

## Donor Analysis for Annual Giving Report

The analysis of donors below breaks down how many donors gave within a date range, within a specific donation amount. We're trying to analyze how many families gave between \$.01 to \$300, \$300.01 to \$750, etc. We're then trying to see which of these are parishioners and which are not.

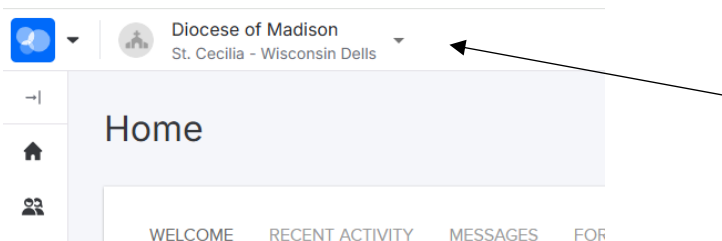
*Please Note: When pulling reports in ChMS you must make sure that for the date range you're reporting on the following has happened: 1) In the Giving tool all Batches associated with the report date must have a status of Deposited (ie: batches for checks/cash) 2) In the ChMS tool, verify by going to Giving < Online Gifts, then click Next Step and verify that all transactions associated with the date have been selected and batched.*

Here's an example of the types of information the steps below will give you:

	FY 23.24		
	Donors	Total Donations	
\$1-\$300			
\$301-\$750			
\$751-\$2,500			
\$2,501-\$5,000			
\$5,001 & above			
Non- Registered			

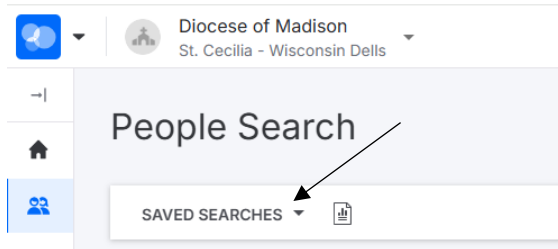
We're looking for data for a specific parish and the date range of the past fiscal year and THEN 1) Counting how many Registered Families are donating within that donation range and totaling all donations for that donation range. And 2) we're counting all donors that are NOT Registered/Active for the number of families and their total donation amount.

- 1) Go in on the ChMS and verify that the campus you're reporting on is shown in the upper left corner selector. In the screen shot below, we'd be reporting on St Cecilia-Wisconsin Dells.



- 2) Make sure you have a Saved report of both your Registered families by Campus and your Not Registered families by Campus within your **Saved Search** area and know what the names are called so you know who they are pulling. In the example below,

I went to the **People Search < Saved Searches** and verified that I had a report called “Registered Fam \_\_\_\_” and “Not Registered Fam\_\_\_\_” for the campus I was reporting on. I also verified that my Not Registered families report included those deceased, inactive, etc as I want to pull a report for all folks, even if they passed away or are not active members of the parish. See footnote at



- 3) Go to **Reports & Metrics < System Reports < Financial** and then select: **Giving Statement Summary** We verified our searches in step 2) as we'll use those to layering and restrict the report to JUST the Registered families first and then those not Registered families that gave. The **Family Giving Statement Summary** gives us a summary by family, of their total donations in that date range.
- 4) Opening up the report to run, specify Families for the report and select the date range you wish to report on, either a custom or a quick date range.

A screenshot of a web application form titled "Giving Statement Summary" with a close button (X) in the top right corner. Below the title is a note: "You can print giving statements for families or individuals." There is a dropdown menu with "Family" selected. Below that is a checkbox labeled "Display children and others in their own rows". The "Date Range" section has a text instruction: "Select a 'Quick Date Range' from the pulldown or click into the input fields to easily enter the start and end dates." There are two radio buttons: "Quick Date Range..." (unselected) and "Custom Date Range" (selected). Below the radio buttons are two input fields: the first contains "07/01/2023" and the second contains "06/30/2024", separated by a hyphen.

- 5) Next, under the **\*Optional\*** area, as seen below, select your saved Registration report and then verify that your campus selected also matches for the report you're pulling. In this example, we're pulling Registered parishioners at St Cecilia:

**Giving Statement Summary**

**\*OPTIONAL\* Only Use These People**

You can optionally use a saved advanced search to return a specific subset of people. For instance, you might want to include only those people who are part of a saved advanced search called "Church Members".

Registered Fam-St Cecilia Wis Dells

**Campus**

This report can include information from multiple campuses.

☒ St. Cecilia - Wisconsin Dells

☐ Change campus selection...

- 6) Under the Output area, select Excel which will send it to an excel document, similar to below where we can see a summary of the families information along with a total of what they've given in that date range. We'll focus on the **Totals** lines below for pulling the rest of the data for this report.

Family Giving Statement Summary																					
From 'Monday, January 1, 2024' to 'Tuesday, December 31, 2024'																					
This report includes transactions given by people from the																					
Family (ID	Full Name	First Name	Family/Hc	Street	City	State	Postal	Coc	Country	Carrier	Ro	Mobile	Pf	Home	Phc	Work	Pho	Email	Deductibl	Non-Dedu	Total
The Anch																			\$2,230.00	-	\$2,230.00
The Anch						MI			United States										\$750.00	-	\$750.00
The Andel	A																		\$1,175.00	\$200.00	\$1,375.00
The Andel																			\$1,270.00	-	\$1,270.00
The Anen																			\$395.00	-	\$395.00

- 7) With the Excel document open, delete out the additional lines so you only see the bolded fields across the top as the main "header". If you wish, also save this document if you wish to reference it again:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R				
1	Family (ID	Full Name	First Name	Family/Hc	Street	City	State	Postal	Coc	Country	Carrier	Ro	Mobile	Pf	Home	Phc	Work	Pho	Email	Deductibl	Non-Dedu	Total
2	The Ar																			\$2,870.00	-	\$2,870.00
3	The Anch																			\$1,500.00	-	\$1,500.00
4	The Ande																			\$1,650.00	-	\$1,650.00

- 8) Next, do a Sort by going to the Sort & Filter area, and sort by the **Totals** column. It will default to sorting from smallest to largest. Next, highlight the smallest number to the "break" point of your reporting. Ex: If I'm reporting on smallest gift to \$300, I'm highlighting all the way up to \$300.

N	O	P	Q	R	S
	\$250.00	-	\$250.00		
badgers60	\$255.00	-	\$255.00		
mbavlnka	\$260.00	-	\$260.00		
watsonkm	\$270.00	-	\$270.00		
bkmetz20	\$280.00	-	\$280.00		
lakeside@	\$290.00	-	\$290.00		
richjowisc	\$300.00	-	\$300.00		
	\$300.00	-	\$300.00		
standzierz	\$300.00	-	\$300.00		
tahickey8	\$300.00	-	\$300.00		
rrred)	\$300.00	-	\$300.00		
pablank@	\$302.00	-	\$302.00		
stellapioti	\$310.00	-	\$310.00		
rrred)	\$312.00	-	\$312.00		

\$135.11   **Count: 80**   **Sum: \$10,809.00**   Display Settings  

- 9) Write down the amount for the **Count** and the **Total**, as seen above. My breakdown for the \$0 to \$300 is 80 families and the total given is: \$10,809
- 10) Continue for the rest of the families getting your counts until you've completed your analysis on the **Registered** families that have given.
- 11) Lastly, go back in to report off of your Not Registered families by running the same report and layering the Not Registered families into the report. Go to **Reports & Metrics < System Reports < Financial** and then select: **Giving Statement Summary**

Giving Statement Summary

You can optionally use a saved advanced search to return a specific subset of people. For instance, you might want to include only those people who are part of a saved advanced search called "Church Members".

Not Registered Fam-St Cecilia Wis Dells

Campus

This report can include information from multiple campuses.

☒ St. Cecilia - Wisconsin Dells

☐ Change campus selection...

*Note about saving a search for those that are NOT Registered and Active:*

Please create a Search in your system using the additional filtering criteria. The system does simply allow you to do a “NOT” of a current report, but it requires two “sets” to be present. In our example of where we’re trying to find those members that are not Registered/Active at a parish, the Filtering area will be similar to what is seen below:

The screenshot displays a search filter configuration interface. At the top, it says "Apply filters below:" with a "CLEAR FILTERS" link on the right. Below this is a formula bar containing a red "Not" button, a grey "Set 1" button, a red closing parenthesis ")", a green "And" button with a dropdown arrow, and a grey "Set 2" button. An arrow points to the "Not" button. To the right of the formula bar is a link "? Set Formula Tips".

**Set 1**

Set 1 contains a "Match All" button with a dropdown arrow. Below it is a vertical green line with two dots. To the right of the line are two filter rows:

- Row 1: "Membership Type" dropdown, "Is" dropdown, "Registered" dropdown.
- Row 2: "Profile Type" dropdown, "Is" dropdown, "Active" dropdown.

Below these rows is a "+ FILTER" button.

**Set 2**

Set 2 contains one filter row:

- Row 1: "Campus" dropdown, "Is" dropdown, "St. Cecilia - Wiscon..." dropdown.