



The
153 Effect



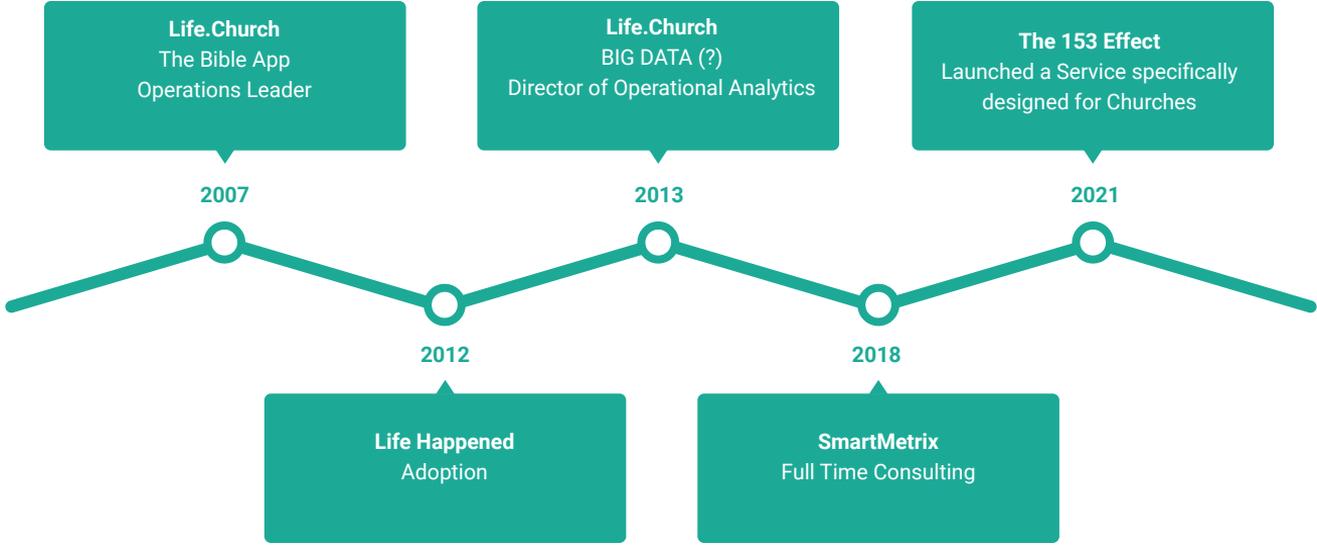
SmartMetrix

Making the Most of Your Data and Systems: Rock and Tableau Integration

Presented by: Amber Smart



My Journey



My Intention Today

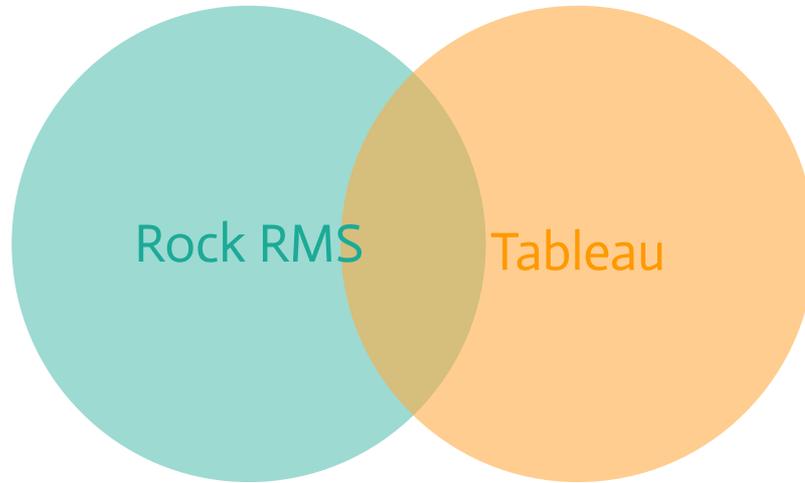
Church management and data systems are great, if you know how to use them well and align with your church's mission.

But how do you know if you are getting the most out of your tools?

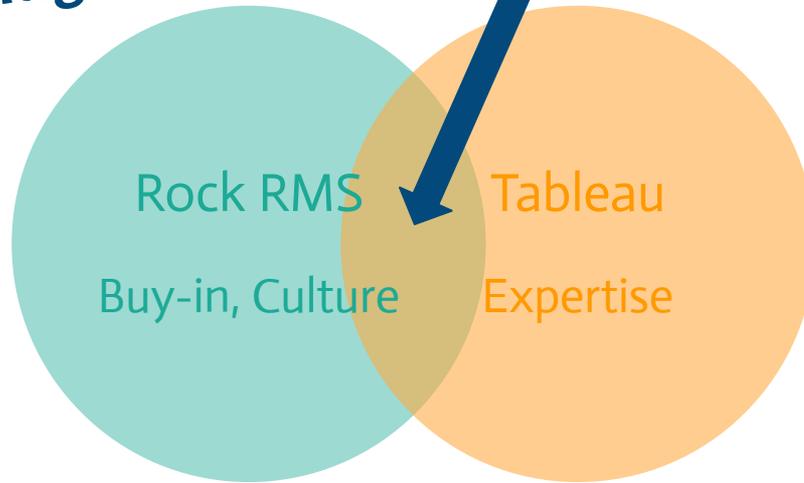
Could you use them differently to fuel your church and mission?

My intention today is to facilitate curiosity.





Where the magic happens!



Data Fluency — What Is It?

Like being fluent in a language, data fluency enables people to express ideas about data in a shared language. In a business context, data fluency **connects ministry leaders across roles** through a set of standards, processes, tools and terms.





Data Fluency — What Is It?

Data fluent ministry leaders can turn piles of raw data into **actionable information** because they understand how to interpret it, know the data that is and isn't available, as well as how to use it appropriately.

Data Fluency — What Is It?

Data fluency rejects the idea that only a select few are gatekeepers of information, instead spreading knowledge, widening data access across an organization, and as a result, **improving decision-making for everyone.**



Data Fluency — What Is It?

- Enables people to **express ideas** about data in a shared language
- **Connects ministry leaders** across roles with a set of standards, processes, tools & terms
- Interpret piles of raw data into **actionable information**
- **Identify** what data is and isn't available data
- Understand how to use **BOTH data AND discernment** for informed decision making





Why Data Fluency Matters

The church's desire to be more data-aware is increasing, but only a select few churches are reaching their goals. **Cultivating a data-fluent ministry culture is the answer.**

Data fluency drives decision-making. When a church culture promotes the accessibility, interpretation and relevancy of their data, **ministry leaders make confident decisions, and faster.**

Why Data Fluency Matters

The **power of knowledge discovery motivates ministry leaders** to ask more questions, knowing the answer is only moments away.

When ministry teams and departments across a church are on the same page with data, it's easier to define KPIs and track past success. This part often turns into a debate stemming from disparate data, but with data fluency, there's a **single version of the truth to work off.**





Why Data Fluency Matters

Finally, data fluency **promotes curiosity** within the organization. When ministry leaders are learning new things, they're usually more engaged in their roles, leading to smarter questions, better data analysis and **higher overall ministry effectiveness rates**.

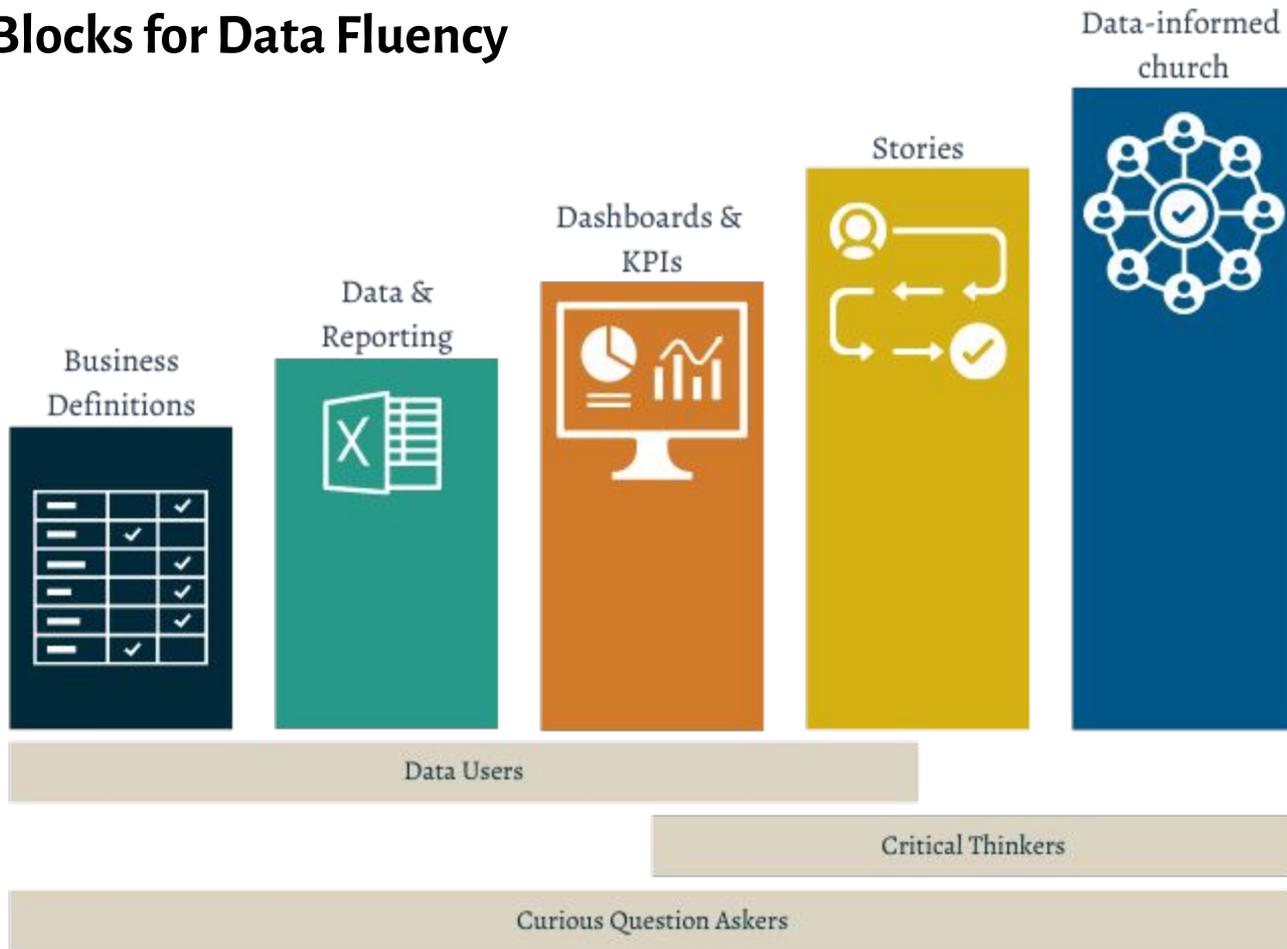
Your church won't become data literate overnight, but with tools like Rock & Tableau, data fluency is a short-term inevitability.

Why Data Fluency Matters

- A data-fluent culture allows churches to be more **aware of opportunities**
- Data fluency drives **efficient and confident decision-making** through accessibility, interpretation and relevancy of data
- Ministry leaders are **motivated to ask questions**, knowing answers are **moments away**
- Easier to define KPIs and **track successes**
- **Single version of data truth to work off**



Building Blocks for Data Fluency



Data-Informed > Data-Driven

BOTH

Data

AND

Discernment

Facilitating Curiosity

- What would you like to know about how your attendees or members give?
- Do different generations give differently?
- How do you identify “at-risk” givers?
- How do you identify momentum?
- What % of your giving households give what % of your total giving? (Are you protected?)

How to Connect Data in Rock to Tableau



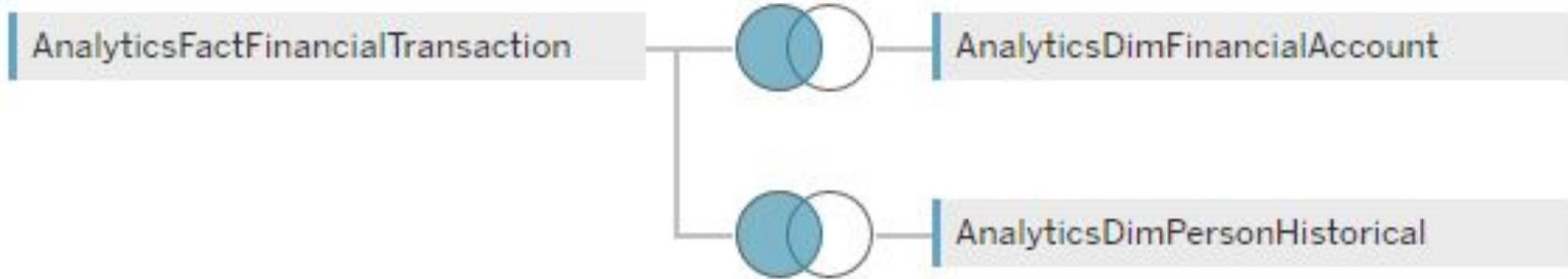
Info you will need to connect to your Rock instance:

- Type of Server (ex: MySQL, Azure Synapse Analytics, Microsoft SQL Server, etc.)
- Server Address
- Database Name
- Username
- Password

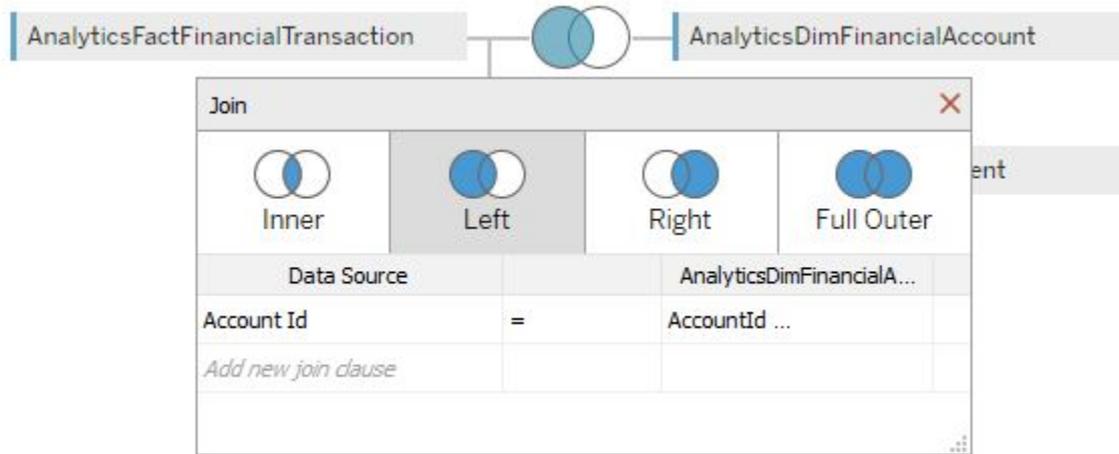
Friendly Tables to Start With

- Any tables that start with “Analytics”
- Rock Metrics = “AnalyticsFact*MetricName*”

Today's Query:



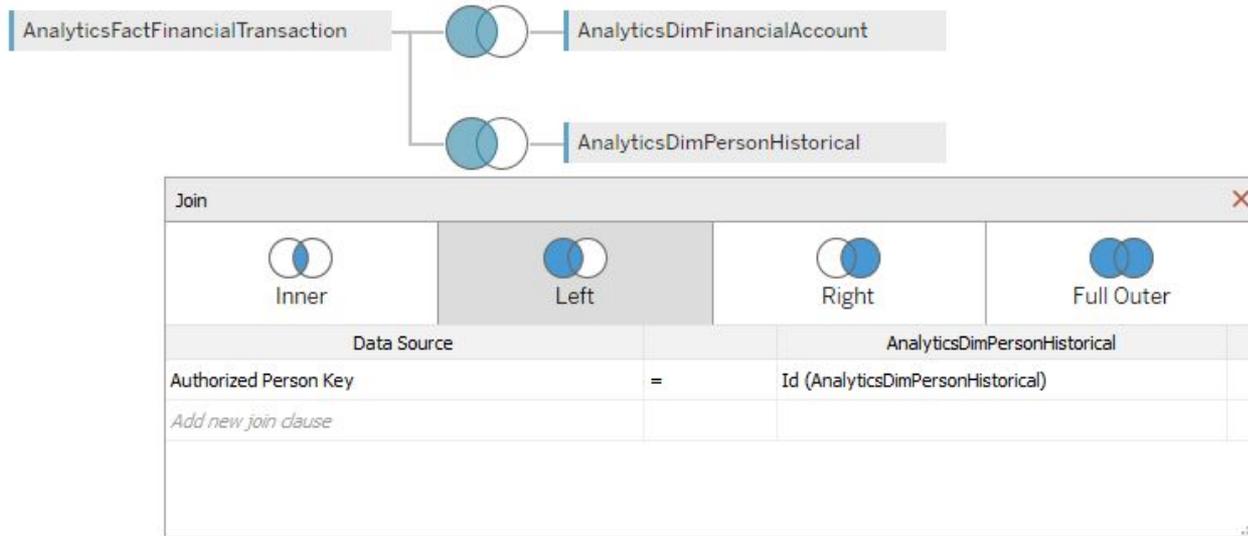
Today's Query:



This gives us the ability to filter out the gift to Tithe only.

How you classify this differently than designated giving will be specific to you.

Today's Query:



This gives us the ability to identify the birth year of our givers so we can then bucket them into generations.

Real World Example

What's Possible?

Spoiler Alert - Anything!



Campus Name

(All)

Transaction Date Time

Last 3 years

Unknown



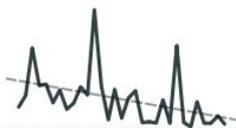
Gen Z [1997-2012]



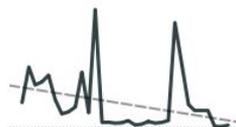
Millennials [1981-1996]



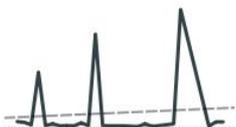
Gen X [1965-1980]



Boomers II [1955-1964]



Boomers I [1946-1954]



Post War [1928-1945]



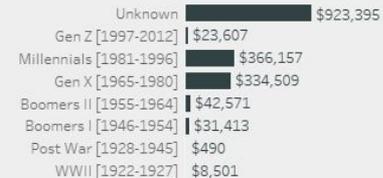
WWII [1922-1927]



Generation's Preferred Method of Giving

Generation	ACH	Cash	Check	Credit Card	Non-Cash Asset	Other
Unknown	449	2,201	3,524	2,603		15
Gen Z [1997-2012]	112	198	188	187		21
Millennials [1981-1996]	1,509	1,710	1,433	6,472		113
Gen X [1965-1980]	884	2,088	2,198	4,137	14	27
Boomers II [1955-1964]	196	1,005	1,578	657	3	31
Boomers I [1946-1954]	30	423	1,027	223		
Post War [1928-1945]		531	211	26		
WWII [1922-1927]		42	67	8		

Amount Given by Generation

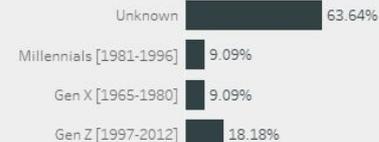


Number Gifts Given by Generation



% of All New Givers

(Given for the 1st time in last 6 months)



What does giving by generation look like?

At Risk/Lapsed Giving Households

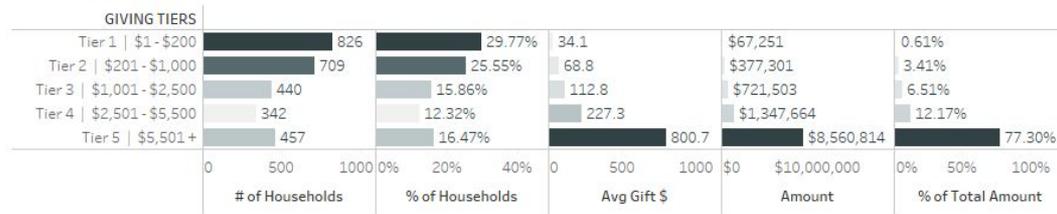
Define Risk	AVG DAYS B/T GIFTS	DAYS SINCE LAST GIFT					
		1: 0-30	2: 31-60	3: 61-90	4: 91-120	5: 121-180	6: 181+
At Risk	1: 0-30		94	52	43	59	1,933
	2: 31-60			45	29	34	1,089
	3: 61-90				7	19	421
	4: 91-120					15	243
	5: 120+					43	957
	One Time Giver	83	47	40	46	68	3,665
Not At Risk	1: 0-30	727					
	2: 31-60	363	78				
	3: 61-90	64	23	17			
	4: 91-120	31	10	14	5		
	5: 120+	139	27	32	32		

Click on Name below to go to Rock Profile

Giving Id	Date
G150	November 2, 2014
G158	October 28, 2021
G742	July 30, 2022
G743	April 8, 2019
G744	August 1, 2022
G745	May 10, 2019
G747	September 29, 2017
G750	November 5, 2018
G752	November 28, 2018
G753	November 29, 2020
G754	August 14, 2022
G755	May 8, 2018
G756	July 12, 2018
G757	February 9, 2018
G759	June 3, 2018
G760	February 21, 2021
G762	December 14, 2018
G769	February 1, 2021
G804	December 5, 2019
G808	December 2, 2015
G809	September 8, 2019
G813	April 21, 2022
G823	May 7, 2020
G827	November 22, 2020
G840	January 5, 2020
G845	April 19, 2020
G851	July 26, 2020
G852	August 5, 2022
G853	December 14, 2019
G854	November 17, 2019

How do you identify “at-risk” givers?

Giving Tiers

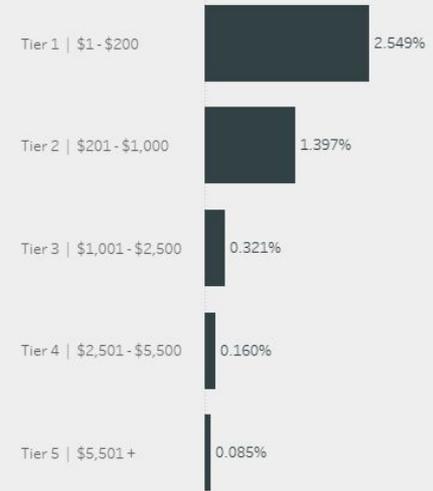


Giving Tier Momentum



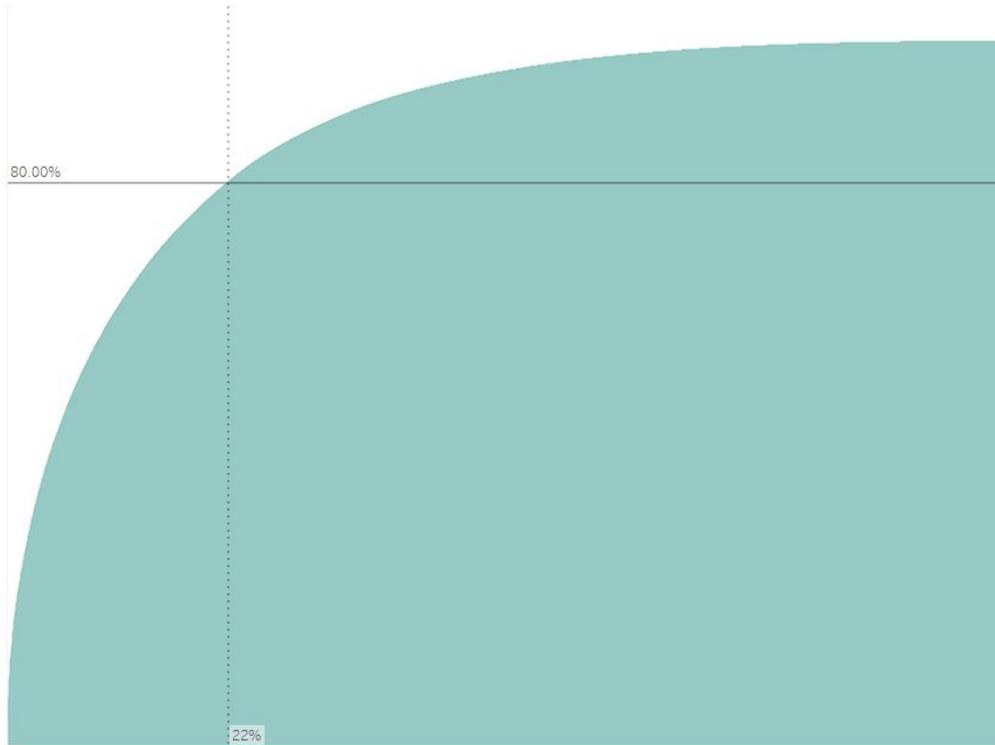
Year
2021

% of New Givers by Tier Last 6 Months



How do you identify momentum?

503 (22%) families account for 80% of the amount received.



Transaction Date Time

This year

What % of your giving households give what % of your total giving?

Let's Build It!



Calculations Used



Generation Calculation

Generation

```
IF [Birth Year]>= 1997 and [Birth Year] <= 2012 then 'Gen Z [1997-2012]'  
  
elseif [Birth Year]>= 1981 and [Birth Year] <= 1996 then 'Millennials [1981-1996]'  
  
elseif [Birth Year]>= 1965 and [Birth Year] <= 1980 then 'Gen X [1965-1980]'  
  
elseif [Birth Year]>= 1955 and [Birth Year] <= 1964 then 'Boomers II [1955-1964]'  
  
elseif [Birth Year]>= 1946 and [Birth Year] <= 1954 then 'Boomers I [1946-1954]'  
  
elseif [Birth Year]>= 1928 and [Birth Year] <= 1945 then 'Post War [1928-1945]'  
  
elseif [Birth Year]<= 1927 then 'WWII [1922-1927]'  
  
END
```

Giving Tiers Calculation (Step 1)

Giving Tiers

```
(IF sum([Amount]) >=0 and SUM([Amount])<= 200 then 'Tier 1 | $1 - $200'  
elseif sum([Amount]) >200 and sum([Amount]) <=1000 then 'Tier 2 | $201 - $1,000'  
elseif sum([Amount]) >1000 and sum([Amount]) <= 2500 then 'Tier 3 | $1,001 - $2,500'  
elseif sum([Amount]) >2500 and sum([Amount]) <= 5500 then 'Tier 4 | $2,501 - $5,500'  
  
elseif sum([Amount])>5500 then 'Tier 5 | $5,501 +'  
END)|
```

Giving Tiers Calculation (Step 2)

GIVING TIERS

```
{FIXED [Giving Id], DATEPART('year', [Transaction Date Time]) : [Giving Tiers]}
```

At Risk Givers - Avg Days Between Gifts (Step 1 & 2)

Family Giving MIN Date

```
DATE({FIXED [Giving Id]: MIN([Transaction Date Time])})
```

Family Giving MAX Date

```
DATE({FIXED [Giving Id]: MAX([Transaction Date Time])})
```



At Risk Givers - Avg Days Between Gifts (Step 3 & 4)

Family Number of Gifts

```
{FIXED [Giving Id] : COUNT([Amount])}
```

'g Number of Days between gifts

```
(max([Family Giving MAX Date]) - min([Family Giving MIN Date])) / (sum([Family Number of Gifts]) - 1)
```

At Risk Givers - Days Since Last Gift (Step 1 & 2)

Days Since Last Gift

```
DATEDIFF('day',[Family Giving MAX Date], TODAY())|
```

DAYS SINCE LAST GIFT

```
IF [Days Since Last Gift] <=30 then '1: 0-30'  
ELSEIF [Days Since Last Gift] >30 and [Days Since Last Gift] <=60 then '2: 31-60'  
ELSEIF [Days Since Last Gift] >60 and [Days Since Last Gift] <=90 then '3: 61-90'  
ELSEIF [Days Since Last Gift] >90 and [Days Since Last Gift] <=120 then '4: 91-120'  
ELSEIF [Days Since Last Gift] >120 and [Days Since Last Gift]<=180 then '5: 121-180'  
ELSE '6: 181+'  
END|
```

Any Questions? Happy to help!

amber@smartmetrixdata.com

<https://www.smartmetrixdata.com/>

the153effect.com



Meaningful Data

Fuel for a Growing Church

