



A STEWARDSHIP TOOLKIT for the Rural Church



Tool 6 : Planned Giving Analysis

The tool below helps to illustrate how the base of planned giving in the parish is constructed. Some parishes are very dependent on one or two donors, and are unaware of the fact. This tool helps demonstrate this. It can also be useful to allow planned givers to see where they fit in relation to others. Many people giving a small amount have no idea of the generosity of others.

Note : To use the tool, you need a minimum of 12 planned givers in the parish.

PLANNED GIVING ANALYSIS :

Band	Givers	£ Weekly Equivalent	Annual Giving	% of total giving	Cumulative %
A		> 15.00			
B		10.00 - 14.99			
C		5.00 – 9.99			
D		2.50 – 4.99			
E		< 2.50			
Total					
Average Gift :			per week		

NOTES :

- It is not intended that this should reveal the giving of any one person, and so the table should be constructed so that there are ideally at least three planned givers in any of the groups, and certainly at least two. Therefore the Weekly Equivalent bands may need to be adjusted to ensure that there is no one individual in a band. If there is no one in a band, the band should be left in, but blank.
- The average gift per week is calculated by dividing the total annual giving by the number of planned givers, and dividing that result by 52.
- All figures are the amounts given, and exclude any tax reclaimed under Gift Aid.
- If there is generous giving, or the church is in a wealthy area, the bands may need adjusting upwards.

A worked example is shown overleaf.

WORKED EXAMPLE

Band	Givers	£ Weekly Equivalent	Annual Giving	% of total giving	Cumulative %
A	3	>10.00	2280	32.99	32.99
B	4	5.00 – 9.99	1364	19.73	52.72
C	8	2.50 – 4.99	1736	25.11	77.83
D	18	< 2.50	1532	22.17	100
Total	33		6912	100	
Average Gift :		4.03		per week	

You will note that the top two bands £10.00 to £14.99 and £15+ have been merged as there was only one planned giver giving more than £15 per week.

The table shows :

1. The top three givers are giving a third of the parish's planned giving. This is not unusual - indeed many churches are very dependent upon the planned giving of just a couple of households.
2. The average weekly gift per giver is £4.03.
3. The number of planned givers should be compared with the Electoral Roll and the Average Weekly Attendance. If the number of planned givers is greater than the AWA, then it is likely that there is a base of support from fringe supporters. Their giving is always likely to be lower in amount per week than the committed.

GIFT AID POINTERS :

The analysis can also be used to indicate some potential additional giving. If the planned givers in bands A or B are not giving by Gift Aid, there is a reasonable chance that they will be tax payers, and it may be worth a sensitive conversation to see if they would be willing to pay by Gift Aid.

If planned givers in the lowest band are gift-aiding, then if the individual is a regular worshipping member of the church, and they are a taxpayer, there may be potential for increased giving.