



# Contribution Analysis

V1.0

Scottsdale Bible Church

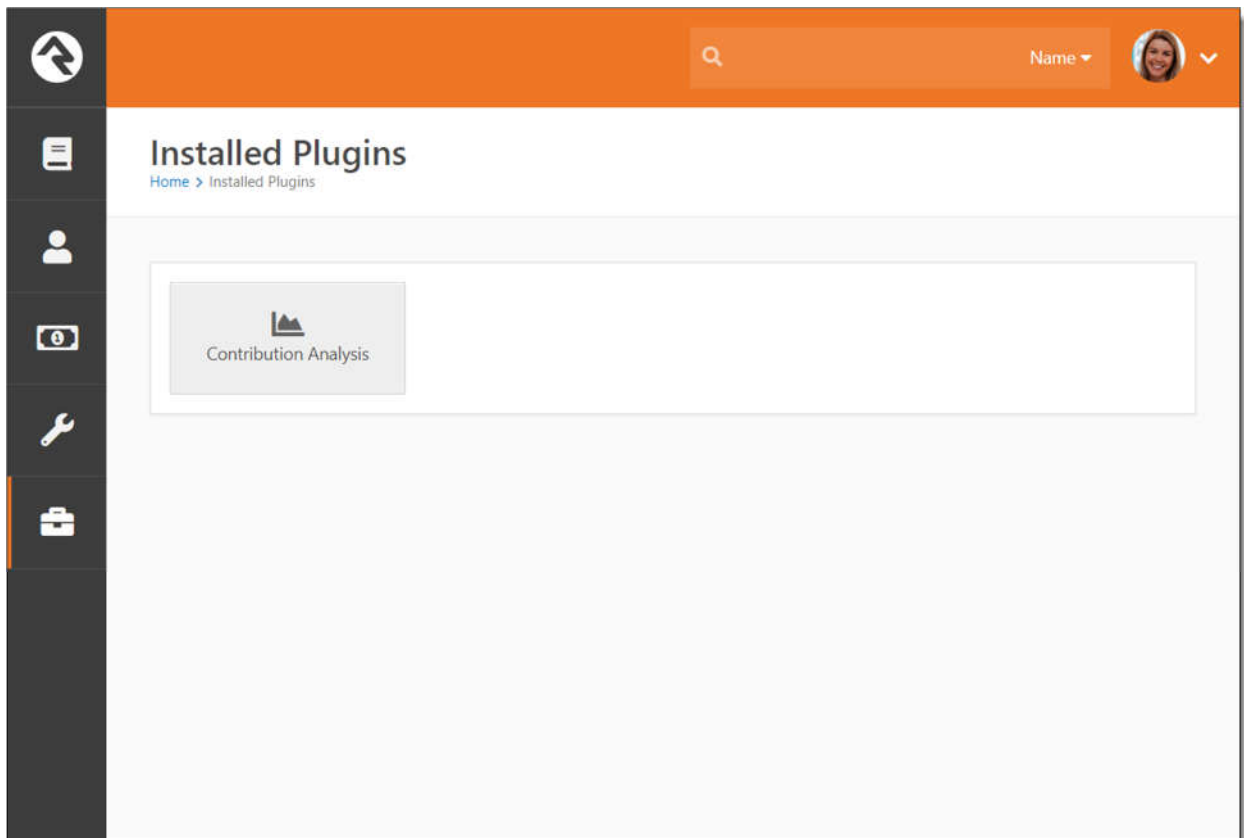
<https://scottsdalebible.com/>

## Overview

The Contribution Analysis plugin provides an interface for easily viewing various giving trends over time. Several views are provided with the plugin, but with some SQL knowledge, additional custom views can also be added.

## Installation

After installing the plugin from the Rock Shop, a new “Contribution Analysis” option will be available in the Installed Plugins area of your Rock instance.



Select this option to view the Contribution Analysis utility:



The screenshot shows the 'Contribution Analysis' web application. At the top, there is an orange navigation bar with a search icon, a 'Name' dropdown, and a user profile picture. Below this is a dark sidebar with icons for home, menu, user, eye, wrench, and briefcase. The main content area has a white header with the title 'Contribution Analysis' and a breadcrumb trail: 'Home > Installed Plugins > Contribution Analysis'. The main panel is titled 'Contribution Analysis' and contains several controls: a 'View' dropdown menu currently set to '-- Select View --', a 'Date Range' section with a blue highlight showing '1/1/2020 to 12/31/2020' and two sub-dropdowns for 'Current' and 'Year', and an 'Accounts' dropdown menu. A blue 'Update' button is located to the right of the 'Accounts' dropdown. Below these controls is a light blue box with the text: 'Confirm Filter. Select the desired 'View' and any additional filter settings and then click the 'Update' button to display your results.'

In addition to being able to select different views, each view can also be filtered by date and account(s). When selecting a view, the utility will set the initial date range filter to the range that is most appropriate for the selected view.



## Default Views

Below are the views that are included with the plugin.

### Weekend Contributions

The Weekend Contribution view will show the weekly total giving to the selected account(s) during the selected data range.

The screenshot displays the 'Contribution Analysis' interface. At the top, there is a navigation bar with a search icon, a user profile picture, and a 'Name' dropdown. Below this, the main heading is 'Contribution Analysis' with a breadcrumb trail: 'Home > Installed Plugins > Contribution Analysis'. The dashboard includes several control elements: a 'View' dropdown set to 'Weekend Contributions', a 'Date Range' field set to '1/1/2019 to 12/31/2019', a 'Previous' dropdown, a '1' field, and a 'Years' dropdown. The 'Accounts' section shows a dropdown menu with 'General Fund' selected. A line chart titled 'Weekend Contributions: 1/1/2019 - 12/31/2019' is displayed, showing the total amount given each weekend for the 'General Fund' account. The y-axis represents the amount in dollars, ranging from \$0 to \$400 in increments of \$50. The x-axis shows months from March 2019 to November 2019. The chart shows a fluctuating pattern of weekly contributions, with peaks reaching approximately \$380 and troughs near \$50. A legend indicates the data series is 'General Fund'. At the bottom of the dashboard, it states 'Crafted by the Spark Development Network / License'.



## Weekend Comparison

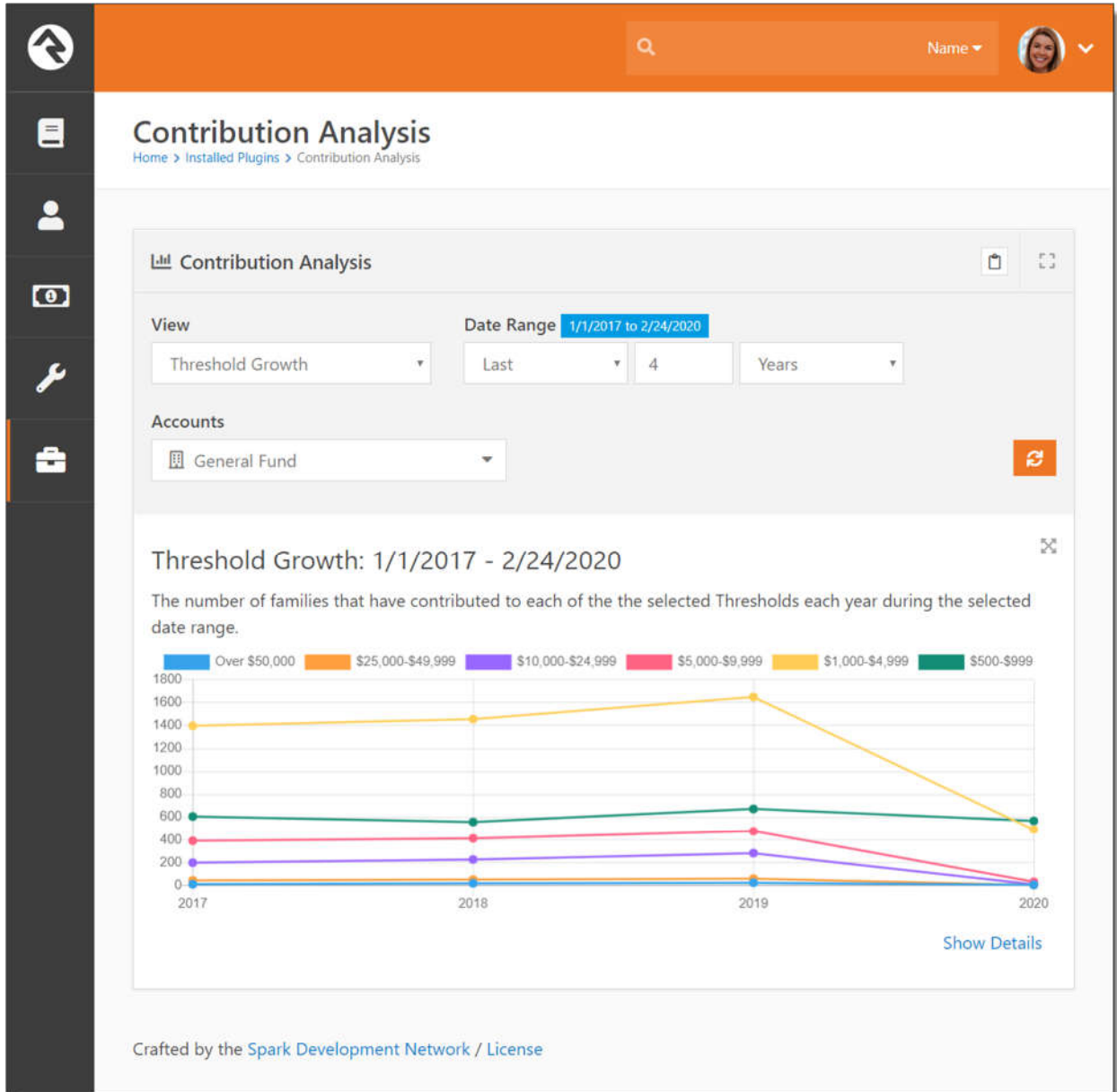
The Weekend Contribution view will show the weekly total giving to the selected account(s) during the selected data range, and the total giving for the two years previous to the selected date range for the same account(s).

The screenshot displays the 'Contribution Analysis' interface. At the top, there is a search bar and a user profile. The main title is 'Contribution Analysis' with a breadcrumb trail: 'Home > Installed Plugins > Contribution Analysis'. Below the title, the 'View' is set to 'Weekend Comparison', and the 'Date Range' is '1/1/2020 to 12/31/2020'. The 'Accounts' section shows 'General Fund'. The chart is titled 'Weekend Comparison: 1/1/2020 - 12/31/2020' and includes a legend for 'Current' (blue), 'One Year Prior' (teal), and 'Two Years Prior' (orange). The y-axis represents dollar amounts from \$0 to \$400, and the x-axis shows months from March 2020 to November 2020. The chart shows significant weekly fluctuations, with peaks often exceeding \$300. The 'Current' data shows a notable increase in late 2020 compared to previous years.

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## Threshold Growth


The Threshold Growth report will show the yearly change during the selected date range in the number of families who's total yearly giving to the selected account(s) falls within specific configured thresholds.



Note: the thresholds levels are configured through block settings.

## Family Thresholds

The Family Thresholds view shows the percentage of families in each of the configured thresholds who have given to the selected account(s) during the selected date range.

Home > Installed Plugins > Contribution Analysis
Search
Name 

### Contribution Analysis

View: Family Thresholds | Date Range: 1/1/2019 to 12/31/2019

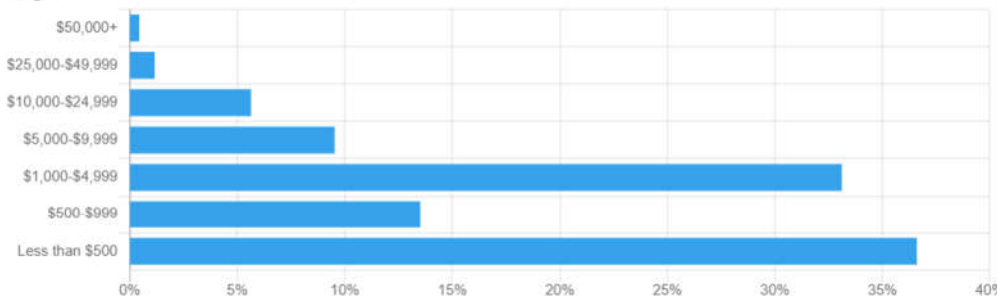
Previous | 1 | Years

Accounts: General Fund

---

#### Family Thresholds: 1/1/2019 - 12/31/2019

The percentage of families for each of the configured Threshold levels that contributed during the selected date range.



Threshold Level	Percentage of Families
\$50,000+	~1%
\$25,000-\$49,999	~2%
\$10,000-\$24,999	~6%
\$5,000-\$9,999	~10%
\$1,000-\$4,999	~33%
\$500-\$999	~14%
Less than \$500	~37%


[Show Summary](#) | [Show Details](#)

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Note: the thresholds levels are configured through block settings.

## Giving Thresholds

The Giving Thresholds view shows the total amount given in each of the configured thresholds to the selected account(s) during the selected date range.


Home > Installed Plugins > Contribution Analysis
Name 

### Contribution Analysis

View: Giving Thresholds
Date Range: 1/1/2019 to 12/31/2019

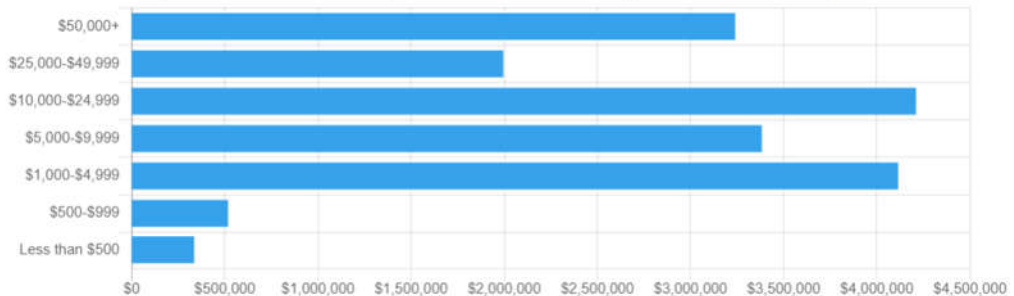
Previous
1
Years

Accounts

General Fund


#### Giving Thresholds: 1/1/2019 - 12/31/2019

The total amount given for each of the configured Threshold levels during the selected date range.



Threshold Level	Total Amount Given (Approximate)
\$50,000+	\$3,200,000
\$25,000-\$49,999	\$2,000,000
\$10,000-\$24,999	\$4,200,000
\$5,000-\$9,999	\$3,400,000
\$1,000-\$4,999	\$4,100,000
\$500-\$999	\$500,000
Less than \$500	\$300,000

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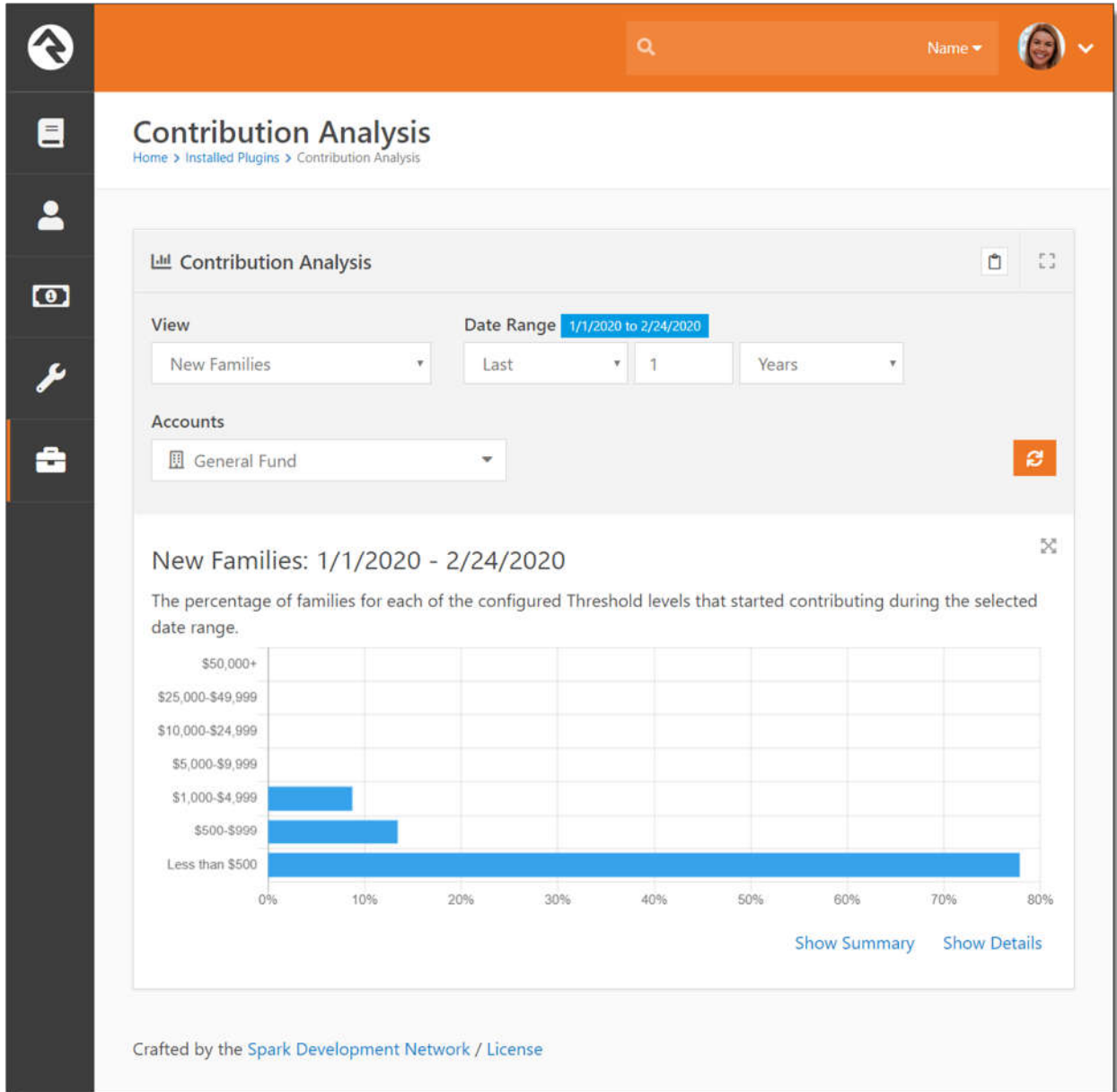
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Note: the thresholds levels are configured through block settings.



## New Families


The New Families view shows the percentage of families in each of the configured thresholds who first started giving to the selected account(s) during the selected date range.



Note: the thresholds levels are configured through block settings.

## New Giving

The New Giving view shows the total amount given in each of the configured thresholds from families who first started giving to the selected account(s) during the selected date range.

Home > Installed Plugins > Contribution Analysis
Search
Name 

### Contribution Analysis

View
Date Range: 1/1/2020 to 2/24/2020

New Giving

Last

1

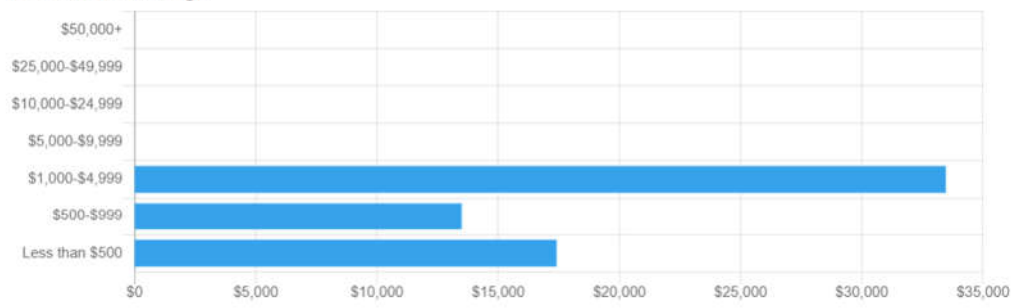
Years

Accounts
↻

General Fund

#### New Giving: 1/1/2020 - 2/24/2020

The total amount given for each of the configured Threshold levels for families that first started contributing during the selected date range.



Threshold Level	Total Amount Given (Approximate)
\$50,000+	\$0
\$25,000-\$49,999	\$0
\$10,000-\$24,999	\$0
\$5,000-\$9,999	\$0
\$1,000-\$4,999	\$33,000
\$500-\$999	\$13,500
Less than \$500	\$17,500

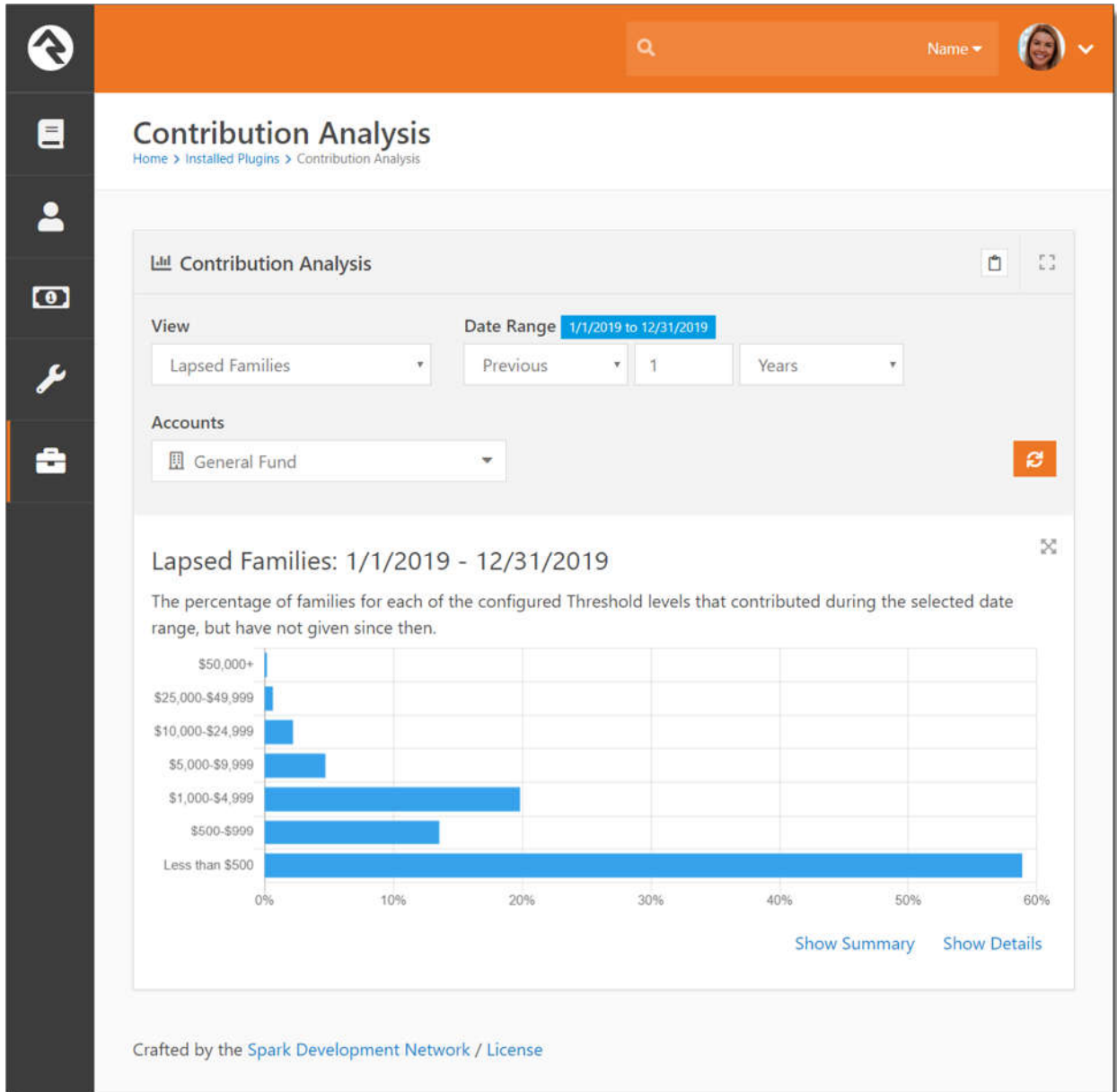
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Note: the thresholds levels are configured through block settings.

## Lapsed Families


The Lapsed Families view shows the percentage of families in each of the configured thresholds who were giving to the selected account(s) during the selected date range, but have not given anything since that date range.



Note: the thresholds levels are configured through block settings.

## Lapsed Giving

The Lapsed Giving view shows the total amount given in each of the configured thresholds from families who were giving to the selected account(s) during the selected date range, but have not given anything since that date range.

Home > Installed Plugins > Contribution Analysis
Search
Name 

### Contribution Analysis

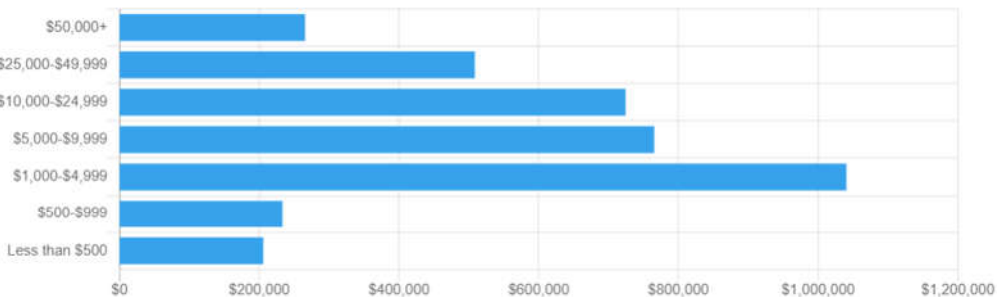
View: Lapsed Giving    Date Range: 1/1/2019 to 12/31/2019

Previous 1 Years

Accounts: General Fund

#### Lapsed Giving: 1/1/2019 - 12/31/2019

The total amount given for each of the configured Threshold levels for families that contributed during the selected date range, but have not given since then.



Threshold Level	Total Amount Given (Approximate)
\$50,000+	\$250,000
\$25,000-\$49,999	\$500,000
\$10,000-\$24,999	\$750,000
\$5,000-\$9,999	\$750,000
\$1,000-\$4,999	\$1,050,000
\$500-\$999	\$250,000
Less than \$500	\$200,000

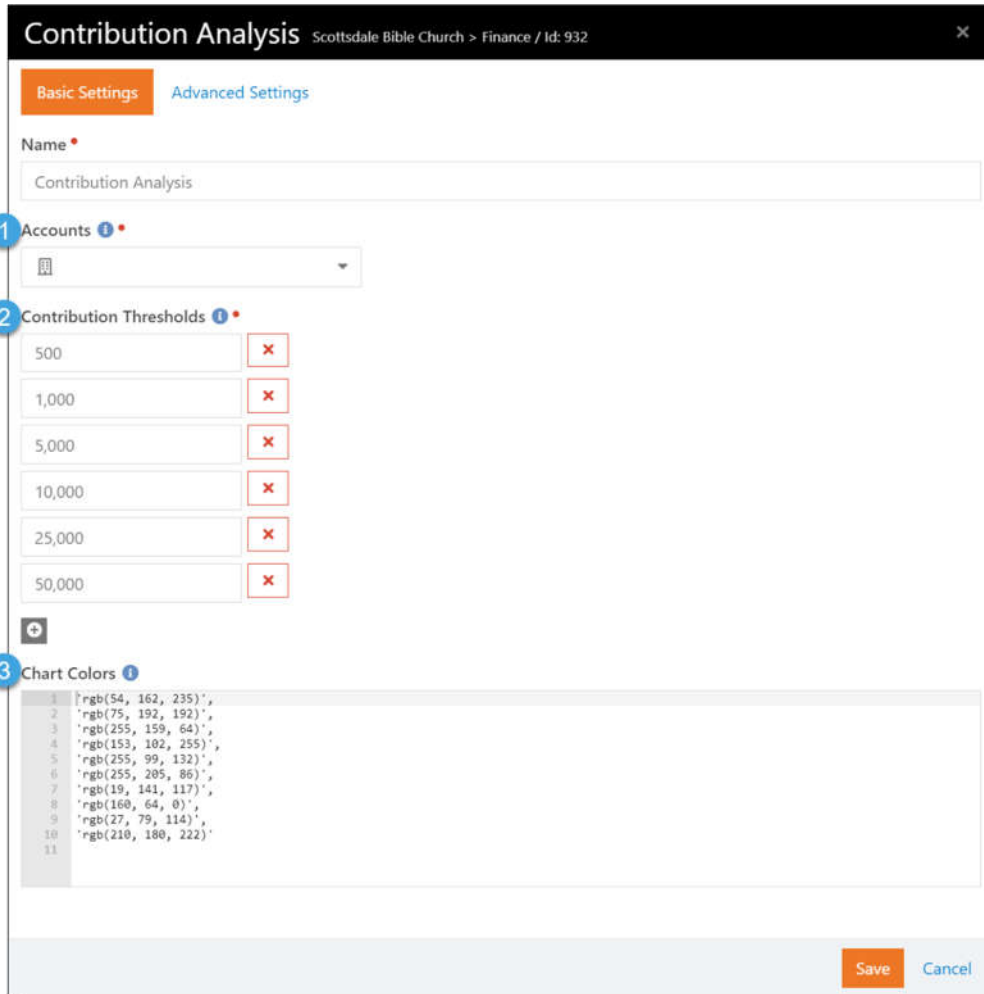
[Show Summary](#)    [Show Details](#)

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Note: the thresholds levels are configured through block settings.

## Block Settings

The following block settings are available for the Contribution Analysis block:



**Contribution Analysis** Scottsdale Bible Church > Finance / id: 932

Basic Settings | Advanced Settings

Name \*

Contribution Analysis

1 Accounts \*

2 Contribution Thresholds \*

500 [X]

1,000 [X]

5,000 [X]

10,000 [X]

25,000 [X]

50,000 [X]

+ Add

3 Chart Colors \*

```

1 'rgb(54, 162, 235)',
2 'rgb(75, 192, 192)',
3 'rgb(255, 159, 64)',
4 'rgb(153, 102, 255)',
5 'rgb(255, 99, 132)',
6 'rgb(255, 205, 86)',
7 'rgb(19, 141, 117)',
8 'rgb(160, 64, 0)',
9 'rgb(27, 79, 114)',
10 'rgb(210, 180, 222)',
11

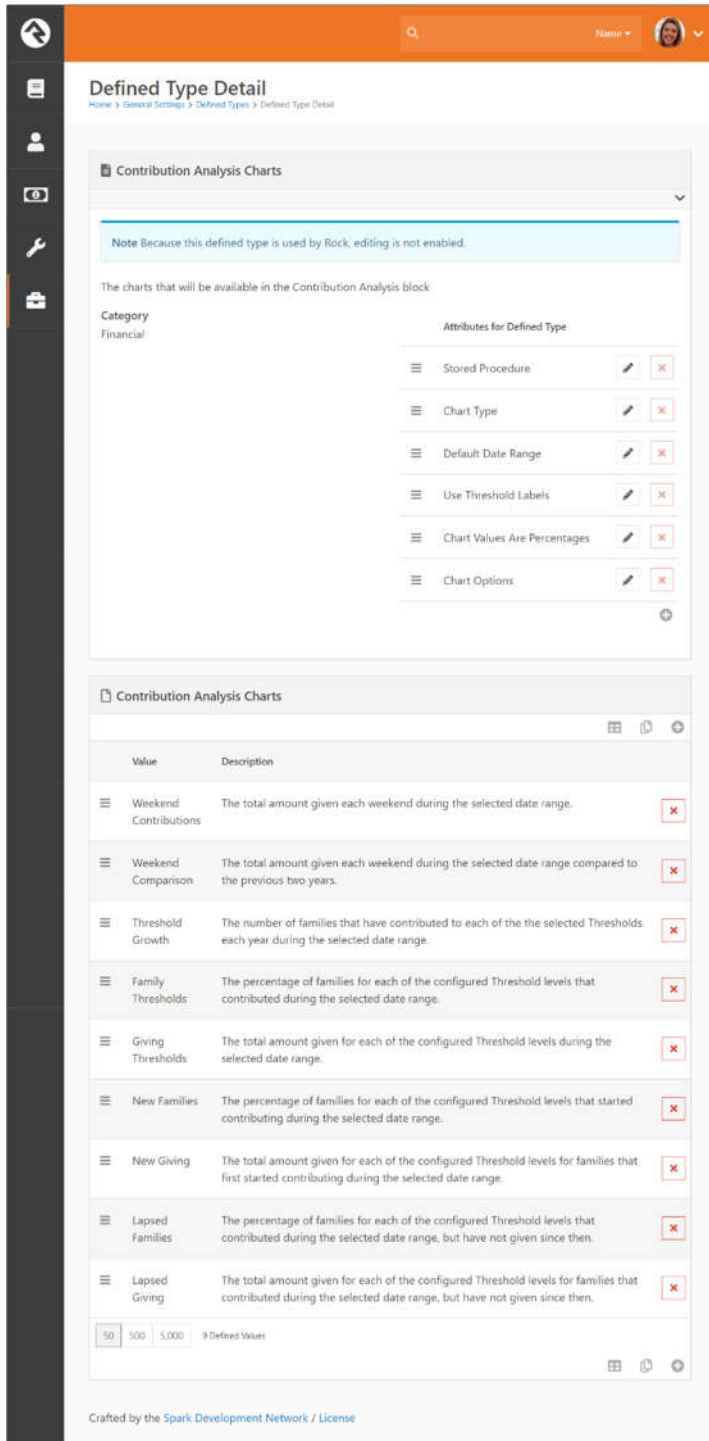
```

Save Cancel

1. **Accounts:** This setting allows pre-configuring the available accounts. If one or more accounts are specified here, all the views will use these accounts and the account filter will not be displayed.
2. **Contribution Thresholds:** These are the threshold levels used by several of the views. If adding a custom view, these threshold levels will be passed to your stored procedure for grouping of results.
3. **Chart Colors:** The colors that will be used by the charts for each data segment. The default bar charts will only use the first color, but the line charts that include multiple lines will use these colors in the order that they are defined.

## Configuring Views

Each of the available views is configured using a new “Contribution Analysis Charts” Defined Type. This is accessed by selecting *Admin Tools > General Settings > Defined Types* and then selecting the “Contribution Analysis Charts” item.



The screenshot shows the 'Defined Type Detail' page for 'Contribution Analysis Charts'. The page is divided into two main sections.

**Top Section: Attributes for Defined Type**

This section is titled 'Contribution Analysis Charts' and contains a note: "Note Because this defined type is used by Rock, editing is not enabled." Below the note, it states: "The charts that will be available in the Contribution Analysis block".

Category	Attributes for Defined Type
Financial	<ul style="list-style-type: none"> <li>Stored Procedure</li> <li>Chart Type</li> <li>Default Date Range</li> <li>Use Threshold Labels</li> <li>Chart Values Are Percentages</li> <li>Chart Options</li> </ul>

**Bottom Section: Contribution Analysis Charts**

This section displays a list of charts with columns for 'Value' and 'Description'. Each row includes a red 'X' icon for deletion.

Value	Description
Weekend Contributions	The total amount given each weekend during the selected date range.
Weekend Comparison	The total amount given each weekend during the selected date range compared to the previous two years.
Threshold Growth	The number of families that have contributed to each of the the selected Thresholds each year during the selected date range.
Family Thresholds	The percentage of families for each of the configured Threshold levels that contributed during the selected date range.
Giving Thresholds	The total amount given for each of the configured Threshold levels during the selected date range.
New Families	The percentage of families for each of the configured Threshold levels that started contributing during the selected date range.
New Giving	The total amount given for each of the configured Threshold levels for families that first started contributing during the selected date range.
Lapsed Families	The percentage of families for each of the configured Threshold levels that contributed during the selected date range, but have not given since then.
Lapsed Giving	The total amount given for each of the configured Threshold levels for families that contributed during the selected date range, but have not given since then.

At the bottom of the list, there are input fields for values: 50, 500, 5,000, and a label 'Defined Values'.

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## View Details

Each View has the following settings:

**Defined Value** Id: 766
✕

Edit defined value for Contribution Analysis Charts

- 1
**Value** \*
- 2
**Description**
- 3
**Stored Procedure** ?
- 4
**Chart Type**  
 None  Line  Horizontal Bar
- 5
**Default Date Range** 1/1/2017 to 2/28/2020  

Last
4
Years
- 6
**Use Threshold Labels**
- 7
**Chart Values Are Percentages**
- 8
**Chart Options**  

```

1 |   tooltips: {
2 |     callbacks: {
3 |       label: function(tooltipItem, data) {
4 |         return commaify(tooltipItem.value);
5 |       }
6 |     }
7 |   },
8 |   scales: {
9 |     xAxes: [{
10 |       type: 'time',
11 |       time: {
12 |         unit: 'year',
13 |         displayFormats: {
14 |           'month': 'YYYY',
15 |           'quarter': 'YYYY',
16 |           'year': 'YYYY',
17 |         },
18 |         tooltipFormat: 'YYYY'
19 |       }
20 |     }
21 |   }
                
```

Save
Cancel

1. **Value:** This is the name of the View. This value will be used for the “View” dropdown in the Contribution Analysis block.
2. **Description:** The description of the view. This value will be displayed in the Contribution Analysis block after selecting the view. It helps the user to understand what date is being displayed by the chart.



3. **Stored Procedure:** This is the stored procedure that will be run to retrieve the data for the chart when user selects this view.
4. **Chart Type:** Defined what type of chart is being used.
5. **Default Date Range:** This is the date range that will be set in the Contribution Analysis block when the user selects this view. They will be able to change it, but it's helpful for them to know what the intended default range should be.
6. **Use Threshold Labels:** Indicates if the threshold labels configured in the block settings should be used as the chart.js labels.
7. **Chart Values Are Percentages:** Indicates if the values for the chart are percentages. If so, the values returned by stored procedure will be rounded to two decimal places.
8. **Chart Options:** The charts are displayed using chart.js. Any options specified here will be added to the "[options](#)" configuration for chart.js when it renders the chart.