



Diocese of Lansing

**PLEDGE
PROCESSING
MANUAL**

TABLE OF CONTENTS

Parish Action Timeline	2
Materials	4
Sorting the forms	4
Reviewing the pledge form	5
Attaching the DSA donor label	8
Sorting the batch	9
Completing the Parish DSA Transmittal Report	10
Payments on Previous Pledges Form	12
Depositing payments into the parish account	14
Mailing gifts to the Diocese	15
Reporting totals to the Development Department	16
Important Contact Information	17



PARISH ACTION TIMELINE

- March 7 DSA MATERIALS SHIPPED TO PARISHES
Materials arrive in parishes during week of March 7 • DSA Materials posted on diocesan website
- March 12 & 13 DSA ANNOUNCEMENT WEEKEND
Parishes announce upcoming DSA Commitment Weekend (March 19 & 20)
Lay Presenter Talk • Bulletin and Pulpit announcements • Prayers of the Faithful
Display DSA Posters • Insert DSA brochures or have available in pews
- March 14 - 18 **Pastor's/Pastoral Minister's Letter of Support mailed to all registered households prior to DSA Commitment Weekend.**
- March 19 & 20 DSA COMMITMENT WEEKEND
Play Bishop's DSA video/audio at all Masses • Pledge envelopes and pencils placed in pews
Lead in-pew solicitation process at all Masses • Bulletin & Pulpit Announcements
Prayers of the Faithful
- Week of March 21 **Bishop's Letter of Support and Prayer Bookmark mailed**
- Week of March 21 FAITH Magazine mailed to registered households
- March 26 & 27 FIRST FOLLOW UP WEEKEND
Thank people who have contributed • Bulletin and Pulpit announcements • Prayers of the Faithful
Parishes conduct in-pew process again or make certain that pledge envelopes are available either in pews or at "DSA stations" (*This process varies from parish to parish*)

PARISH ACTION TIMELINE (continued)

- April 2 & 3 **SECOND FOLLOW UP WEEKEND**
Thank people who have contributed
Parishes conduct in-pew process second time,
or make certain that pledge envelopes are available
either in pews or at “DSA stations”
- Week of April 4 **Pastor/Pastoral Coordinator follow up letter mailed to all who
have not yet contributed to DSA, MUST include a pledge envelope**
- April 9 - May 31 **FURTHER FOLLOW UP**
Thank people who have contributed • Bulletin and Pulpit Announcements
Prayers of the Faithful • Parish continues follow up efforts at all Masses
Parishes may wish to conduct telephone follow-up during this time
- April - June **Bishop’s thank you letter mailed to all who gave to DSA**
- June Pastor/Pastoral Coordinator thank you letter to all who gave to DSA
First pledge reminders mailed to all who made a pledge to DSA
- July 1 **Bishop’s follow-up letter with pledge envelope**



MATERIALS

- Leadership Resource Manual
- Pledge Processing Manual
- Pledge Envelopes
- Sets of Labels (File emailed to parishes)
- Transmittal Forms
- Transmittal Envelope
- Batch cards (six colors)
- Payments on Previous Pledges Form
- Tracking list (List emailed to parishes)

SORTING THE FORMS

Each pledge envelope will feature:

- a tear-off pledge form with donor's name, address and pledge information
- a cash, check, or credit card payment (two-sided pledge form)
- may have some other form of correspondence from the donor that should be forwarded to the diocese along with your DSA batch

Once you have removed all contents, along with the tear-off pledge form, you can dispose of the outer envelope.

REVIEWING THE PLEDGE FORM

1. As you review the pledge form, compare the actual amount of the donor's cash or check with the amount listed on the AMOUNT PAID NOW line. They must match. If the AMOUNT PAID NOW line was left blank, and there is money enclosed, be sure to write that amount on the AMOUNT PAID NOW line. If the money enclosed is different from the amount on the AMOUNT PAID NOW line, please change the amount.
2. Check one of the methods of payment – either Cash, Check or Credit Card.
3. If the donor is making a pledge only and has not included cash or a check in the envelope, be sure to write “0” on the AMOUNT PAID NOW line.
4. Carefully check the math on each pledge form. TOTAL PLEDGE AMOUNT minus AMOUNT PAID NOW must equal TOTAL PLEDGE BALANCE.
5. If the TOTAL PLEDGE AMOUNT line is left blank, and there is money in the envelope, the amount enclosed will be the TOTAL PLEDGE AMOUNT. Please be sure all lines are filled in with dollar amount enclosed.
6. Any pledge form that has a TOTAL PLEDGE BALANCE listed is considered a pledge, and needs to have the correct boxes checked for the months the donor wishes to receive pledge reminders or have payments charged to their credit card. If no boxes are checked, please take a moment to call the donor and determine the correct months before sending the pledge form to the diocese. We appreciate your help in expediting the processing of your pledge forms.
7. **Anonymous gifts** - For all cash gifts received anonymously, fill out a pledge form writing the name *Anonymous* on the **Name** line, write the total amount of cash given on the **TOTAL PLEDGE AMOUNT** line and also on the **AMOUNT PAID NOW** line. Next, put a check mark in the **CASH GIFT** box of the pledge form. **Be sure you include this gift amount on line 1. Cash/Checks Total in the AMOUNT PAID NOW column on the transmittal report.**

REVIEWING THE PLEDGE FORM

CASH OR CHECK PLEDGE FORM*

* CREDIT CARD GIFTS, USE OTHER SIDE OF FORM.

Parish Use Only
Donor Identification Label

Name _____
First Name Spouse Name Last Name

Address _____

City/State/Zip _____

Phone _____ Cell Phone _____

Email _____

Please credit my gift to _____
Parish Name Parish City

- Cash Gift
- Check (Payable to: Your Parish Name/DSA)

Total Pledge Amount \$ _____

Amount Paid Now \$ _____

Total Pledge Balance \$ _____

I wish to make my pledge payments monthly in months checked below,
please send me pledge reminders.

- July August September October November
- December January 2012 February 2012 March 2012

CREDIT CARD PLEDGE FORM

Name _____
First Name Spouse Name Last Name

Address _____

City/State/Zip _____

Phone _____ Cell Phone _____

Email _____

I wish to pay by Credit Card: VISA MasterCard Discover

Credit Card Number _____

Exp. Date _____ CVV 2 Code _____

Donor Signature _____

Parish Use Only
Donor Identification Label

Total Pledge Amount \$ _____

Amount Paid Now \$ _____

Total Pledge Balance \$ _____

I wish to make my pledge payments monthly in months checked below,
please send me pledge reminders.

July August September October November
 December January 2012 February 2012 March 2012

Please credit my gift to _____

Parish Name

Parish City

ATTACHING THE DSA DONOR LABEL

Attach the correct DSA donor label that you received from the Development Office to the pledge form. Using these labels whenever you send gifts to the diocese during the 2011 DSA helps to speed up the processing of DSA gifts at the diocese.

- PLEASE be sure to alert whoever is affixing the labels to the the pledge forms to carefully cross-check, both the first and last name written on the pledge form, with the first and last name on the printed label. This is extremely important in order for us to credit the DSA gift to the correct donor.
- The labels go over the shaded box designated for “Parish Use Only” on the upper right-hand portion of the form. Please do not place the labels over the information the donor filled out on the upper left hand portion of the stub.
- If the parish does not have a DSA label for a parishioner, please write the word “new” in the space for the label. This should be done in large clear printing.
- If the DSA label has incorrect information, please make the correction on the label (preferably in red ink) before placing the label on the envelope.

1014569
Mr. and Mrs. James Doe
~~1234 Main Street~~ 4567 Gibson Drive
Lansing, MI ~~48933~~ 48934

SORTING THE BATCH

Sort each batch of DSA envelopes into the categories listed below. Not every batch will contain enclosures in each category. Each category has a color-coded batch card that must be attached to the appropriate bundle of pledge forms. Sort all pledge forms alphabetically, by donor's last name, into the following categories:

- Pink Card - ALL CREDIT CARD GIFTS OF ANY TYPE
(This includes new donors, address correction donors, or correct/incorrect donor ID)
- Yellow Card – cash/check gifts with **incorrect** donor ID labels
(includes deceased – write deceased in red ink on the pledge form please)
- Blue Card – cash/check gifts from new donors
(except in the case of new donor credit cards, these go in credit card batch)
- Green Card - cash/check gifts with correct donor ID labels
- Manilla Card - gifts designated by donor for another parish
- Rose Card – donor declines to give at this time

By carefully following these sorting procedures, we will be able to process your parish's gifts accurately and quickly.

Credit Card Gifts
Cash/check Incorrect ID
Cash/check New Donors
Cash/check Correct ID
Other Parish
Declined

COMPLETING THE PARISH DSA TRANSMITTAL FORM

1. Please carefully **cross check and verify** that the amount enclosed with each pledge form is the same as the amount the donor has written in on the pledge form (See page 5)
2. Separate all pledge forms into the following two groups listed on the transmittal form:
Cash/Check Total Credit Card Total
3. Transfer correct totals within each group, to the Transmittal Form for the following categories:
PLEDGE CARDS AMT. PLEDGED AMT. PAID NOW
4. Attach correct batch cards to each batch of pledge forms (See page 9)
5. Enter SUBTOTAL of AMT. PLEDGED in green box on line 3 under AMT. PLEDGED column
6. Enter GRAND TOTAL AMOUNT PLEDGED in green box across from green type
7. Enter GRAND TOTAL AMOUNT PAID NOW in blue box across from blue type
*Please **do not** add in Credit Card amount in orange box on Line 2*
8. After DSA is underway, you will begin receiving **PAYMENTS ON PREVIOUS PLEDGES**
Please enter these gift amounts in the following manner:
 4. **Cash/check PAYMENT ON PREVIOUS PLEDGE, in blue box under AMT. PAID NOW**
 5. **Credit Card PAYMENT ON PREVIOUS PLEDGE, in orange box under AMT. PAID NOW**

2011



PARISH TRANSMITTAL REPORT

Diocesan Use Only

BATCH # _____

TOTAL # OF GIFTS _____

PARISH # _____ PARISH NAME _____ PARISH REPORT # _____

DATE: _____ SUBMITTED BY: _____ DAYTIME PHONE _____

	# PLEDGE CARDS	AMT. PLEDGED	AMT. PAID NOW
1. Cash/Check Total	_____	_____	_____
2. Credit Card Total	_____	_____	_____
3. SUBTOTAL	_____	_____	_____
4. Cash/Check PAYMENT ON PREVIOUS PLEDGE			_____
5. Credit Card PAYMENT ON PREVIOUS PLEDGE			_____
GRAND TOTAL AMOUNT PLEDGED (Line 3 SUBTOTAL amount under AMT. PLEDGED column)		_____	
GRAND TOTAL AMOUNT PAID NOW (Add Line 1 + Line 4 under AMT. PAID NOW column)			_____
PARISH CHECK # _____	PARISH CHECK TOTAL	\$	_____
Submit one parish check for all payments EXCLUDING credit cards.			
TOTAL # OF GIFTS DESIGNATED FOR OTHER PARISHES _____			
PLEASE: Do not combine # of gifts for other parishes with the total number of gifts for your parish			

PAYMENTS ON PREVIOUS PLEDGES FORM

Often during the DSA, donors will fill out a pledge envelope making a pledge to the DSA on one weekend, and then make a payment on that same pledge a weekend or two later. These payments should not be counted as new gifts; they are **Payments on Previous Pledges**. They do not increase your parish's pledge total, only the payment total. In order to record these gifts properly, you need to use the **Payments on Previous Pledges** form, which you printed out from the file we are emailing to you this year.

We have divided the **Payments on Previous Pledges** Form into two separate categories:

- Cash/check payment on previous pledge
- Credit card payment on previous pledge

It is important to keep these two payment types separate. If the parish indicates that a donor gave a cash or check payment, the diocese will expect the parish to forward the money. If the donor made a credit card payment, the diocese will have to collect the funds via our credit card system.

The parish is not responsible for redeeming credit card pledges.

PLEASE NOTE:

- Do not prepare a new pledge envelope for either a cash/check or a credit card payment on a previous pledge.
- Transfer this information to the Parish Transmittal Report.

PAYMENTS ON PREVIOUS PLEDGES FORM

Parish number: _____ Parish name: _____
 Report number: _____ Report date: _____

CASH/CHECK PAYMENTS ON PREVIOUS PLEDGES

Donor Number	Donor Name	Amount	Check #

CREDIT CARD PAYMENTS ON PREVIOUS PLEDGES

Donor Number	Donor Name	Credit Card #	Exp. Date	CVV2

DEPOSITING PAYMENTS INTO THE PARISH ACCOUNT

- All cash and check payments from your parishioners should be deposited into your parish's bank account.
- Parish writes a single check made out to Diocesan Services Appeal for the total amount of all payments included in the batch.
- If a donor has placed a DSA pledge envelope in your parish's collection basket and designated the gift to another parish other than your own, **please do not** count this gift amount toward your parish total. These gifts need to be bundled together with an **Other Parish** batch card attached, so the diocese can credit the appropriate parish according to the donor's wishes. Then, enter the total number of gifts for other parishes, on the # **Gifts for other parishes** line on the Parish Transmittal Report.

PLEASE NOTE: The Diocese cannot process any batches that contain checks written from your parishioners. All checks must come from your parish, written to the Diocesan Services Appeal, for the total amount of the batch you are sending.



MAILING GIFTS TO THE DIOCESE

The original (top sheet) of the Transmittal Form should be retained at the parish and used to prepare the deposit of the donor checks and cash to the parish bank account.

The bottom copy of the Transmittal Form (made of a heavier paperboard) should be sent along with a parish check (made payable to “Diocesan Services Appeal”) in the amount indicated on the line, “Parish Check Total.” The transmittal envelope should also include all categories of gift forms (sorted, alphabetized, and labeled) and the Payments on Previous Pledges Form (if applicable).

The transmittal of DSA pledges should be done on a weekly basis. To ensure prompt handling, please mail your special white DSA transmittal envelopes to:

Development Department, 228 North Walnut Street, Lansing, MI 48933-1122

PLEASE NOTE:

- Do not mail any 2011 DSA Pledges to the PO Box that we use for processing DSA pledge payments.
- This is our bank’s lockbox and it is not set up to receive new pledges - only individual payments from donors after July 1, 2011.

REPORTING TOTALS TO THE DEVELOPMENT DEPARTMENT

To expedite the reporting of your weekly DSA totals, **PLEASE EMAIL** your totals to Vicci:
vknowlton@DioceseofLansing.org

If you do not have access to email, please telephone your totals to Vicci **(517) 342-2597**

DEADLINES – PLEASE NOTE

The Catholic Times: Thursday, end of business day.

Each year the Diocese of Lansing publishes the weekly parish DSA totals in *The Catholic Times*. Due to the publication deadline for *The Catholic Times*, totals received after the Thursday deadline will be reflected in the following week's issue.

Friday Email Update: Thursday, end of business day.

In order for your parish to be included in the Friday Email Update that goes out to all parishes in the diocese, your weekly totals must be received each **Thursday by end of business day**.

Please be on the look-out for your Friday Email Update every Friday afternoon.

IMPORTANT CONTACT INFORMATION

The Development Department team is here to serve you. We want to help your parish be successful in achieving and exceeding your parish goal this year! Please contact one of our team members when you need assistance with DSA.

- If you have questions regarding address changes, whether or not a donor has made a pledge, or if you sent an incorrect label and need to make a change:
Please contact: **Marian Narodowiec**, *Development Database Manager*.
Email: **Mnarodowiec@DioceseofLansing.org** - or phone: **(517) 342-2461**
- If you need additional DSA supplies- labels, envelopes, transmittal forms:
contact Lisa Weber – Email: **Lweber@DioceseofLansing.org** or phone **(517) 342-2535**
- Email weekly parish DSA totals to: **vknowlton@DioceseofLansing.org**
If you do not have email, phone totals to Vicci **(517)342-2597**
- All other DSA related questions/issues please contact:
Patricia O’Hearn – Email: **Pohearn@DioceseofLansing.org** or phone: **(517) 342-2503**



Diocese of Lansing

Lansing, MI 48933-1122

DEVELOPMENT DEPARTMENT

Email: Development@DioceseofLansing.org

Phone: (517) 342-2503 • Fax: (517) 342-2513

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