# Best Practices in Stewardship and Financial Reporting

The vendor session that's not about a vendor

### About Me

- I'm a husband and grandfather
- COO at Simple Donation
- Former CFO of Camp Eagle, Black Diamond and Glorieta Camps
- Former missionary to India



### Big Brotherish?

## 

Hi Jimmy,

How's it going? How's life? I'd love to catch up with you sometime.

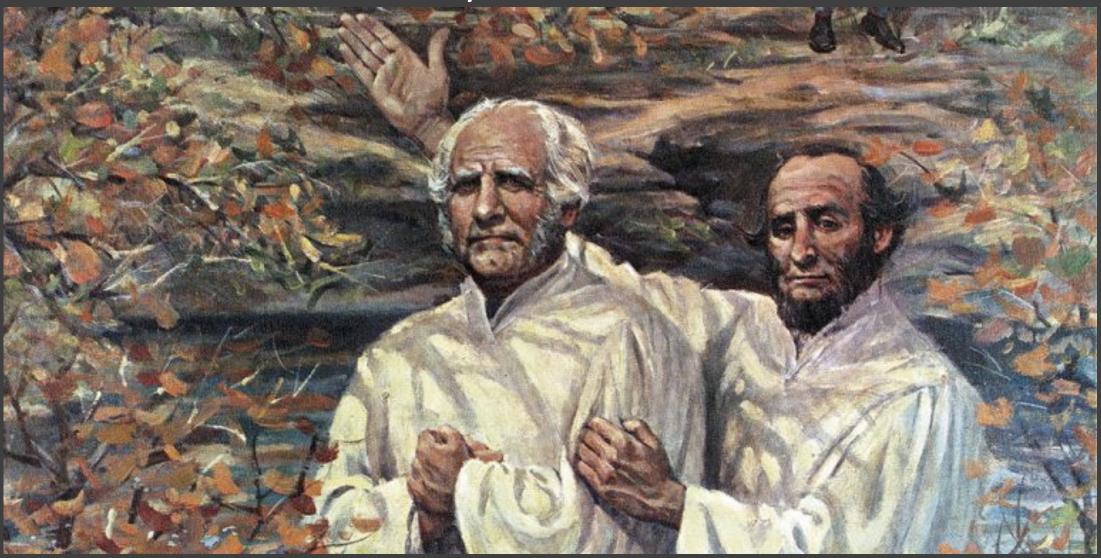
Would you like to do that? If so, what works best for you - grabbing breakfast one morning or a phone call?

Contact Info:

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### How we use money reveals our heart



"People not giving comes down to a financial problem, a church problem, a God problem or a technical problem" – Scott Mozingo, Grace Church

#### We're called to make disciples

- Galatians 6:1 restoring those caught in sin
- Teaching to obey all that God commands
- Equipping saints to be fruitful
- Mark 4:19 cares of the world, deceitfulness of riches and desires for things choke out the Word

- Increase awareness
- The meaning may not be obvious
- Should cause you to drill down



The Value of Signals

We need to address envy, greed and covetousness.

We need to help people battle the temptations of the flesh and live according to the Spirit.

### Sample Signals In Rock

- First Time Givers (via dataview and report or via SQL)
- New Consistent Givers
- New Recurring Givers
- Increases in Giving
- Unusually Large Gifts

### Ways to get this information

- Dataviews
- Dynamic Data Blocks (SQL is outside the castle walls, but my go to)
- Giving Alerts

#### How to act on positive alerts

- Celebrate
- Thank/Affirm
- Build relationship
- Emails, printed letters, phone calls

#### More Signals in Rock

- Givers not members
- Members not Giving
- Giving by Tags
- Lapsed Givers
- Cancelled Recurring Gifts
- Late Gift

#### How to act on other alerts

- Confirm the data
- In the context of relationship (never let giving be the first or second touch)
- Generic check-in
- Mention noticing the change and see how they respond
- Track your touches
  - Notes (can make a financial category)
  - Financial touches as a step
  - Badges around stewardship

#### Consider Measurement around Stewardship

- % of regular attenders who don't give
- % of regular attenders who give
- % of ERA that gives
- Unique giving units per month
- Unique giving units per 12 months

- Median gift amount
- Total Giving
- General Fund Giving
- # of recurring givers
- # of consistent givers (monthly for last 3 months)

### Think about the impact we can have

### Acknowledgements

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Lorin Harris Brookside Community Church



#### Takeaway

https://simpledonation.com/rx-2022-takeaway



#### Further Resources

#### Christian Stewardship Network www.christianstewardshipnetwork.com

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