

# Creating the giving data file

The Giving Data file collates anonymous giving data in a format that will easily generate, as desired, both a Giving Profile and an Age Giving Profile. This paper offers step by step guidance to entering the raw giving data, ensuring confidentiality, and creating a Giving Data file.



### A two-step process

The creation of a Giving Data file is the first step in a simple two-step process for collating your planned giving data and then generating one or both of two important and complimentary **financial analysis** tools to better understand the giving dynamics of our church:

- *A Giving Profile* which offers a rich understanding of the giving patterns in the church and is arguably the first and pressing need for many churches. <sup>i</sup>
- *An Age Giving Profile* sheds light on how giving might look tomorrow and helps us assess the critical challenge of 'ageing money'. <sup>ii</sup>

Both the Giving Profile and Age Giving Profile are completely anonymous exercises and the creation of a separate *Giving Data* file ensures confidentiality. Routinely only one or two church officers know how much individuals give. A Planned Giving Officer (PGO) may record the gifts made in weekly envelopes. Bank statements will inform the treasurer of gifts via standing order (on Direct Debits, please see below) and the Gift Aid secretary will prepare tax reclaims. Accordingly just one, perhaps two to ease the load, of these officers should complete the confidential Giving Data spreadsheet and anonymise it. Only then can the giving data be used to generate an anonymous Giving Profile or Age Giving Profile.

Once the anonymous Giving Data file is created following the guidance in this paper it is simple to generate profiles without revisiting the raw data.

### Requirements

The Excel file provided is a ".xlsx" file, the file format which was used for Excel 2007 or newer. When used with older versions of Excel, the Compatibility pack may be required; see the Microsoft website.

### Preparation

All the information you need for Columns A through D will be readily available from the church's bank statements, planned giving and Gift Aid records.

The completion of Column E, the allocation of donors to approximated age bands, is a simple task of a different type and guidance is offered below.

### Which giving records?

The faithful givers in our congregations offer their regular gifts in different ways and guidance is offered below on this. The key thing to remember is that, as far as possible, you should enter into the *confidential Giving Data* file the actual giving excluding any tax reclaimed on that giving.

First, and most simply, you will need the names of each person or household who uses a *weekly giving envelope* numbers. Simply total the amount given in each envelope in a recent twelve month period. Occasionally two people share an envelope and you must make a call on this; is it a single gift or do you want to treat it as two separate gifts? Remember, this is not an exact science; we are painting in broad brush strokes. Total *regular* cheques not in envelopes and treat as envelope offerings.

Next you need the names of those who give by *standing order* and their total gifts for the twelve month period. This information will be on the church bank statements. Denominational Direct Debit schemes <sup>iii</sup> are not a problem as the treasurer receives a report with names, the gift and tax reclaimed.

Slightly more problematic are Direct Debit gifts from charitable giving accounts from [Stewardship](#) and elsewhere. Only the donor receives a statement of the gift and tax paid while under payroll giving the gift arrives inclusive of tax and additionally, at least in theory, the *number* of givers may not be known.

In practice gifts from charitable accounts and payroll pose few problems. They are usually few in number, local knowledge often provides the answer and at worst the inclusive gift can often be absorbed without distorting the overall picture. Occasionally you may judge that some gifts or one or two very large gifts make a material difference and should be excluded.

### Creating the giving data sheet

1. Download the Excel spreadsheet *giving\_data\_confidential* from the Giving Profile [tab](#) and save it to your hard disk.
2. Enter text to identify the twelve month period being used into green cell C4.
3. Starting at Row 9 in Column A (*Name*), type the name of the planned giver. All the data for that person will be recorded on the same row. Note that we will remove these names later to ensure confidentiality. Enter names in any order; the file does not need to be sorted alphabetically or by gift amount. Just ensure that the information in each row relates to just one giver.
4. In the light blue cells in Column B (*Annual Total*), record the total amount of that person's giving over a recent twelve month period. As above, ensure that you include all types of giving envelopes, SO, DD, payroll etc.
5. In the light blue cells in Column C (*Gift Aid?*), enter a 'Y' if the person/giver has a valid Gift Aid

declaration. Enter an 'N' if they do not. This is optional and you may not use this data but it is so much easier to include it now than to come back and look for it if you want it at a later date.

6. In the light blue cells in Column D (*Giving Method*), enter an 'E' if the person gives by Envelope or regular giving by cheque. Enter 'B' (for 'Bank') if the person gives by standing order, direct debit, charitable account or payroll giving. Again this column is optional. You can create Profiles without this data but they will be less rich.

### Assigning age bands to column E

7. The yellow cells in Column E (*Age Band*) contain the age band data and without this you cannot create an Age Giving Profile. You can add this data in at a later date without needing to revisit all your giving data. At the top of the giving data file highlighted in light yellow are some very broad age bands: A is young adults aged 18-29, B those aged 30-49 and so on. Completion of Column E is not an exact science; don't ask for birthdays. Simply use local knowledge to assign each giver to an age band. Make a guess. One or two will be wrong but no matter; we want a broad picture.

### Nearly there!

You have the information you need and in a helpful format. Now this *Confidential Giving Data* spreadsheet should be retained by the person who created it. No one else needs to, no one else should see it. The last few steps will preserve confidentiality and create an anonymous data set to generate a Giving Profile and/or an Age Giving Profile:

8. Make a copy of the *confidential\_giving\_data* spreadsheet, giving it the different name, *Giving\_Data*, and save it to your hard disk
9. Delete Column A; right click on the column header A and select: delete. The donor names are gone and Column A is now *Annual Total*.
10. Save the new anonymised file *Giving Data* to complete your Profiles when you are ready.

### Creating your profiles

Click to the Giving Profile tab or the Age Giving Profile tab for background papers, Excel templates and guidance on creating and understanding the Profiles.

#### Notes and Resources

- <sup>i</sup> For more information click to the Giving Profile tab under [Financial Analysis](#)
- <sup>ii</sup> For more on the value of an Age Giving Profile and guidance on creating one click to the Age Giving Profile tab under [Financial Analysis](#).
- <sup>iii</sup> The [Parish Giving Scheme](#) is currently for Church of England dioceses; [Gift Direct](#) for the Church in Wales.