

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?

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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

The Value of Signals

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



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

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THECOMPASSCHURCH

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Takeaway

<https://simplifiedonation.com/rx-2022-takeaway>



Further Resources

Christian Stewardship Network
www.christianstewardshipnetwork.com

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