

## 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.



Download the *Weekly Giving Profile* spreadsheet from under *Building the Case* in the *Financial Analysis* section at the *Giving profile* tab. This paper should be read alongside *Lifting the Bonnet*, found at the same tab.

All the information you need should be available from the church's planned giving records. Remember to include any standing orders, direct debits and giving via a charity account as well as the weekly giving envelopes. For simplicity, if the number of any payroll givers is known, then treat their giving as tax efficient, as if they had signed a Gift Aid declaration. If the number of payroll givers is not known, then exclude these donations from the analysis.

If the Planned Giving Officer is not entering this data, he or she should remove names to preserve confidentiality. For data entry all that is needed are the financial totals for each planned giver and whether there is a valid Gift Aid declaration or not – see below.

### Please note carefully

For the automatic calculations in this spreadsheet to function correctly, *an Excel version that is 2007 or newer must be used and the 'Calculation Options' should be set to 'Automatic'* (refer to Excel's help files for detailed instructions).

### Building the giving profile

1. When the file is opened, five worksheets should be found (*Data Entry Sheet, Analysis Ranges, TEPG & OPG Analysis, Total Planned Giving Analysis and TPG Analysis - small*).
2. Start with the *Data Entry Sheet* worksheet. Enter the relevant year number into the green cell (G4).
3. Within the light blue highlighted cells (starting at Row 9), each row should be used to record information relating to one person/giver.
  - a. In the first column of light blue highlighted cells (col A - Annual Total), enter the total annual donation from each person/giver, given as part of their regular planned giving.
  - b. In the second column of light blue highlighted cells (col B - Valid Gift Aid), enter a 'Y' if the person/giver has a valid Gift Aid declaration. Enter an 'N' if they do not.
  - c. Please note that the data relating to each giver may be entered in any order and does not have to be sorted by the amount given.

When this is done, the basic task is complete. The information and charts found on the three worksheets *TEPG & OPG Analysis* and *Total Planned Giving Analysis and TPG Analysis - small*, are automatically created and ready for printing. However, first consider the additional guidance below.

### Analysis ranges

The charts and tables are generated using the default *per person weekly giving* ranges, e.g. £1 – £2.49. If these default ranges are not appropriate



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for the giving received by your church, they are easily modified using the *Analysis Ranges* worksheet as follows:

1. Click to the *Analysis Ranges* worksheet. Each table and chart uses 9 ranges; the first range on each table will always start with zero.
2. Within the yellow highlighted cells (col C - Band Range), enter the size of each individual range. As each value is entered, the displayed range will change automatically.
  - a. The first set of highlighted cells (rows 14–21) provides the ranges for both the Tax Efficient Planned Giving (TEPG) chart and the Total Planned Giving (TPG) chart.
  - b. The second set of highlighted cells (rows 28–35) provides the ranges for the Other Planned Giving (OPG) chart.

Ideally, each range should contain at least two givers. However, if this is not possible, then consideration should be given to setting range values that maintain the anonymity of givers.

### Which giving profile is right for your church?

Two separate giving profiles are generated by the giving data you enter. One profile separates out tax-efficient and other planned giving (*the TEPG & OPG Analysis worksheet*). The other combines the two (*Total Planned Giving Analysis and TPG Analysis - small*). **Only one of the profiles should be chosen and used for your Case Statement document.** So which is right for you?

### TEPG & OPG Analysis

If your church has a reasonable number of both Gift Aid (TEPG) and non-Gift Aid (OPG) planned givers, use the giving profile in the *TEPG & OPG analysis worksheet* to chart the amounts given by these groups separately. This is principally because the level and range of giving tends to be significantly different between these two groups.

### Total Planned Giving Analysis

However, if your church has a low number of planned givers, separating the Gift Aid and non-Gift Aid giving may not show a clear picture or may risk confidentiality. In this situation it may be more helpful to look at the overall planned giving profile. In this case use the second or third worksheets, *Total Planned Giving Analysis or TPG Analysis - small*, these provide one chart covering all the planned giving of the church. The only difference between the two worksheets is in the scaling of the uppermost chart. You choose the chart which works best for you.

Once you have decided which worksheet to use, it should be printed in colour (wherever possible) and inserted into the Case Statement document. The printout will already be paginated as 'Page 6'.

### The average and median gift

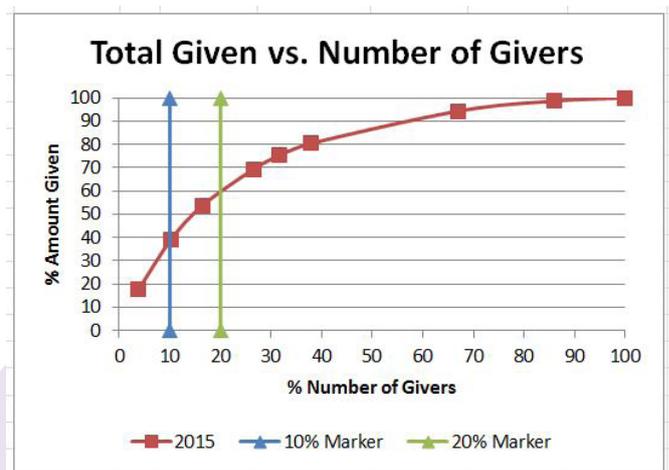
For each planned giving chart, the average planned giving is calculated and displayed above the median giving amount. The median more accurately assesses giving by removing the effects of skew caused by a few big givers in the church. For more on skew and the median, see *Lifting the Bonnet*.

### The 80-20 rule

The final chart on each giving profile page is called *Given v Givers*. This chart shows the proportion of money given by a proportion of the planned givers.

The chart shows the highest-giving givers at the left of the chart first and the lowest towards the end, on the right. A green line marks the top 20% of givers (the top fifth of givers). Reading the vertical scale at the point where the green line and red curve intersect will tell you the proportion of all planned giving that is given by this top 20% of givers.

(fig.1)



In fig.1 the green line crosses the red curve just before the 60% given point. In this church, the top 20% of planned givers contribute roughly 60% of all the planned giving received, a clear indication of the level of skew in the giving of the church. The greater the proportion given by the top 20% of givers, the more reliance the church has on these few givers in order to deliver its mission.