 02, 2019–Aug 31, 2020	Recent Sep 01, 2020–Aug 31, 2021	Difference
Under 20	21 (1.7%)	32 (2.7%)	11 (↑52.4%)
20-29	76 (6.0%)	85 (7.2%)	9 (↑11.8%)
30-39	138 (10.9%)	140 (11.9%)	2 (↑1.4%)
40-49	212 (16.8%)	184 (15.6%)	-28 (↓-13.2%)
50-59	203 (16.1%)	176 (14.9%)	-27 (↓-13.3%)
60-69	178 (14.1%)	170 (14.4%)	-8 (↓-4.5%)
70+	104 (8.2%)	98 (8.3%)	-6 (↓-5.8%)
Unknown	331 (26.2%)	296 (25.1%)	-35 (↓-10.6%)
Total	1,263 (100%)	1,181 (100%)	-82 (↓-6.5%)

TRAILING 365 DAYS

Giving

	Prior Sep 02, 2019–Aug 31, 2020	Recent Sep 01, 2020–Aug 31, 2021	Difference
Under 20	$5,140.65 (0.2%)	$15,318.24 (0.5%)	$10,177.59 (↑198.0%)
20-29	$165,946.29 (5.2%)	$178,325.51 (5.4%)	$12,379.22 (↑7.5%)
30-39	$389,280.71 (12.3%)	$419,350.61 (12.7%)	$30,069.90 (↑7.7%)
40-49	$620,406.41 (19.5%)	$645,185.84 (19.5%)	$24,779.43 (↑4.0%)
50-59	$734,026.41 (23.1%)	$775,613.89 (23.5%)	$41,587.48 (↑5.7%)
60-69	$668,836.56 (21.0%)	$674,990.69 (20.4%)	$6,154.13 (↔0.9%)
70+	$279,614.24 (8.8%)	$261,088.02 (7.9%)	-$18,526.22 (↓-6.6%)
Unknown	$314,511.77 (9.9%)	$331,574.28 (10.0%)	$17,062.51 (↑5.4%)
Total	$3,177,763.04 (100%)	$3,301,447.08 (100%)	$123,684.04 (↑3.9%)

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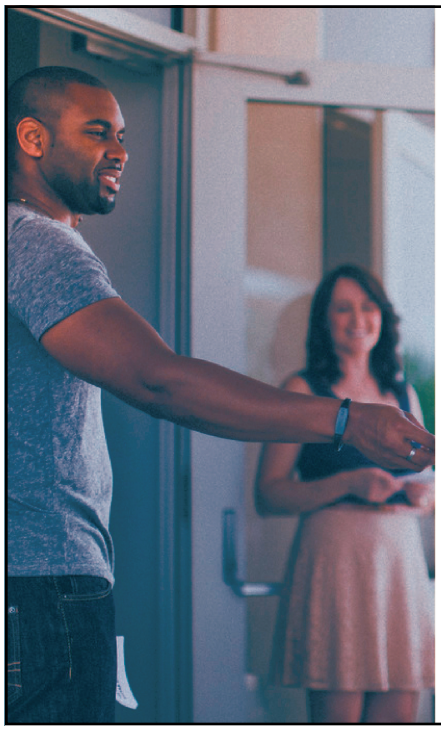

WEBINAR SPECIAL

- Sample End of Year campaigns (letters, landing pages and thank you templates)
- Church Health Report. Learn how well your church is discipling givers with a comprehensive giving analysis
- Customized Martus Demo – Info.moartussolutions.com/mortarstone

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