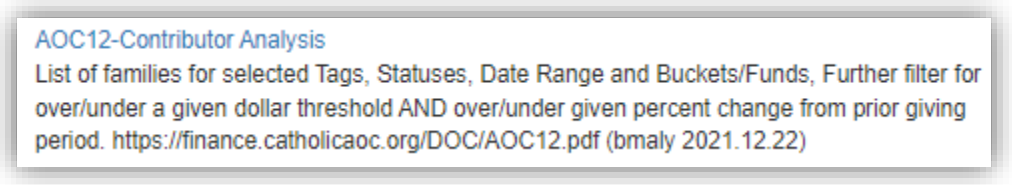
AOC12 - Contributor Analysis

List of families for selected Tags, Statuses, Date Range and Buckets/Funds, Further filter for over/under a given dollar threshold AND over/under given percent change from prior giving period. (bmaly 2022.12.22)



Purpose – This report can be used to find 'period over period' comparisons.

- Scenario 1: Find families whose contributions have dropped off by a stated percentage. Answers many possible questions: have they left the parish, did a family member lose a job, are their financial difficulties.
  - Enter a giving threshold
  - Select 'over' for the over/under
  - Enter a negative percentage
  - Select 'under' for 'Pct change over under'
- Scenario 2: Find families whose contributions have increased over a stated percentage. Is this a new family? Has the family increased giving? Check who responded to a plea for increased contributions.
  - Enter a giving threshold
  - Select 'over' for the over/under
  - Enter a percentage
  - Select 'over' for 'Pct change over under'
- Scenario 3: Find all family giving including 'zero' givers and relative change. Analyze all faily giving trends
  - Enter a giving threshold of -1 (even zero givers will be included)
  - Select 'over' for the over/under
  - Enter a percentage of -100
  - Select 'over' for 'Pct change over under'

Parameters:

- Church
  - Select from your available parishes
- Family Statuses
  - Select one or more Family Statuses
- Registered?
  - Yes/no
- Family Tags
  - Select one or more Family Tags
- Begin Date

    - Start of date range
- End Date
    - End of date range
- Prior period Definition
    - Prior period contiguous
        - Example six-month period to the same span of time contiguous to it.
    - Same period prior year
        - Example first 3 months of this year over first three months of the prior
- Buckets
    - All, Bucket 1, Bucket 2, Bucket 3
- Funds
    - All or selected (select multiple using 'shift' or 'ctl' key.
- Prior Period Giving threshold
    - Whole dollar
- Threshold Over Under
    - Select over/under
- Percent Change (whole number)
    - Enter whole number percentage
- Pct Change Over Under
    - Select Over/Under

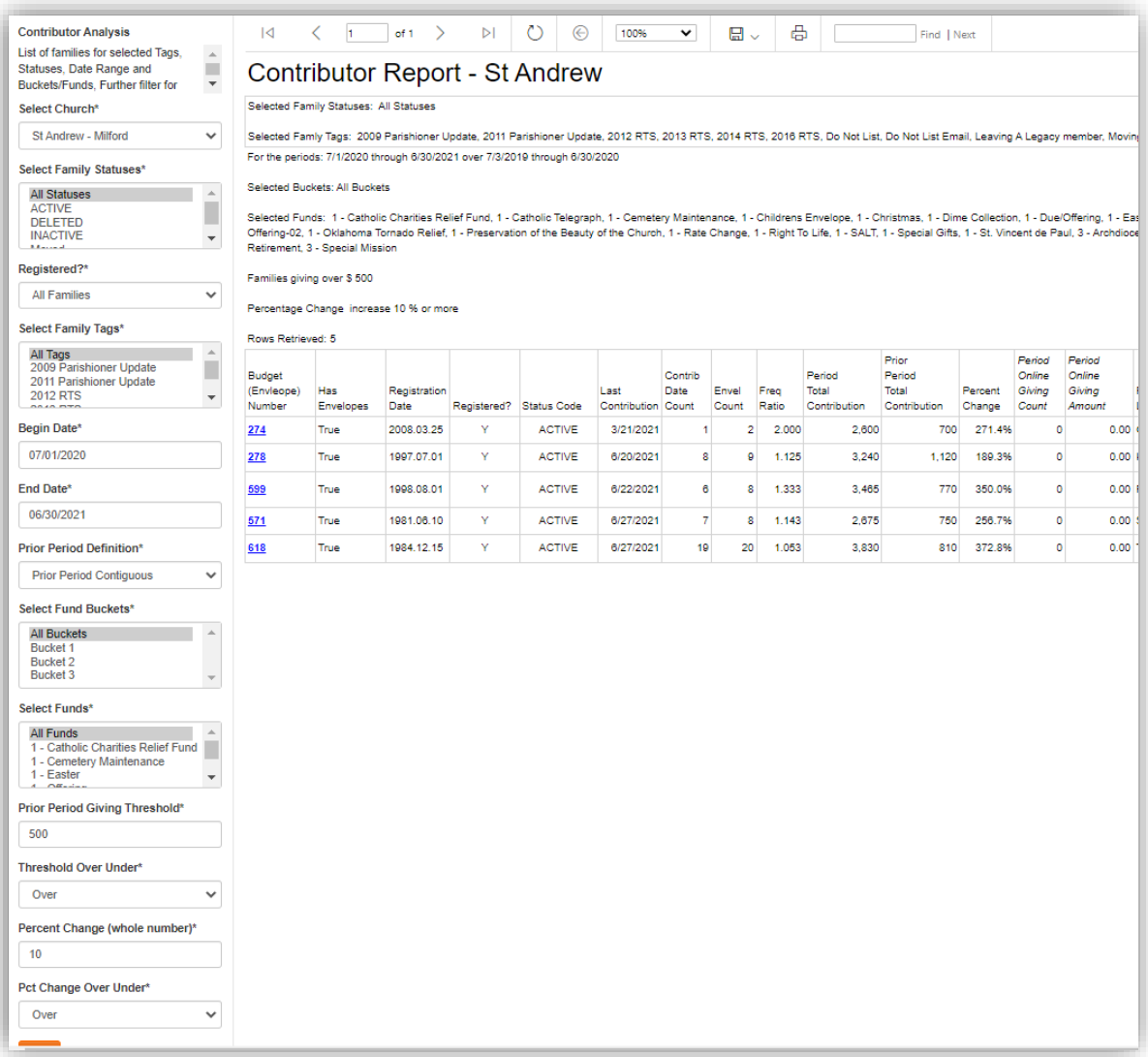
Results Explanation:

All the parameter selections are included in the header of the report.

Columns

- Budget (Envleope) Number - Hyperlink to the family record
- Has Envelopes – True or False indicating the 'Has envelopes' checkbox on 'Administration' tab under the family record.
- Registration Date – From the 'Administration' tab under the family record.
- Registered? - From the 'Churches' tab and the 'radio button' status (unregistered would be false).
- Status Code - Family Status
- Last Contribution – Last recorded contribution date.
- Contrib Date Count - Within the selected date range, how many contribution dates.
- Envel Count – For the contribution dates, how many entries.
- Freq Ratio – Ratio of envelope count to contribution dates.
- Period Total Contribution – total of all contributions in the select date range.
- Prior Period Total Contribution- total of all contributions in the prior analysis period.
- Percent Change Period – Period to period percent change.
- Online Giving Count – for the selected range, the number of transactions from online entries (indicated by 'imported' in the transaction detail
- Period Online Giving Amount – for the selected range, the sum of the transactions from online entries (indicated by 'imported' in the transaction detail

- Family Last Name
- Family First Name
- Street
- City
- State
- Zip Code
- Phone Number
- Email Address – From the family record
- Tags – all tags in which the family is found



Contributor Analysis

List of families for selected Tags, Statuses, Date Range and Buckets/Funds, Further filter for

Select Church*

St Andrew - Milford

Select Family Statuses*

All Statuses
ACTIVE
DELETED
INACTIVE

Registered?*

All Families

Select Family Tags*

All Tags
2009 Parishioner Update
2011 Parishioner Update
2012 RTS

Begin Date*

07/01/2020

End Date*

06/30/2021

Prior Period Definition*

Prior Period Contiguous

Select Fund Buckets*

All Buckets
Bucket 1
Bucket 2
Bucket 3

Select Funds*

All Funds
1 - Catholic Charities Relief Fund
1 - Cemetery Maintenance
1 - Easter

Prior Period Giving Threshold*

500

Threshold Over Under*

Over

Percent Change (whole number)*

10

Pct Change Over Under*

Over

1 of 1 | 100% | Find | Next

Contributor Report - St Andrew

Selected Family Statuses: All Statuses

Selected Famly Tags: 2009 Parishioner Update, 2011 Parishioner Update, 2012 RTS, 2013 RTS, 2014 RTS, 2016 RTS, Do Not List, Do Not List Email, Leaving A Legacy member, Movin

For the periods: 7/1/2020 through 6/30/2021 over 7/3/2019 through 6/30/2020

Selected Buckets: All Buckets

Selected Funds: 1 - Catholic Charities Relief Fund, 1 - Catholic Telegraph, 1 - Cemetery Maintenance, 1 - Childrens Envelope, 1 - Christmas, 1 - Dime Collection, 1 - Due/Offering, 1 - Eas Offering-02, 1 - Oklahoma Tornado Relief, 1 - Preservation of the Beauty of the Church, 1 - Rate Change, 1 - Right To Life, 1 - SALT, 1 - Special Gifts, 1 - St. Vincent de Paul, 3 - Archdioce Retirement, 3 - Special Mission

Families giving over $ 500

Percentage Change increase 10 % or more

Rows Retrieved: 5

Budget (Envleope) Number	Has Envelopes	Registration Date	Registered?	Status Code	Last Contribution	Contrib Date Count	Envel Count	Freq Ratio	Period Total Contribution	Prior Period Total Contribution	Percent Change	*Period Online Giving Count*	*Period Online Giving Amount*
274	True	2008.03.25	Y	ACTIVE	3/21/2021	1	2	2.000	2,600	700	271.4%	0	0.00
278	True	1997.07.01	Y	ACTIVE	6/20/2021	8	9	1.125	3,240	1,120	189.3%	0	0.00
599	True	1998.08.01	Y	ACTIVE	6/22/2021	6	8	1.333	3,465	770	350.0%	0	0.00
571	True	1981.06.10	Y	ACTIVE	6/27/2021	7	8	1.143	2,675	750	256.7%	0	0.00
618	True	1984.12.15	Y	ACTIVE	6/27/2021	19	20	1.053	3,830	810	372.8%	0	0.00