

Dashboard instructions

The finance dashboard makes readily available financial data accessible in a graphical format and adds questions for discussion at a finance or stewardship committee. This paper offers practical guidance on entering data into the spreadsheet and producing the linked dashboard document for printing.



The *Giving in Grace* finance dashboard is a tried and tested tool, a printable booklet which presents financial data in accessible form and encourages discussion on the implications of that data. Please read and follow the guidance in this paper carefully.

In brief

The finance dashboard comprises of two linked documents:

1. *An Excel workbook*: your church's financial data is entered into this Excel workbook which will automatically generate the necessary charts and tables.
2. *A Word document*: once you have entered all your church's data into the spreadsheet, you open the Word document and respond 'Yes' to update the links. The financial graphs and charts in the document will automatically configure themselves to your information from the spreadsheet.

The Word document may then be printed to paper or saved as a PDF file for distribution to your Church Council, finance or stewardship committee.

Requirements

In order to generate the finance dashboard you will need first to ensure that you have the following to hand:

- Versions of Excel and Word that are Microsoft Office 2007 or later.
- Church accounts covering a range of up to five consecutive years; the more data the richer your dashboard
- The numbers of your planned givers for each year in your range, broken down between Tax Efficient Planned Givers (TEPG) and Other Planned Givers (OPG) – that is, those on whose giving Gift Aid cannot be claimed. Please ensure this includes all weekly giving envelopes (cash and cheques), standing orders, Direct Debits (where appropriate) and those giving via a charity giving account (e.g. Stewardship or CAF)

How to generate your Dashboard

1. From the [finance dashboard web page](#) click the Finance Dashboard files link in the Downloads box. This is a zipped file and will automatically create a compressed folder named "GiG-DB" in your download folder. Now, this compressed file contains a folder called *GiG-Dashboard*, in fact, this may well be the folder you first see on screen. It is this *GiG-Dashboard* folder which you will extract from the compressed folder and save to your hard disk.
2. To do this, from your download folder, right mouse click on the compressed folder "GiG-DB" (not the GiG-Dashboard folder) and choose "Extract All..." from the menu. Click browse and choose the folder 'C:\' (also known as the root of drive C) as the destination for the extracted files.

Important: the *GiG-Dashboard* folder must be extracted to 'C:\' for the links between the Word document and Excel spreadsheet to work correctly. If you accidentally place the *GiG-Dashboard* folder in the wrong place, simply find where you have placed the files and double left mouse click the 'GiG-Dashboard.BAT' file. This will copy the necessary files to the correct place. You can then delete the files from the 'wrong' folder. Alternatively 'cut and paste' or move the *GiG-Dashboard* folder to the C:\ location.

3. Open your 'C:\GiG-Dashboard' folder and, as usual, double click to open the Excel workbook *Dashboard-Data.xlsx*. This Excel workbook has two worksheets in it, that is, tabs at the bottom of the screen. Select the worksheet called *Data Entry Sheet*. All the cells that are colour highlighted are unprotected and the cell value may be modified.
4. Enter a short version of your church's name in cell B1, replacing <Name>.
5. Enter the start year value into cell B2. If reporting the time period 2011 to 2015, then enter '2011' in cell B2; if reporting the period 2012 to 2016, then enter '2012' in cell B2. If you enter less than five year's worth of data, don't worry. The graphs will simply have zero values for the missing years.

For the next steps you will need your church accounts for up to five years previous years.

6. Following the summary headings as shown in column A and for each available year, enter the church's unrestricted *income* into the yellow coloured cells B4 to F14.
7. Similarly to step 6 above, now enter the church's unrestricted *expenditure* in the light green coloured cells B18 to F27. Please note that the summary headings provided in the darker green coloured cells A18 & A19 may be modified if you prefer different headings.
8. Enter the relevant numbers of your regular planned givers in the light blue coloured cells B32 to F33.



9. Enter your unrestricted cash asset values in the pink coloured cells B38 to F38. Do not include any *tangible* assets within these values: that is to say, no buildings nor equipment.
10. If you generate your accounts in an *Accruals* format, then you will also need to enter the 1 year Debtors and Creditors/Liabilities values in the orange coloured cells B39 to F40. However, if you generate *Receipts & Payments* accounts, then these Debtor and Creditor values are purely optional.
11. Enter any investment assets, at their year-end values, in the bronzed orange coloured cells B42 to F42. Investment assets would normally include shares and bonds whose cash values can fluctuate from year to year.

Using Comparators - optional

OK. That's all your own financial data entered on the spreadsheet. If you click to the worksheet called Charts, the tab at the bottom of the page, you will see that all the graphs and charts for your church have been created.

Now, optionally it may be helpful if you can to compare your own church with other churches – assuming, of course, that you can easily get that information. All you need is the *average per Person per Week giving figures for each year*.

For example, each Anglican church is part of a cluster of local churches, called a deanery. Your diocesan office may be able to provide you with the average levels of giving across all the churches in your deanery. Or if you are part of a team of churches you may be able to compare your giving levels to one or two sister churches. If you have this information: so you can include the average giving levels for each year as Comparator One in the yellow hued cells B47:F47.

So:

12. If you are able to get the average per Person per Week giving figures for one or two comparative churches then enter this data in the yellow hued cells B47 to F48. If it is helpful to identify the comparators then alternative text can be entered in the dark green coloured cells A47 and A48.

Creating the Dashboard document

That's all the preparation work taken care of. The next step is to create your dashboard document so that it can be used with your finance or stewardship committee or at the church council.

13. Ensure that you have *saved* the Excel workbook and while the workbook is still open, open the Word document *Dashboard.docx*. Upon opening the Word document a warning will normally appear informing you that there are linked files. To any question asking if you wish to allow these links to update, answer 'Yes'. This 'update link' confirmation will be requested each time the Word document is opened. The charts within the Word document will be automatically be updated to contain your church's data. Now save the Word document.
14. The next step is cosmetic. You can add your church logo or maybe a picture of the church or some other appropriate picture, to the text box on the title page (page 1) and save the updated Word document.
15. Now you can print off paper copies of the Word document. But better still now is the time to create a PDF copy of the document, especially if you plan to email the Dashboard to other people. The problem with the Word document is that every time someone opens it the document will ask about updating the linked files.

Creating a PDF version is very easy to do. Use the Save As command in Word, simply select PDF from the drop down options and save the PDF to wherever you like on your computer. The PDF file can easily be distributed by email, or other electronic media, independently of the Word or Excel files.

It should be noted that the document's pages are A5 in size and can be printed directly on to A4 paper in a booklet format.