

# Contributions: RISK/SOS

For the past several years, Shelby has used a user-defined report called RISK/SOS, found in the Attendance module. This report provides a grading system that ranks each individual by how often he or she attends during a specified period of time, and how this attendance pattern compares against the previous period.



Using this grading system, you can run reports to retrieve the names and contact information of attendees who are starting to "slip out the back door." You can also find attendees with exemplary attendance for volunteer placement or to assign the individual additional responsibilities.

Attendance history is not the only metric that can be used to measure the spiritual health of an attendee. Studies show that dwindling donations are the first sign that members have become discouraged or uninterested in their church. Additionally, almost every church has members who cannot attend, such as missionaries and shut-ins. Therefore, many churches are beginning to examine giving patterns for additional insight.

To accommodate these churches, the Contributions module uses a variation of the RISK grading scale, which is being introduced on the *Shelby spring 2006* release CD. This new functionality is called Contributions RISK/SOS.



## Jhe "Simple at Risk" Report

You will need a firm understanding how RISK/SOS works to successfully analyze most of the Contribution RISK/SOS reports. However, Shelby has included a "Simple at Risk" report that produces the names of individuals who are likely slipping out the back door, along with their contact information.

If you feel that this one report will suit your needs, read just the instructions below to learn how to run this report. If you want to learn more about the other Contribution RISK/SOS reports, skip this section and then read the subsequent sections of this document.

- 1) Start Shelby v5.
- 2) Locate and click on the Contributions Link.
- **3)** Click **Reports** on the Contributions Home Base screen.
- 4) Choose RISK/SOS from the menu.



- **5)** Select **Simple At RISK** using the Report Type pull-down field.
- 6) Enter the most recent Sunday's date in the Week Ending Date.
- 7) Select the number of weeks of history you wish to analyze using the # of Weeks in Term pull-down field.







- 8) Select the Mark with Contribution RISK/SOS Profiles checkbox if you wish to place a special Contribution RISK/SOS profiles on the records selected by the report. For more information about these profiles, see page 19.
- **9)** Select the **Sort and Page Break** checkbox if you wish Shelby to calculate separate RISK/SOS scores for each purpose.
- **10)** Click the **Include/Exclude** button to add or remove certain purposes from the RISK/SOS calculation.
- **11)** Click the **OK** button to run the report.

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4	Name	Home Phone	E-mail	% Change Avg. Gift
5	Addams, Mr. Gomez (#206)	555-5555		-22.23
6	Anderson, Mrs. Margaret (#237)	(901) 555-5664		-100
7	Barone, Mr. Raymond -Ray(#359)	555-6663		-100
8	Bentley, Mr. Christopher -Chris(#66)	555-4700	Cbent@aol.com	-100
9	Burns, Mr. George (#165)	555-4646		-100
10	Cleaver, Mr. Ward (#182)	(901) 555-9812		-100
11	Douglas, Mr. Steven -Steve(#215)	555-4422		-100
12	Edwards, Blake (#24)	(901) 555-2345	ru@simpleemail.net	-32.98
13	Flintstone, Mr. Fred (#69)	(901) 757-2372	fred@bedrock.net;gtowncofc@yahoo.com	-12.29
14	McCain, Mr. Lucas (#378)	555-6627		-100
15	Nelson, Capt. Anthony -Tony(#502)	(901) 555-2442		-100
16	Nelson, Mr. Ozzie (#172)	555-4714		-100
17	Norton, Mr. Edward -Ed(#180)	555-9921		-100
18	Petrie, Mr. Robert -Rob(#176)	555-3333		-6.97
19	Ricardo, Mr. Richard -Rickey(#174)	555-7751		-100
20	Rubble, Mr. Barney (#73)	853-1233	Barney@bedrock.com	-1.16
21	Zimmerman, Mr. David -Dave(#61)	555-1830	Zimmer@OUKID.com	-100
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#### What is the **RISK/SOS** grading scale?

Analyzing how RISK/SOS works in the Attendance module will help you understand use Contribution RISK/SOS.

What information would you need to grade an individual based on their attendance? For starters, you would need to know how many times the individual came to church during a given time period.

For example, if an attendee were present at Sunday School **nine** out of **thirteen** weeks, you would likely consider this person a regular attendee.

However, the number of times a person was present does not always present an accurate picture of spiritual growth. Assume a person attended **four** out of **thirteen** weeks. Although this person would be considered a sporadic attendee, this attendee may have attended Sunday School only once or twice a year in the past. Therefore, to grade the attendee accurately, you would need to know if the individual's attendance was improving or getting worse.

Together, this information helps you decide which attendees need to be contacted by your outreach team.







#### The RISK Score

The first element of the grading scale, the **RISK** score, works very similar to the A,B,C,D,F grading scale used in some elementary schools. Each attendee is first assigned a letter-grade based on the number of times they attended. For example, you may have set up your scale so that:

If attendee attended:	Received a Grade of:
10 to 13 times out of 13 weeks	A
7 to 9 times out of 13 weeks	B
4 to 6 times out of 13 weeks	C
2 to 3 times out of 13 weeks	D
0 to 1 times out of 13 weeks	F

Each grade then corresponds to a RISK grade. The RISK grades are:

**R** stands for *Regular Attendee* 

stands for *Irregular Attendee* 

**S** stands for *Sporadic Attendee* 

K stands for *Non-Attendee* 

Attendees who scored an A or B receive an **R** grade. Attendees who scored a C receive an **I** grade. Attendees who scored a D receive an **S** grade. Finally, those with an F receive a **K** grade.



#### Why are there Five Letter Grades?

Shelby has incorporated a five-letter grade system. In doing so, you can split your regular attendees (hopefully the majority of your attendees) into two groups. This will help you determine which regular attendees are *sliding* without having to deem them as an "irregular attendee". If desired, you can set the grading score for **A**'s and **B's** equal. This will, in effect, allow you to use a four-letter grade system instead.



#### Jhe **RISK/SOS** Scale is Adjustable

In the example above, we assumed a thirteen-week period. It is important to note, however, the period length is user-defined; you can create a period of any duration. The *number of meetings attended* range for each grade level is also not fixed. You could create a scale so that anyone who attends at least half of the meetings receive an **A** grade, or anyone who does not have perfect attendance receives an **F**, and so on.

## Jhe SOS Score

The second element is the **SOS** score. SOS is an acronym standing for "Soaring," "Ongoing," and "Sliding." This score is also based on the *A*,*B*,*C*,*D*,*F* scale. After Shelby determines the RISK score for the current period, it will also calculate the RISK score for each individual for the previous period. If this score went up, then the individual is given a "Soaring" grade. If the score stayed the same, then the individual is given an "Ongoing" grade. If the score went down, then the individual receives a "Sliding" grade.





## How Does RISK/SOS Apply to Contributions?

Like the Attendance module, the Contributions RISK/SOS report also gives each donor an *A*,*B*,*C*,*D*,*F* grade. However, it does not grade an donor on how much they gave. Instead, Contributions RISK/SOS grades based on the *change in giving*.

The overall change in giving is calculated by three aspects, each displayed in separate columns on the Contributions RISK/SOS reports:



- Comparing the <u>number</u> of contributions in the selected period to the previous period, or *"Percent Change in Times Given"*
- 2) Comparing the <u>average gift amount</u> per gift in the selected period to the previous period, or *"Percent Change in Average Gift"*
- **3)** A <u>composite</u> score (average) of 1) and 2)

#### Calculating "Percent Change in Jimes Given"

First, Shelby will calculate the total number of times each giver made a donation. Then, Shelby will calculate the total number of times each giver made a donation for the previous four weeks. If the number of donations made during the selected period is close to the same number made the previous period by a particular contributor, then that contributor receives an **A** grade. The fewer the number of gifts made during the selected period compared to the number of the previous period, then the lower the grade.



After a five-letter grade is associated with each person, the donor receives a **RISK** and **SOS** grade, calculated much in the same way as for attendance. If an individual received an **A** or **B** grade, they receive an **R** score. A **C** grade receives an **I** score, and so on. If the grade improved during the selected period, then the contributor receives a "**Soaring**" SOS score. If the grade remains the same, the contributor receives an "**Ongoing**" score. If the grade went down, the contributor receives a "**Sliding**" score.

Take a four-week example, starting with May 1<sup>st</sup> and ending with May 28<sup>th</sup> for a contributor named Bob. Assume that you have customized your giving scale so that:

- If a contributor gives as much (or more) during the current period as the previous period, he receives an **A**.
- If a contributor gives 75% to 99% as much during the current period as the previous period, he receives a **B**.
- If a contributor gives 50% to 74% as much during the current period as the previous period, he receives a **C**.
- If a contributor gives 25% to 49% as much during the current period as the previous period, he receives a **D**.
- If a contributor gives less than 25% during the current period (or, gave nothing but gave during the previous period), he receives an **F**.

If Bob gave **5** times for the selected period (May 1<sup>st</sup> through May 28<sup>th</sup>), but gave **8** times in the previous period (April 2<sup>nd</sup> through April 30<sup>th</sup>), he would receive a **C** grade. Therefore he would receive an **I** RISK score and a "**Sliding**" SOS score for his *percent change in times given* column.

If Bob gave **7** times for the selected period and **6** times for the previous period, he would receive an **A** grade, which transposes to a RISK and SOS score of **R** and **"Soaring"**, respectfully.



## Calculating "Percent Change in Average Gift"

Next, Shelby will calculate *percent change in average gift* by finding the average dollar amount of all the gifts in the current period and comparing it to the average of all gifts in the previous period. Each record then receives a letter-grade based on the change from the selected period to previous period, and then this grade is transposed to a RISK and SOS grade.

Back to our example, assume Bob gave \$25 on May 28<sup>th</sup>, \$50 on May 21<sup>st</sup>, \$75 on May 14<sup>th</sup>, and \$100 on May 7<sup>th</sup> for an **average gift of \$62.50**. However, Bob gave \$100 for each Sunday during the previous period (on April 30<sup>th</sup>, 23<sup>rd</sup>, 16<sup>th</sup>, and April 9<sup>th</sup>), for an **average gift of \$100**. Therefore, Bob's giving for the selected period dropped down to 62.5% of the previous period (a 37.5% drop). Bob would receive a **C** grade, which would transpose to an **R** and **"Sliding"** RISK/SOS score.

#### Calculating the Composite Score

The composite score is simply the average of the two five-letter grades found in the *percent change in times given* and *percent change in average gift* columns. For example, if Bob received an **A** in the first column, and a **C** in the second column, his composite grade would be a **B**.

Shelby users will find the composite score very useful. The *percent change in times given* or *percent change in average gift* scores alone do not always tell the whole story when measuring giving patterns.

For example, assume Bob normally gives \$50 a week to the church, but decides to start giving \$200 a month instead. If you were to look at the *percent change in times given* score alone, you might assume that he was slipping in his giving since he went from giving four times a month to one. In actuality, he is still a regular giver.

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Likewise, if Bob were originally giving a once-a-month gift of \$200 and decided to start giving \$50 a week instead, you might also erroneously assume that he were slipping in his giving, when in fact he was only giving less often.

The composite score, assuming that the grading scale for both columns were the same, would eliminate both scenarios and give you an accurate measurement of Bob's spiritual growth.

So what is the point of having both columns? Why doesn't Shelby simply display the composite column? There are two reasons Shelby provides you with data for these two metrics.

Firstly, you may care less about the number of times an individual gives and care more about the fluctuation in their total giving amount. Therefore, you could weight the *percent change in average gift* column slightly heavier than the *percent change in times given* column. Therefore, the first reason for keeping these metrics separate is so that you can **use a different scale for each column**.

Secondly, your church may want to encourage your congregation to give more regularly to help with budget planning. Scoring each column separately would allow you to run your RISK/SOS report using only the *percent change in times given* column, giving you only the information you really need. Therefore, the second reason for keeping these metrics separate is **to produce only the desired information** on your reports.

## A Final Note of Gifts

It is important to note that every time money is given to a different purpose, this is considered a separate gift. For example, if a contributor writes a \$200 check and asks that half go to your TITHES purpose and the other half go to your BUILDING purpose, Shelby counts this as two separate \$100 gifts. Keep this in mind when analyzing your reports.



## Creating a New Grading Scale

- 1) Start Shelby v5.
- 2) Locate and click on the Contributions link.
- **3)** Click **Utility** from the menu bar at the top of the *Contributions Home Base* screen.
- 4) Choose RISK/SOS
  Comparison Information from the menu.



5) Note that four grading scales have already been created. These grading scales come preset upon loading the *spring 2006* CD (version 5.6.1000). You can alter these scales at any time by double-clicking on the desired scale. To create a new grading scale, click the Add New button at the bottom of the window.

٩	⊳ RI	SK / SOS	Compar	rison Info	ormation	)		
[		# Weeks	A Min. (Times)	A Score (Times)	B Min. (Times)	B Score (Times)	C Min. (Times)	E
[	•	4	0.00	100	0.00	100	50.00	75 1
[		6	0.00	100	0.00	100	50.00	75
[		13	0.00	100	0.00	100	50.00	75 (
		26	0.00	100	0.00	100	50.00	75
	•	1						
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6) Enter the period length in the # Weeks field at the top of the Assign RISK/SOS Scores window. For this example, enter 8 in the field to create a new eight-week period grading scale.







7) Fill in the percent (%) fields under the % change in times given and % change in average gift columns. Notice that the figure you enter in the % column is the *drop* in percentage of change. Three example scales, along with the appropriate input, has been created in the illustration below; however, feel free to create you own.

#### The 25-point Grade Scale, as outlined in previous sections

- No Change in Giving = A (or, a zero percent change)
- Contributor Gives at Least 75% in current period as previous period = B (or, no more than a 25% change)
- Contributor Gives at Least 50% in current period as previous period =
   C (or, no more than a 50% change)
- Contributor Gives at Least 25% in current period as previous period = D (or, no more than a 75% change)
- Contributor gave nothing during current period, but gave last period
   = F (or, a complete 100% change)

#### The 10-point Grade Scale

- 90% to 100% = **A** (or, no more than a 10% drop in change)
- 80 to 89% = B (or, no more than a 20% change)
- 70 to 79% = C (or, no more than a 30% change)
- 60 to 69% = D (or, no more than a 40% change)
- 59% or lower = **F** (or, anything over a 41% change)

% Change	(Drop) in 1	imes Given	∼% Change (	Drop) in A	vgerage Gift	Comp	osite
	%	Score		*	Score		Score
A Minimum	.00		A Minimum	.00		A Minimum	
B Minimum	25.00		B Minimum	25.00		B Minimum	
C Minimum	50.00		C Minimum	50.00		C Minimum	
D Minimum	75.00		D Minimum	75.00		D Minimum	
F Minimum	100.0		F Minimum	100.0		F Minimum	

# Weeks 8      % Change (Drop) in Times Given    % Change (Drop) in Avgerage Gift      % Score    % Score      % Minimum 10.00    A Minimum 10.00      B Minimum 20.00    B Minimum 20.00
% Change (Drop) in Times Given      % Change (Drop) in Avgerage Gift      Composite        %      Score      % Score      Score        A Minimum      10.00      B Minimum      8 Minimum      8 Minimum      8 Minimum
%      Score      %      Score      Score      Score      A Minimum        A Minimum      10.00
A Minimum      10.00      A Minimum      10.00      A Minimum        B Minimum      20.00      B Minimum      20.00      B Minimum      B Minimum
B Minimum 20.00 B Minimum 20.00 B Minimum
C Minimum 30.00 C Minimum 30.00 C Minimum
D Minimum 40.00 D Minimum 40.00 D Minimum
F Minimum 41.00 F Minimum 41.00 F Minimum
Apply QK Cancel





#### The Elementary School Grade Scale

- 93% to 100% = A (or, no more than a 7% drop in change)
- 85 to 92% = B (or, no more than a 15% change)
- 75 to 84% = C (or, no more than a 25% change)
- 70 to 74% = D (or, no more than a 30% change)
- 69% or lower = **F** (or, anything over a 31% change)

% Change (Drop) in Tim	es Given	-% Change (Drop) in A	Avgerage Gift	Composite
* 5	Score	*	Score	Score
A Minimum 7.00		A Minimum 7.00		A Minimum
B Minimum 15.00		B Minimum 15.00		B Minimum
C Minimum 25.00		C Minimum 25.00		C Minimum
D Minimum 30.00	_	D Minimum 30.00		D Minimum
F Minimum 31.00		F Minimum 31.00		F Minimum

**8)** Fill in the **Score** fields under the % *change in times given* and % *change in average gift* columns. This number is an arbitrary number used to calculate the composite score, which is:



For the purposes of this example, use a four-point scoring system, as illustrated right.

Therefore, if Bob got an **A** for % *Change in Times Given* and a **D** for % *Change in Average Gift*, he would receive a composite score of 2.5 (4+1 divided by 2), which is a **C**.

% Change	(Drop) in	Times Given	% Change (I	Drop) in A	Avgerage Gift	Comp	osite
	*	Score		*	Score		Score
A Minimum	.00	4	A Minimum	.00	4	A Minimum	4
B Minimum	25.00	3	B Minimum	25.00	3	B Minimum	3
C Minimum	50.00	2	C Minimum	50.00	2	C Minimum	2
D Minimum	75.00	1	D Minimum	75.00	1	D Minimum	1
F Minimum	100.0	0	F Minimum	100.0	0	F Minimum	0





If you want to set up an unequal grading scale for the two columns, say for instance one that favored the % *Change in Average Gift* metrics slightly more than the % *Change in Times Given* metric, adjust your **Scores** columns so that the % *Change in Average Gift* scale is more heavily weighted (do not the percentage (%) columns). See the illustration below for one possibility.

Assign RISK / SOS Scores			
#Weeks 8			
% Change (Drop) in Times Given	∼% Change (Drop) in Av	gerage Gift	Composite
% Score	x	Score	Score
A Minimum .00 4	A Minimum .00	5	A Minimum 4
B Minimum 25.00 3	B Minimum 25.00	4	B Minimum 3
C Minimum 50.00 2	C Minimum 50.00	3	C Minimum 2
D Minimum 75.00 1	D Minimum 75.00	2	D Minimum 1
F Minimum 100.0 0	F Minimum 100.0	0	F Minimum 0
	Apply		K Cancel

9) Click the OK button when finished.





#### Running a **RISK/SOS** Report

- 1) Start Shelby v5.
- 2) Locate and click on the Contributions link.
- 3) Click Reports on the Contributions Home Base screen.

## 4) Choose RISK/SOS from the menu.



# **5)** Pick a RISK/SOS report type from the **Report Type** pull-down field.

Report Type:	Graph RISK 1
Week Ending Date:	Graph RISK 1 Graph RISK 2
# of Weeks in Term	Graph SDS Excel Interface
	Simple At RISK





#### 6) The report types are:

- Graph RISK 1 produces an Microsoft® Excel® spreadsheet of the total number of people in each of the RISK categories for both the % Change in Times Given and % Change in Amount Given columns, for the selected (current) period.
- Graph RISK 2 produces an Microsoft® Excel® spreadsheet of the total number of people in each of the RISK categories for both the % Change in Times Given and % Change in Amount Given columns, for the period prior to the selected (current) period.



Illustration of RISK 1 and RISK 2 reports

 Graph SOS – produces an Microsoft® Excel® spreadsheet of the total number of people in each of the SOS categories for the % Change in Times Given, % Change in Amount Given columns, and Composite columns.

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			SOS	SOS	SOS	2
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4		Sos	15	22	14	- 2
5		sOs	0	0	0	
6		soS	11	4	12	1
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 Excel Interface – produces a detailed Microsoft® Excel® spreadsheet that lists the *total number of times given* metric for the selected (current) period and its associated score, the *average gift for the selected period* metric and its associated score, and the composite score for **each individual**. The spreadsheet also contains the associated RISK and SOS scores for these figures, along with the personal contact information for each individual.

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	Anderson, Mr. Jm	(901) 555-1	0004	400 Market Blud	Collerv	UDA		0		400	0	426	400	0	400	Sabrig	Saging	Stong
÷	Anderson, Mrs. Ma	EEE 0440		1368 Babins Bas	Lonerv	U DA	20124	0	-	100	0	142	100	0	100	Searing	Coaring	Searing
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+	Rentiev Mr. Christ	666 4700	Charlena	1406 Stonewall	Mamph	a Thi	38104	0		100	0	136	100	D	100	Capring	Coarios	Caarina
	Blackwell Mr. Due	743-1234	Contragent	7401 Monce Rd	Hamph	Th	38120	e		60	0	37 6	100		76	Cirina	Coarios	Cidea
1	Bunker Mr. Archib	666,8812	-	1688 Kendale Ar	Memoh	in TN	38106	s	4	50	R	67.5	100		75	Sides	Saarina	Sidina
+	Burns Mr. George	666.4848		3037 Juca Lo	Memoh	a TN	38114	8	4	100	8	1500	100	R	100	Searing	Searing	Searing
	Cleaver, Mr. Ward	(901) 555-9	9812	6726 Whitten PI	Memoh	a TN	38133	R	1	100	R	200	100	R	100	Searing	Soaring	Searing
	Douglas, Mr. Steve	555-4422	1	1555 Peoperwor	Memph	in TN	38134	R	2	100	R	716	100	R	100	Searing	Searing	Searing
	Edwards, Blake (#	(901) 555-2	2 ru@simple	1025 Crosswind	Collery	de Th	4 3801	R	5	100	R	76	100	R	100	Searing	Soaring	Searing
	Flintstone, Mr. Fred	(901) 757-2	2 fred@bedr	780 Rock Rd	Memph	a TN	38122	s	4	50	R	160	100	1	75	Siding	Searing	Siding
1	Gutierrez, Mr. Carl	901-5786		362 New Byhale	Collerv	ile Th	4 3801	\$	4	50	R	25	100	1	75	Siding	Searing	Siding
	Holmes, Mr. Sherlo	(901) 555-1	1234	7498 Bakers Gle	Cordov	a TN	38018	R	4	100	1	117.5	75	1	87.5	Searing	Siding	Siding
	Huxtable, Dr. Heath	(901) 555-3	2435	2751 Wolfcreek	Memphi	is TN	38133	к	0	25	ĸ	0	25	к	25	Siding	Siding	Siding
	Martin, Mr. Ralph (I	(901) 555-9	9 Ralphm@1	2991 Hickory Hill	Memph	is TN	38115	s	2	50	R	25	100	1	75	Siding	Soaring	Siding
1	McCain, Mr. Lucas	555-6627		4648 Hemiock Lr	Memphi	is TN	38117	R	1	100	R	125	100	R	100	Searing	Searing	Searing
ł.	Nelson, Capt. Anth	(901) 555-2	2442	455 S Front St	Memph	is TN	38103	R	4	100	R	3750	100	R	100	Searing	Searing	Searing
	Nelson, Mr. Ozzie	(555-4714		2145 Blueridge (	Memph	is TN	38134	R	1	100	R	1500	100	R	100	Searing	Soaring	Searing
	Norton, Mr. Edward	\$555-9921		783 Porter St	Memphi	is TN	38126	R	1	100	R	300	100	R	100	Searing	Soaring	Searing
	Petrie, Mr. Robert -	555-3333		860 Keough Dr	Collerv	ile Th	1 3801	1	6	75	1	104.6666	75	1	75	Siding	Silding	Sliding
3	Ricardo, Mr. Richard	555-7751		3064 Josibpet Lr	Memph	is TN	38116	R	1	100	R	550	100	R	100	Searing	Soaring	Searing
2	Rubble, Mr. Barney	853-1233	Barney@b	8011 Macon Rd	Cordov	a TN	38018	S	4	50	R	65	100	1	75	Siding	Soaring	Silding
0	Zimmerman, Mr. Da	555-1830	Zimmer@0	6950 Scofield Cv	Cordov	a TN	38018	R	1	100	R	150	100	R	100	Soaring	Soaring	Searing
1							Avg S	core		81			96		88.5			

• **Simple At RISK** – produces an Microsoft® Excel® spreadsheet of each individual that received a *"Sliding"* SOS grade for the *% Change in Average Gift* column, along with their contact information. This is a simple report for users who do not need to learn concept behind RISK/SOS.

ء ا	Micr	osoft E	kcel - I	Book1				
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	12	3	-	fx.	-			
	A			В		C	D	E
1	RIS	sk/sos	for Fi	rst Chur	ch In The	City		
2	4 w	veeks e	nding	3/31/200	)6	1		
3								
4				lame		Home Phone	E-mail	% Change Avg. Gift
5	A	ndersor	n, Mr	Jim (#236	5)	(901) 555-5664		-100
6	H	lolmes.	Mr. Sh	nerlock (#	\$533)	(901) 555-1234		-0.05
7	H	luxtable	Dr. H	eathcliff	-Cliff(#210)	(901) 555-2435		-100
8	P	etrie, M	Ir. Rob	ert -Rob(	#176)	555-3333		-10.7
9								
10	ملما	المر رالاسم	Anne	and the second		مرديسه معمدين	-	in and a second



7) Enter in the last day of the period in the Week Ending Date field.

8) Choose the number of weeks in the period by selecting a number from the **# of Weeks in Term** pull-down field. This will select the appropriate grading scale created in the *RISK/SOS Comparison Information* area.



**9)** Deselect the % Change in Times Given and/or % Change in Average Gift to exclude the associated information.

RISK/SOS Reporting
Report Type: Graph RISK 1
Week Ending Date: 3/31/2006
# of Weeks in Term 😣 🚽
✓ Use % Change in Times Given?
In Use % Change in Average ditt?
Sort and Page Break by Purpose?
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#### 10) Select the Mark with Contribution

**RISK/SOS Profiles**, and Shelby will place four special Contributions RISK/SOS profiles on each record; one profile indicating the RISK score for the % Change in Times Given column, one profile indicating the RISK score for the % Change in Average Gift column, one profile indicating the SOS score for the % Change in Times Given column, and one profile indicating the SOS score for the % Change in Average Gift column.

CNRISKAI	RISK - Irregular Amt
CNRISKAK	RISK - None Amt
CNRISKAR	RISK - Regular Amt
CNRISKAS	RISK - Sporatic Amt
CNRISKTI	RISK - Irregular Times
CNRISKTK	RISK - None Times
CNRISKTR	RISK - Regular Times
CNRISKTS	RISK - Sporatic Times
CNSOSAON	SOS - Ongoing Amt
CNSOSASL	SOS - Sliding Amt
CNSOSASO	SOS - Soaring Amt
CNSOSTON	SOS - Ongoing Times
CNSOSTSL	SOS - Sliding Times
CNSOSTSO	SOS - Soaring Times

Today's date will be placed in the *Starting Date* on the profile.



Each time the report is run with these options selected, any existing Contributions RISK/SOS profile will be overwritten.





- **11)** Select the Sort and Page Break checkbox if you wish Shelby to calculate separate RISK/SOS scores for each purpose.
- **12)** Click the Include/Exclude button to add or remove certain purposes from the RISK/SOS calculation.
- **13)** The series of checkboxes at the bottom of the RISK/SOS Reporting window allows you to include or exclude individuals from the report based on their RISK and SOS scores.

The Compare Current Term to Previous series of checkboxes allows you to include or omit individuals with a given RISK score for the current period (taken from the Graph RISK 1 report). The Compare Previous Term to Prior series of checkboxes allows you to include or omit individuals with a given RISK score for the previous term (taken from the Graph RISK 2 report). The Include SOS Categories series of checkboxes allow you to include or omit individuals with certain SOS scores.

For example, if you wanted to include individuals who had an **A** grade in the previous period, but now have a different grade, you would select the options in the illustration to the right.

Compare Current Term To Previous	Compare Previous Term To Prior Term	Include SOS Categories
🔽 A · B	🔽 A · R	🔲 Soaring 🔪
🔽 B - R	🔽 B - R	🔽 Ongoing
∏ C·I	🔽 C-1	🗖 Sliding 🗧
🗖 D - S	🔽 D - S	
F-K	F-K	Same and

Compare Current Term To Previous	Compare Previous Term To Prior Term	Include SOS Categories
🗖 A · R	🔽 A - R	Soaring
🔽 B - R	🗖 B - R	🔽 Ongoing
🔽 C+I	□ C·I	🔽 Sliding
🔽 D - S	🗖 D - S	
F-K	F-K	mary and

Another example: if you wanted to include individuals who now have an **A** or **B** grade, but are still considered **"Ongoing"**, you would select the options in the illustration to the left.

**14)** Finally, click the **OK** button to print the report.

