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Donor Insights: Leveraging the Giving Unit Summary

→ What is it?

→ Why did we make it?

→ Use Cases

→ Questions?

Halpert | 4370
Giving Unit Summary #4370

Household ID:	4370
Household Name *:	Halpert
Primary Individuals:	Jim & Pam
Giving Unit Type *:	Household

Giving Info

Giving Notes *:	Batched donations are included for all statement headers unless configuration settings are edited
Giving YTD *:	$210.00
Giving YTD Last Year *:	$1.00
Giving Variance Last YTD:	$209.00
Giving Last Year *:	$4.00

Online Giving Info

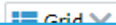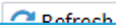|	
Online Giving Notes *:	Set Is_Online=True for all online payment types
Online Giving YTD *:	$0.00
Online Giving YTD Last Year *:	$1.00
Online Giving Variance Last YTD:	($1.00)
Online Giving Last Year *:	$4.00

Gift Info

...

Gifts (Donation Distributions)	Contacts

Grid ⌄   Refresh

Giving Unit Summary

Overview:
- ➔ A Read Only Page.
- ➔ It can be layered with Views
- ➔ Enables you to target your donors for communication.
- ➔ Sheds light on giving at a Household level.

Users can:
- ➔ See Household giving variances
- ➔ See Household giving specifically for online gifts.
- ➔ See all Donations associated with the Household.
- ➔ Run reports

*Have patience with the page - it is compiling a LOT of data from various areas of the Platform. It will be slow.

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What is it?

Why did we make it?

Use Cases

Questions?

Targeted Communication with Donors

| Goal | Target | Communicate! |

What you are wanting to communicate?

Identify your target Donors

Email

Text

Letter or Postcard

Phone Calls

What is it?

Why did we make it?

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➡️ **Giving Online**

Who has not transitioned to making online donations?

➡️ **First Time Donors**

Who gave for the first time?

➡️ **Donor Variances**

Are there Donors whose giving has decreased significantly?

➡️ **Lapsed Donors**

Who stopped giving during Covid-19 and has not started again?

Giving Online

Identify who is giving but not online

You can now target your communication to these givers:

➢ Email instructions & links for donating online
➢ No email? Send a mailer or postcard!
➢ Use Planned Contacts or the Selected Call List report to connect with them via a phone call

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| Export | Secure | Tools ⌄ | Reports ⌄ | Grid ⌄ | Print | Refresh |

| | | in View | Gave This Year, Not Online ⌄ | | Notify |

		Household Name	Primary Individuals	Participant Type	Giving YTD	Giving YTD Last Year
☐	●	Aardvark	George & Aardwina	Attendee	$43.00	$3.00
☐	●	Briggs	Daniel	Attendee	$31.00	$0.00
☐	●	Buck	Paul & Donna	Attendee	$20.00	$0.00
☐	●	Bush	Daniel & Sandra	Attendee	$11.00	$0.00
☐	●	Campbell	Daniel & Sandra	Attendee	$12.00	$0.00
☐	●	Carver	Paul & Donna	Attendee	$67.00	$0.00
☐	●	Cucumber	Larry	Attendee	$23.00	$0.00
☐	●	Doe	John	Guest	$5.00	$0.00
☐	●	Duck	Donald		$2.50	$0.00
☐	●	Farmer	Daniel	Attendee	$12.00	$0.00
☐	●	Gaines	Paul & Donna	Attendee	$89.00	$0.00
☐	●	Glass	Paul & Donna	Attendee	$312.00	$0.00
☐	●	Halpert	Jim & Pam	Attendee	$105.00	$1.00
☐	●	Hamilton	Daniel & Sandra	Attendee	$320.00	$0.00
☐	●	Jarvis	Paul & Donna	Attendee	$450.00	$0.00
☐	●	Joyce	Daniel & Sandra	Attendee	$21.00	$0.00
☐	●	Manly	Frank & Lady	Member	$35.00	$0.00
☐	●	Mouse	Minnie		$12.00	$0.00
☐	●	Noble	Daniel & Sandra	Attendee	$19.00	$0.00
☐	●	Rogers	Sandra	Attendee	$32.00	$0.00
☐	●	Rogers	Steve	Attendee	$200.00	$0.00
☐	●	Sampson	Daniel & Sandra	Attendee	$500.00	$0.00
☐	●	Schrute	Dwight		$3,001.00	$0.00
☐	●	Testor	Jim		$34.00	$0.00
☐	●	Tomato	Bob	Guest	$543.00	$0.00
☐	●	Wayne	Bruce		$123.00	$0.00

First Time Donors

➢ First EVER Household Donation (use the First_HH_Donation field)

First Time Donors

➢ First Donation in a year (Giving_Last_Year = 0 and Giving_YTD > 0)

First Time Donors

➢ First Donation given online

First Time Donors

Send a targeted message thanking them!

Let them know how their gifts are being used and what the church is accomplishing!

Donor Variance

Are there donors whose giving has increased? ⬆

		Household Name	Primary Individuals	*Giving YTD* ▼	Giving YTD Last Year	Giving Variance Last YTD
☐	🟢	Halpert	Pam & Jim	$3,051.00	$7.00	$3,044.00
☐	🟢	Schrute	Dwight	$3,001.00	$0.00	$3,001.00
☐	🟢	Tomato	Bob	$1,086.00	$0.00	$1,086.00

Search field · in View · This YTD Vs Last YTD: Up or Sam ▼ · Notify

Are there donors whose giving has decreased? ⬇

		Household Name	*Primary Individuals* ▼	Giving YTD	Giving YTD Last Year	Giving Variance Last YTD
☐	🟢	Vance	Phyllis	$0.00	$8.00	($8.00)
☐	🟢	Adams	Paul	$0.00	$10.00	($10.00)
☐	🟢	Smith	Jane & John	$0.00	$146.00	($146.00)

Search field · in View · This YTD Vs Last YTD: Down ▼ · Notify

Lapsed Donors

Whose giving stopped during Covid shutdown, and has not started again?

Giving After Variance < 0
Giving Last Year > 0

Reach out! Turn those zeros into a ministry!

Household Na...	Primary Individuals	Giving Before	Giving After	Giving After Variance	Gifts Before	Gifts After	Gifts After Vari...	Giving Last Year
***Default	Contact	$3,138.50	$0.00	($3,138.50)	62	11	-51	$15,538.00
***Unassigned	Contact	$100.00	$0.00	($100.00)	2	0	-2	$250.00
Aardvark	George & Aardwina	$2.00	$0.00	($2.00)	2	0	-2	$430.00
Generous	George & Gina	$2.50	$0.00	($2.50)	1	0	-1	$2.50
Halpert	Jim & Pam	$2.00	$0.00	($2.00)	2	0	-2	$4.00
Haremski	Heather & Google Email	$40.00	$0.00	($40.00)	2	0	-2	$286.00
Mouse	Nickname	$1.00	$0.00	($1.00)	1	0	-1	$1.00
Rogers	Sandra	$1.00	$0.00	($1.00)	1	0	-1	$1.00
Vance	Phyllis	$1.00	$0.00	($1.00)	1	0	-1	$9.00

Donors who have returned to giving!

	Household Na...	Primary Individuals	Giving Before	Giving After	Giving After Variance
🟢	Aardvark	George & Aardwina	$2.00	$43.00	$41.00
🟢	Briggs	Daniel	$0.00	$31.00	$31.00
🟢	Buck	Paul & Donna	$0.00	$20.00	$20.00
🟢	Bush	Daniel & Sandra	$0.00	$11.00	$11.00
🟢	Campbell	Daniel & Sandra	$0.00	$12.00	$12.00
🟢	Carver	Paul & Donna	$0.00	$67.00	$67.00
🟢	Cucumber	Larry	$0.00	$23.00	$23.00
🟢	Doe	John	$0.00	$5.00	$5.00
🟢	Duck	Donald	$0.00	$2.50	$2.50
🟢	Eames	Angie & Dan	$120.50	$3,051.00	$2,930.50
🟢	Farmer	Daniel	$0.00	$12.00	$12.00
🟢	Gaines	Paul & Donna	$0.00	$89.00	$89.00
🟢	Glass	Paul & Donna	$0.00	$312.00	$312.00
🟢	Halpert	Jim & Pam	$2.00	$105.00	$103.00
🟢	Hamilton	Daniel & Sandra	$0.00	$320.00	$320.00
🟢	Jarvis	Paul & Donna	$0.00	$450.00	$450.00
🟢	Joyce	Daniel & Sandra	$0.00	$21.00	$21.00
🟢	Kelly	Gene	$0.00	$5.00	$5.00
🟢	Manly	Frank & Lady	$0.00	$35.00	$35.00
🟢	McCord	Kevin & Kevin	$0.00	$3.00	$3.00
🟢	Morris	Don & Laura	$0.00	$10.00	$10.00
🟢	Mouse	Minnie	$0.00	$12.00	$12.00
🟢	Noble	Daniel & Sandra	$0.00	$19.00	$19.00
🟢	Reynolds	Burt	$0.00	$2.00	$2.00
🟢	Rogers	Steve	$0.00	$200.00	$200.00
🟢	Rogers	Sandra	$1.00	$32.00	$31.00
🟢	Sampson	Daniel & Sandra	$0.00	$500.00	$500.00
🟢	Schrute	Dwight	$0.00	$3,001.00	$3,001.00
🟢	Testor	Jim	$0.00	$34.00	$34.00

Configuration Settings

Comparison Date: Compare how giving changed before and after this date.

Comparison Months: The number in months to compare before and after the Comparison Date parameter.
(Note: The comparison period must be fully contained within this year and last.)
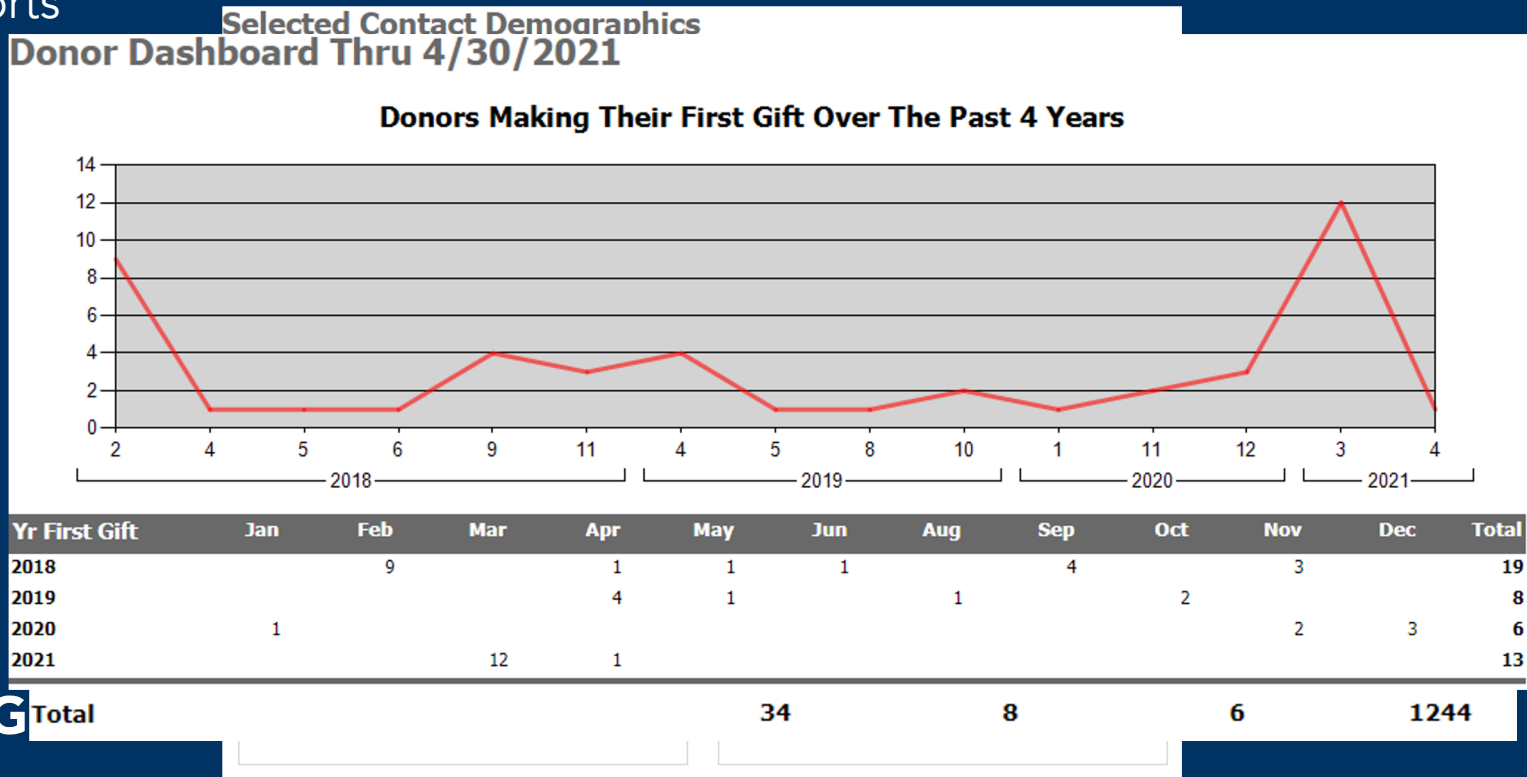
Comparison Date: 01/01/2021
Comparison Months: 4

Before Period: 9/1/2020 - 12/31/2020
After Period: 1/1/2021 - 4/30/2021

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Bonus Uses:

➢ Export to Excel for further manipulation of the data
➢ Reports

Selected Contact Demographics

Donor Dashboard Thru 4/30/2021

Donors Making Their First Gift Over The Past 4 Years

Yr First Gift	Jan	Feb	Mar	Apr	May	Jun	Aug	Sep	Oct	Nov	Dec	Total
2018		9		1	1	1		4		3		19
2019			4		1		1		2			8
2020	1									2	3	6
2021			12	1								13
Total					**34**		**8**		**6**		**1244**	

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THANK YOU!