

If you build it: guidance on creating the giving profile

The giving profile really matters. The giving profile spreadsheet makes it easy to chart this information but care is needed. This paper offers guidance on entering the data to generate the charts and assessing which charts are appropriate for your church. Please read it carefully.



Before following this practical guidance please read *Lifting the Bonnet* found at the *Giving Profile tab* for background information on giving profiles, skew and median and average giving.

To begin, download the *Weekly Giving Profile* spreadsheet from the Giving Profile tab. The information you need is found in church's planned giving records. Include regular planned giving from the Parish Giving Scheme, from standing orders and any weekly envelopes. Some may use a Stewardship or other charitable giving account; treat any payroll giving as tax efficient.

Confidentiality

The planned giving profile is a wholly anonymous exercise. If a Planned Giving Officer is not entering this data they should remove all names to preserve confidentiality. The exercise requires only the financial totals for each planned giver and whether there is a valid Gift Aid declaration or not.

Please note carefully

The automatic calculations in this spreadsheet require a version of Microsoft Excel that is 2007 or later and the 'Calculation Options' set to 'Automatic' (File menu: select Options and then the Formulas menu).

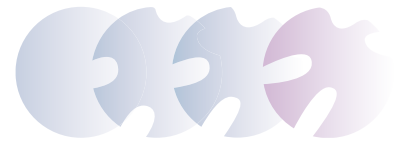
Building the giving profile

1. The Excel spreadsheet contains five tabs: *Data Entry Sheet*, *Analysis Ranges*, *TEPG & OPG Analysis*, *Total Planned Giving Analysis* and *TPG Analysis - small*. A sixth tab, *Working Tables*, can be ignored. The worksheets are protected but there is no password.
2. Start with the first worksheet: *Data Entry Sheet*. Enter the relevant year number into the green cell (G4).
3. Within the light blue highlighted cells (starting at Row 9), each row will record the giving of one person or one giving 'unit', e.g. a couple.
 - a. In the light blue highlighted Column A, headed Annual Total, enter the total annual gift from each person/giver. This total is the sum of regular planned gifts, please exclude additional one-off or occasional gifts unless they are known to be part of a pattern of regular giving.
 - b. In the light blue highlighted Column B headed, *Valid Gift Aid* simply enter 'Y' if the gifts are given under a valid Gift Aid declaration. Enter an 'N' if they are not.
 - c. Please note the anonymous giving information can be entered in any order and does not need sorting.

When this data entry is done the information and the charts on the three worksheets *TEPG & OPG Analysis* and *Total Planned Giving Analysis* and *TPG Analysis - small*, are automatically created and ready for printing.

Analysis ranges

Please note that the charts and tables are generated using some default *per person weekly giving* ranges, e.g. £1 – £2.49. These default ranges will work for most churches but can be modified on the *Analysis Ranges* worksheet.



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1. Each table and chart uses 9 ranges; the first range on each table will always start with zero.
2. Modify the analysis ranges by changing the values in the colour highlighted cells of Column C, headed Band Range. The first band range is set in cell C14 at £1. So the first range is £0-£0.99. The second range is set in cell C15 at £1.50. The second range is therefore from £1 to £2.49. And so on.
3. Edit the ranges to suit the pattern of giving in your church. To illustrate: set the range in cell C14 to £2; your first band range is now £0-£1.99. Adjust other ranges to reflect your church context.

The yellow highlighted cells in rows 14–21 provide the ranges for both the Tax Efficient Planned Giving (TEPG) chart and the Total Planned Giving (TPG) chart. The blue highlighted cells in rows 28–35 provide the ranges for the Other Planned Giving (OPG) chart.

Confidentiality again

Ideally, each range should contain several givers, two or three at least. If the default ranges do not make this possible you should modify the range values to maintain the anonymity of givers. You cannot reduce the number of analysis ranges from the default 9.

Which giving profile?

Your data entry automatically populates three worksheets. Choose the worksheet that best reflects your church context. **Only one of the planned giving profiles should be included in your Case Statement document.** So which is right for you?

TEPG & OPG Analysis

If your church has a reasonable number of both tax efficient planned givers (TEPG) and non Gift Aid other planned givers (OPG) then use the giving profile in the *TEPG & OPG analysis worksheet*. This sheet charts TEPG and OPG giving separately because level and range of giving is usually significantly different.

Total Planned Giving Analysis

However, if your church has a lower number of planned givers then separating TEPG and OPG giving may not show a clear picture or may risk confidentiality. It may be helpful to profile all planned giving together. For this situation choose between two worksheets: either the *Total Planned Giving Analysis* or *TPG Analysis - small*. Both worksheets chart all planned giving together. The only difference is the scale of the top chart. Choose the chart which works best for you.

The average and median gift

For each planned giving chart, the average planned

giving is calculated and displayed above the median giving amount. The median more accurately assesses giving by moving the effects of skew caused by a smaller number of big givers in the church. For more on skew and the median, see *Lifting the Bonnet*.

The 80–20 rule

The bottom chart on each of the Analysis worksheets is called *Given v Givers*. This chart shows the proportion of total money given by a proportion of planned givers. On the left of the chart the steep rise of the red line is because a few people are giving a large part of the total giving in this church. So, the green vertical line marks 20% of givers. This green line intersects the red line at 60% of the vertical % amount given. This means that 20% of givers are gifting 60% of total giving.



It indicates the skew in planned giving. The greater the proportion given by the top 20% of givers, the steeper the red line and greater reliance by the church on these few givers in order to deliver its mission.

Including in the Case Statement

Once you have decided which worksheet to use, it can be printed in colour to hard copy or to a PDF for a shared drive or email circulation. It is paginated as 'Page 6'. Alternatively, as per earlier guidance, copy and paste into Page 6 of your evolving Case Statement, perhaps as a graphic if the resolution is adequate.