



Diocese of Lansing  
**GIFT PROCESSING  
PROCEDURES**

# **DSA GIFT PROCESSING FORMS**

- Pledge Forms
- Transmittal Cards
- Batch Cards
- Payments on Previous Pledges Form
- Transmittal Summary

**CASH OR CHECK PLEDGE FORM\***  
**\* CREDIT CARD/EFT GIFTS, USE OTHER SIDE OF FORM.**

Parish Use Only  
Donor Identification Label

\_\_\_\_Name\_\_\_\_  
Mr/Mrs/Ms      First Name      Spouse Name      Last Name

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Preferred Phone \_\_\_\_\_

Preferred 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.  
☐ May    ☐ June    ☐ July    ☐ August    ☐ September    ☐ October  
☐ November    ☐ December    ☐ January 2020

## CASH OR CHECK PLEDGE FORM\*

\* CREDIT CARD/EFT GIFTS, USE OTHER SIDE OF FORM.

Parish Use Only  
Donor Identification Label

\_\_\_\_ Name \_\_\_\_\_  
Mr/Mrs/Ms      First Name      Spouse Name      Last Name

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Preferred Phone \_\_\_\_\_

Preferred 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.

☐ May   ☐ June   ☐ July   ☐ August   ☐ September   ☐ October  
☐ November   ☐ December   ☐ January 2020

## CASH OR CHECK PLEDGE FORM\*

\* CREDIT CARD/EFT GIFTS, USE OTHER SIDE OF FORM.

\_\_\_\_\_  
Name **ANONYMOUS**  
Mr/Mrs/Ms First Name Spouse Name Last Name

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Preferred Phone \_\_\_\_\_

Preferred Email \_\_\_\_\_

Please credit my gift to \_\_\_\_\_  
Parish Name Parish City

Parish Use Only  
Donor Identification Label

☒ Cash Gift

☐ Check (Payable to: Your Parish Name/DSA)

Total Pledge Amount \$ \_\_\_\_\_

Amount Paid Now \$ \_\_\_\_\_

Total Pledge Balance \$ **-0-**

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

☐ May ☐ June ☐ July ☐ August ☐ September ☐ October  
☐ November ☐ December ☐ January 2020

CREDIT CARD/EFT PLEDGE FORM

Name \_\_\_\_\_  
Mr/Mrs/Ms      First Name      Spouse Name      Last Name

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Preferred Phone \_\_\_\_\_

Preferred Email \_\_\_\_\_

Please credit my gift to \_\_\_\_\_  
Parish Name      Parish City

Parish Use Only  
Donor Identification Label

Total Pledge Amount \$ \_\_\_\_\_

Amount Paid Now      \$ \_\_\_\_\_ (Cash or Check only)

Total Pledge Balance \$ \_\_\_\_\_

I am planning to go online to fulfill my pledge balance via:

☐ Credit Card      ☐ EFT

If you wish to pay by Credit Card or to have funds automatically withdrawn from a bank account (EFT), please complete this pledge card to assure your gift is added to your parish pledge total. We will use your email address to send you a link to our secure giving page where you may complete your gift and select your terms of payment. **The gift page may be accessed by clicking the “Make a Gift” tab at [www.dioceseoflansing.org](http://www.dioceseoflansing.org).**

CREDIT CARD/EFT PLEDGE FORM

Name

Mr/Mrs/MsFirst NameSpouse NameLast Name

Address

City/State/Zip

Preferred Phone

Preferred Email

Please credit my gift to

Parish NameParish City

Parish Use Only  
Donor Identification Label

Total Pledge Amount

\$

Amount Paid Now

\$

(Cash or Check only)

Total Pledge Balance

\$

I am planning to go online to fulfill my pledge balance via:

☐ Credit Card

☐ EFT

If you wish to pay by Credit Card or to have funds automatically withdrawn from a bank account (EFT), please complete this pledge card to assure your gift is added to your parish pledge total. We will use your email address to send you a link to our secure giving page where you may complete your gift and select your terms of payment. The gift page may be accessed by clicking the “Make a Gift” tab at [www.dioceseoflansing.org](http://www.dioceseoflansing.org).

1014569

Mr. and Mrs. James Doe

~~1234 Main Street~~ 4567 Gibson Drive

Lansing, MI ~~48933~~ 48934



# **SORTING THE BATCH**

Sort all gift/pledge forms into the following categories:

- Gifts Paid in Full – Cash or Check
- Pledges – Cash or Check WITH DOWN PAYMENT
- Pledges – Cash or Check WITH NO DOWN PAYMENT
  
- Pledges – Credit Card or EFT WITH NO DOWN PAYMENT
- Pledges – Credit Card or EFT  
WITH DOWN PAYMENT BY CASH OR CHECK ONLY
  
- Payments on Previous Pledges – Cash or Check Only

Not every batch will have gifts in each category.



## PARISH TRANSMITTAL CARD

**GIFTS PAID IN FULL - CASH OR CHECK**

Diocesan Use Only

BATCH # \_\_\_\_\_

TOTAL # OF GIFTS \_\_\_\_\_



## PARISH TRANSMITTAL CARD

**PLEDGES - CASH OR CHECK  
WITH DOWN PAYMENT**

Diocesan Use Only

BATCH # \_\_\_\_\_

TOTAL # OF GIFTS \_\_\_\_\_



## PARISH TRANSMITTAL CARD

**PLEDGES - CASH OR CHECK  
WITH NO DOWN PAYMENT**

Diocesan Use Only

BATCH # \_\_\_\_\_

TOTAL # OF GIFTS \_\_\_\_\_



## PARISH TRANSMITTAL CARD

**PLEDGES - CREDIT CARD OR EFT  
WITH NO DOWN PAYMENT**

Diocesan Use Only

BATCH # \_\_\_\_\_

TOTAL # OF GIFTS \_\_\_\_\_



## PARISH TRANSMITTAL CARD

**PLEDGES - CREDIT CARD OR EFT  
WITH DOWN PAYMENT BY CASH OR CHECK ONLY**

Diocesan Use Only

BATCH # \_\_\_\_\_

TOTAL # OF GIFTS \_\_\_\_\_

**CORRECT I.D.**

**NEW  
PARISHIONERS**

**ADDRESS  
CHANGE**

**GIFTS FOR  
OTHER PARISHES**

**DECLINED  
DECEASED**

Parish number: \_\_\_\_\_ Parish name: \_\_\_\_\_

Report number: \_\_\_\_\_ Report date: \_\_\_\_\_

[illegible]**TOTAL CASH/CHECKS**

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## TRANSMITTAL SUMMARY

Diocesan Use Only

BATCH # \_\_\_\_\_  
TOTAL # OF GIFTS \_\_\_\_\_  
AMOUNT PLEDGED \$ \_\_\_\_\_  
AMOUNT ENCLOSED \$ \_\_\_\_\_

DATE \_\_\_\_\_

PARISH # \_\_\_\_\_

PARISH NAME \_\_\_\_\_

PARISH CITY \_\_\_\_\_

CONTACT PERSON \_\_\_\_\_

DAYTIME PHONE \_\_\_\_\_

### CASH OR CHECK

# CARDS

AMT. PLEDGED

AMT. PAID NOW

GIFTS PAID IN FULL — CASH OR CHECK

# 

\$ 

\$ \_\_\_\_\_

PLEDGES - CASH OR CHECK  
WITH DOWN PAYMENT

# 

\$ 

\$ \_\_\_\_\_

PLEDGES - CASH OR CHECK  
WITH NO DOWN PAYMENT

# 

\$ 

### CREDIT CARD OR EFT

PLEDGES - CREDIT CARD OR EFT  
WITH NO DOWN PAYMENT

# 

\$ 

PLEDGES - CREDIT CARD OR EFT  
WITH DOWN PAYMENT BY CASH OR CHECK ONLY

# 

\$ 

\$ \_\_\_\_\_

### PAYMENTS ON PREVIOUS PLEDGES

CASH OR CHECK ONLY



\$ \_\_\_\_\_

TOTAL AMOUNT PLEDGED

# \_\_\_\_\_

\$ \_\_\_\_\_

TOTAL AMOUNT PAID NOW

\$ \_\_\_\_\_

TOTAL AMOUNT ENCLOSED \$ \_\_\_\_\_ Parish Check # \_\_\_\_\_

**The total amount paid now and the total amount enclosed must be the same.**

- Total Number of Gifts for Other Parishes # \_\_\_\_\_ Total Amount Paid \$ \_\_\_\_\_
- Please do not add gifts for other parishes & cash paid for other parishes in with your above totals
- Enter these items — only on the two blank lines in this box.



## TRANSMITTAL SUMMARY

Diocesan Use Only

BATCH # \_\_\_\_\_

TOTAL # OF GIFTS \_\_\_\_\_

AMOUNT PLEDGED \$ \_\_\_\_\_

AMOUNT ENCLOSED \$ \_\_\_\_\_

DATE \_\_\_\_\_

PARISH # \_\_\_\_\_

PARISH NAME \_\_\_\_\_

PARISH CITY \_\_\_\_\_

CONTACT PERSON \_\_\_\_\_

DAYTIME PHONE \_\_\_\_\_

### CASH OR CHECK

GIFTS PAID IN FULL — CASH OR CHECK

# CARDS

AMT. PLEDGED

AMT. PAID NOW

# \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_ ✓

PLEDGES - CASH OR CHECK  
WITH DOWN PAYMENT

# \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_ ✓

PLEDGES - CASH OR CHECK  
WITH NO DOWN PAYMENT

# \_\_\_\_\_

\$ \_\_\_\_\_

### CREDIT CARD OR EFT

PLEDGES - CREDIT CARD OR EFT  
WITH NO DOWN PAYMENT

# \_\_\_\_\_

\$ \_\_\_\_\_

PLEDGES - CREDIT CARD OR EFT  
WITH DOWN PAYMENT BY CASH OR CHECK ONLY

# \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_ ✓

### PAYMENTS ON PREVIOUS PLEDGES

CASH OR CHECK ONLY

\$ \_\_\_\_\_ ✓

TOTAL AMOUNT PLEDGED

# \_\_\_\_\_

\$ \_\_\_\_\_

TOTAL AMOUNT PAID NOW

TOTAL AMOUNT ENCLOSED \$ \_\_\_\_\_ Parish Check # \_\_\_\_\_ X

The total amount paid now and the total amount enclosed must be the same.

- Total Number of Gifts for Other Parishes # \_\_\_\_\_ Total Amount Paid \$ \_\_\_\_\_
- Please do not add gifts for other parishes & cash paid for other parishes in with your above totals
- Enter these items — only on the two blank lines in this box.

# MAILING BATCHES TO THE CATHOLIC FOUNDATION

Please check the following before mailing batches to  
The Catholic Foundation:

All gift/pledge forms are sorted into the proper categories and placed into bundles.

Each bundle has the appropriate **TRANSMITTAL CARD** on top of bundle.

Each bundle is further sorted and separated by the colored **BATCH CARD** sub-categories.

All gift/pledge forms in each category or sub-category are sorted in alphabetical order by donor's last name.



# MAILING BATCHES TO THE CATHOLIC FOUNDATION

Please check the following before mailing batches to  
The Catholic Foundation:

KEEP THE TOP SHEET of each **TRANSMITTAL CARD** and  
**TRANSMITTAL SUMMARY SHEET** at the parish.

ATTACH THE BOTTOM SHEET of each **TRANSMITTAL CARD** to the  
appropriate bundle of gift/pledge forms, along with the proper colored  
**BATCH CARDS.**

INCLUDE THE BOTTOM SHEET of the **TRANSMITTAL SUMMARY  
SHEET** with your batch.

INCLUDE THE BOTTOM SHEET of the **PAYMENT ON PREVIOUS  
PLEDGES FORM**, if you received any - you should keep the top sheet  
of the form.

# MAILING BATCHES TO THE CATHOLIC FOUNDATION

Please check the following before mailing batches to  
The Catholic Foundation:

DO NOT ENCLOSE OR MAIL ANY CASH OR CHECKS FROM YOUR PARISHONERS. Deposit all DSA cash and checks received from your parishioners to a parish account, then make a check payable to The Catholic Foundation in the sum of the amount of DSA gifts deposited.

Your batch should be mailed, along with your parish check made payable to The Catholic Foundation, in the DSA **TRANSMITTAL ENVELOPE**.

Gifts received for other parishes should be sent directly to The Catholic Foundation. These are reported in the highlighted section on the bottom of the Transmittal Summary and are not included in your parish totals.

# WEEKLY DSA REPORTS

You do not need to telephone, fax or email weekly DSA totals to the diocese.

In the interest of accuracy, we will publish parish totals **after** batches are received in the mail and reconciled at the diocese.

This process will greatly diminish the chance of reporting inaccurate weekly totals.

# **WEEKLY DSA REPORTS**

## **Friday Email Update to Parishes:**

The Diocese of Lansing will send an email to parishes each Friday reporting parish DSA totals.

# IMPORTANT CONTACT INFORMATION

The Catholic Foundation team is here to serve you. We want your parish to be successful in meeting and exceeding your parish goal this year. Please contact one of our team members if you have questions or need assistance with DSA.

If you have questions regarding address changes, whether or not a donor has made a pledge, or for donors needing assistance with Credit Card or EFT gifts, please contact: **Donor Services**

Email: [donorservices@dioceseoflansing.org](mailto:donorservices@dioceseoflansing.org) • Telephone: 517.342.2590

All other DSA related questions/issues, please contact:

**Matt Hufnagel**, *Vice President of Development*

Email: [mhufnagel@dioceseoflansing.org](mailto:mhufnagel@dioceseoflansing.org) • Telephone: 517.342.2503



*Thank You!*