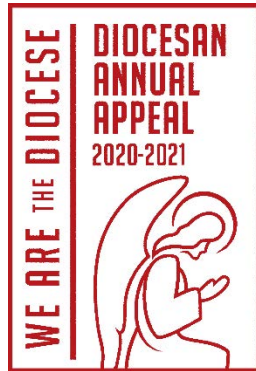


**2020 - 2021
DIOCESE OF LA CROSSE
DIOCESAN ANNUAL APPEAL
PARISH MANUAL**

**HIS
CHURCH**
**IS STILL HERE + IT STILL PROVIDES
IS YOU AND ME**



STEWARDSHIP & DEVELOPMENT OFFICE
JEFF REITER, DIRECTOR OF STEWARDSHIP & DEVELOPMENT
SARAH KOMPERUD, ADMINISTRATIVE ASSISTANT

TABLE OF CONTENTS

A Letter From the Director.....	4
Mission Statement of the Diocesan Annual Appeal	5
The Four Phases of an Appeal.....	6
Phase 1: Promote the Appeal	6
Stewardship Sunday	6
Office of Stewardship and Development Efforts:	8
Phase 2: Obtain the Pledge.....	9
Commitment Sunday	9
Office for Stewardship and Development Efforts:	11
Phase 3: Follow-up.....	12
Amen Sunday.....	12
In Pew Ask	13
Office for Stewardship and Development Efforts:	14
Telephone Follow-Up	15
Organization Procedures:.....	15
Phase 4: Thank the Donors	18
Office of Stewardship and Development Efforts:	18
Roles and Responsibilities.....	19
Leadership Development.....	19
Pastor, Associate Pastor, & Pastoral Associate	19
Parish Appeal Chairperson	19
Appeal Secretary	20
Volunteers	20
Office for Stewardship and Development.....	21
Public Relations:.....	22
Using Newsletters, Bulletins & Announcements.....	22
Ambo:.....	22
Bulletin Announcements:.....	22
Monthly Newsletters:.....	22
Visual Aids:	22
Parish Targets.....	24
Target Formula	24
Parish Rebates	24
Parish Responsibility.....	25

Timetable.....	26
Kickoff.....	26
Reports and Forms.....	28
GivingTrend.....	29
Direct Mail Pre-Printed.....	30
“In-Pew” Pledge Cards.....	31
Parish Information Form.....	32
Processing of Gifts.....	32
Electronic Payment Options.....	33
Sustaining Gift.....	33
Electronic Funds Transfer (EFT).....	34
Credit Card Payment Option.....	34

A LETTER FROM THE DIRECTOR

Dear Parish Appeal Leader,

May Christ give you peace!

Joseph, Patron of our Diocese, pray for us!"

It has become cliché, but we are in unprecedented times. Despite efforts to contain a virus with lockdowns and distancing ourselves from each other, the Covid-19 virus has contributed to hundreds of thousands of deaths. As I write this, a presidential election divides our country. All sides cater to identity politics, which separates us and separates us from our common good ideals.

The Appeal is one way we invite others regardless of race, creed, or political alliance to unite together in Christ's cross to further His mission to baptize all nations, to share the joy of the Gospel, and find the healing and redemptive mercy of His charity. We are not to judge, but to invite, unite, not divide, that is what the 38 different ministries supported by the Diocesan Annual Appeal does every day.

Your leadership in the Appeal will require you to use your God-given time, talents to encourage others to share just one of their treasures, financial support, but hopefully, it will inspire and evangelize other to share their time and talents with their parish, diocese, the global Church, and other communities as well

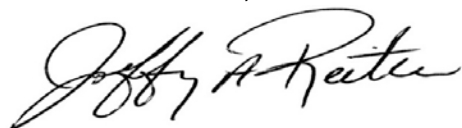
This manual is a guide for your parish to assist you through the Diocesan Annual Appeal process. **Please read this manual carefully. While many aspects of the appeal processing have not changed from last year, many valuable lessons and strategies can help you with your efforts.**

Please, direct any inquiries about the Appeal process or how the Office of Stewardship & Development may assist your parish in conducting the Appeal to the following:

Jeff Reiter
Director of Stewardship & Development
608-791-2685 or jreiter@diolc.org

Sarah Komperud
Administrative Assistant
608-791-2653 or skomperud@diolc.org

+Peace and All Good,



Jeff Reiter
Director of Stewardship and Development

P.S. In this year of St. Joseph, please pray to our Diocesan Patron every day! By always praying and working hard, we can be confident that Joseph, the guidance and stewardship model, will bless our efforts and lead our families, our fellow parishioners, and us closer to the Church through the 2018 Diocesan Annual Appeal.

MISSION STATEMENT OF THE DIOCESAN ANNUAL APPEAL

The Diocesan Annual Appeal is the annual effort of our Catholic community of the La Crosse Diocese to respond to the Gospel challenge of Jesus Christ to love one another by contemplating God's blessings in our lives and sharing our gifts to ensure that the vital ministries of the Church receive the financial support necessary. Emboldened by the Holy Spirit and nourished by the Eucharist, we strive to promote sharing the good news of the Gospel and living a life of stewardship in a manner that fund and sustains the mission of our diocese and the wider Church.

We, the Stewards of the Diocesan Annual Appeal, dedicate ourselves to seeking financial and philanthropic gifts, which through Christ's call, inspires His disciples to holiness through the practice of self-giving. Transformed by our baptism, we are Disciples of Christ, sustained in our relationship with Jesus to be stewards of the Good News of His Holy Gospel. As stewards, by following the commandment to "love God and love one another," we serve the Lord by assisting relief for the needs of all God's people and the needs of our community, and by making a significant and positive impact on the lives of our neighbors.

We pray that through the grace of God, the prayers of Mary, our Holy Mother, and St. Joseph, our Patron father, we can continue to steward our gifts for the building of the kingdom of Heaven here on earth.

THE FOUR PHASES OF AN APPEAL

PHASE 1: PROMOTE
PHASE 2: OBTAIN

PHASE 3: FOLLOW-UP
PHASE 4: THANK SUPPORTERS

PHASE 1: PROMOTE THE APPEAL

STEWARDSHIP SUNDAY

The purpose of Stewardship Sunday is to announce the Diocesan Annual Appeal and your parish efforts. This Sunday is also the appropriate time to promote your parish target for the Appeal and what project you will fund with your rebate. Use this Sunday to kick off the campaign in your parish. Establish how the funds from the Appeal meet needs in the parish, diocese, and the wider Church. Set the context of a shared community across the diocese. Help parishioners understand how the parish will use the money. Show the Annual Appeal video. Make them aware they may have received or will be receiving the mailing the following week, asking for their financial participation.

Here are several best practices to help you promote the Appeal in your parish. Advancing the Appeal positively, especially before and during Appeal Sundays, will show your parishioners that the Appeal is an integral part of parish life while strengthening our unity in the greater Church.

Studies indicate that a person has to hear the same message seven times before beginning to process and trust it. Commitment, clarity, and consistency in all communication are necessary.

BEST PRACTICES

- Actively emphasize and engage the pastor's leadership support and participation in the Appeal. Set an example of generosity. As the chief advocate of the Appeal, the pastor is essential to presenting the Appeal positively and enthusiastically. Parishioners need to know that the pastor gave and that making the parish target is a high priority.
 - Use homily messages – link the liturgical celebration to the mission of the Appeal and provide the spirituality of stewardship.
 - Send Letters from the Pastor
 - Public Gratitude – Thank the donors, and volunteers, publicly
 - Speak honestly and enthusiastically about how the Appeal's funds benefit the parish and the wider Church. Mention:
 1. How your parish used grants or funding received through the Appeal.
 2. How parish used the rebates received previously from earlier Appeals.
 3. How the services provided by the Curial offices helps to support the parish.
 4. Explain vividly how the Appeal affects real lives.
- Show the Appeal Video at Mass, council and committee meetings, school assemblies, and formation classes; link it on your parish website. The video is a demonstration of how the gifts to the Diocesan Annual Appel works beyond your parish.

- Can each person in Church see the screen? Do you need to have more than one screen throughout the Church?
 - Does the audio work? Will everyone be able to hear the video? Is it possible to connect the audio through the Church's sound system? Make sure that you do a test run before Mass!
 - Will the lighting be a problem? Sometimes natural light can make it difficult to see a T.V. screen. Is there another option that you could use (i.e., a larger screen or the several televisions throughout the Church)?
 - Is there a parishioner that works for an electronics store or has knowledge of video/television equipment? Is there an electronics store that might donate the use of a large screen? Use your resources!
 - Consider showing the video on a T.V. in the lobby of your Church as parishioners walk in and during social events after Mass.
- Witness Talks invite speakers to give firsthand testimony of the impact of the Appeal. Keep the presentations pithy and brief.
 - The pastor or designated layperson presents them.
 - Encourage parishioners to reflect on others' needs and their ability to pledge to the Diocesan Annual Appeal in preparation for Commitment Sunday.
 - Briefly explain the process for pledging. Emphasize that a pledge can be payable over a period concluding June 30th.
 - Publish Announcements – use your bulletin and school newsletters to promote the Appeal. Samples are on the DAA website. Please consider tweaking the message to fit the culture and messaging needs of your parish.
 - Use Social Media – use MyParish App to broadcast messages. Tweet on your Twitter, and post on your Facebook pages, Instagram's accounts. Check the Curia's Communication department if you have any questions.
 - Utilize the marketing materials – Make use of the posters, banners, brochures, and case statements.

In Phase 1, we focus on promotion to engage 100% participation of all parishioners. The goal is to encourage every Catholic household to make a once-a-year stewardship gift to support the Diocesan works and ministries. This phase seeks not to have a minimum household gift between the Appeal's beginnings through its conclusion on June 30th but to encourage everyone to their best abilities.

Materials supplied by the Stewardship & Development Office:

- Posters
- Video
- Blank pledge cards
- Initial mailing including pre-addressed pledge cards, brochures, a parish return envelope
- Special envelopes to send payments to The Office for Stewardship and Development
- This instruction manual. (Also, on the website www.dioc.org/appeal/)

Office of Stewardship and Development Efforts:

In the weeks leading up to the Appeal weekends, the S&D office is working to raise awareness of the Appeal through a number of channels.

Catholic Life magazine will feature the ministries and good works that are possible because of the gifts to the Appeal and encourage people to make a gift.

Bishop Callahan sends a personal letter to all Catholic households, thanking active donors for their past support and encouraged to continue their faithful stewardship, inviting inactive donors to make a commitment. Pastors are encouraged to submit a letter of their own, as well. A custom coded pledge card is included in the mailing.

Word-of-mouth marketing is the best and most cost-effective way to spread the good news of those helped by the Appeal. DAA marketing efforts are limited to keep costs low, so we rely on parish volunteers to tell their stories and personally invite participation.

Diocesan Communication Office will enhance the Appeal's Social Media by out-reaching, starting before the full launch to increase our presence; Including, the use of Twitter, Facebook, MyParish

PHASE 2: OBTAIN THE PLEDGE

The first pillar of stewardship is **Hospitality**- warmly inviting and lovingly welcoming. If we do not ask the people of God to pray with us, and we do not help them feel welcomed upon arrival, this drastically reduces the chance of them coming back or even staying to pray with us. If we are not praying together, how are we staying together? **Prayer** being the second pillar of Stewardship, all of us must develop a deeper relationship with Christ, in which we will engage a life of more in-depth inquiry and contemplation. Without a relationship with Christ, **Formation**, the third pillar of stewardship, does not happen. Without formation, an individual does not discern and accept the recognition of their need to serve. The pinnacle of stewardship is **Service** to others, and it is the fourth pillar of stewardship. Gratitude is the basis of Christian Stewardship. Christian Stewardship is our **Time** invested into our God-given **Talents**, which multiplies our **Treasures**: that is, our skills, experience, and wealth so that we may offer to and serve God, our Creator and the Provider of all our gifts, a grateful and humble return.

COMMITMENT SUNDAY

The purpose of Commitment Sunday is to provide a compelling opportunity for parishioners to make their yearly commitment to their Diocese and universal Church by completing the Diocesan Annual Appeal pledge card. Pastors should speak about the Appeal during Mass. If there is an after-Mass event, make pledge cards available for parishioners to complete.

Deliver the “ask” on this Sunday via homily and lay testimony. Recap the needs and stories from the prior week, make a direct request for prayers, and participation in this year’s Appeal and announce the parish target. Explain what your parish will do with its rebate. Spend time teaching how to give, including the ability to give through monthly installments.

BEST PRACTICES

1. During Homilies and Witness talks
 - a. The Diocesan Annual Appeal is an opportunity to give in proportion to the many blessings received from God. Do not apologize for the Appeal; instead, show that this is their opportunity to practice stewardship and participate in the broader Church.
 - b. Highlight the benefits of your parish reaching your Appeal target and achieving a rebate.
 - c. Be enthusiastic and speak with conviction.
 - d. Encourage 100% participation by the parish. (A \$1 or \$0 pledge is better than no commitment.)
 - e. Give facts and concrete examples of how the diocese provides support for your parish. People are more likely to give if they see a connection between the parish and the diocese.
 - f. Make brochures, blank pledge cards, and pencils available to all present. Encourage parishioners, who have not already done so, to support the Appeal by completing pledge cards and turning them into the collection. **Emphasize that if parishioners have already pledged, ask them to fill out a card ONLY IF they are making an additional pledge; they then need to indicate on the pledge card that it is an additional pledge.** (Pledge cards from parishioners that already pledged a gift, and are not making a new pledge, causes pledges to be recorded twice, resulting in double pledge reminders, which frustrates and upsets, all involved especially the parishioners.)

- g. Tell parishioners they do not have to make an initial payment; that reminder statements, if they choose not to opt-out, are sent to them monthly.
- h. Promote the idea of pledging over a period since it enables people to give more than they could with a one-time gift. (All payment postmarked before June 30th will be included in the current year's Appeal.)
- i. Communicate the convenience of paying pledges (1) by credit card on the Diocesan website, (2) by credit card at the Diocesan Annual Appeal office, or (3) by Automatic Checking Payment. Encouraging sustainable giving, year-round support, through electronic means, is the best way to invest.
- j. Volunteers should be present to help distribute pledge cards, answer questions, and collect pledge cards and payments.

2. After-Mass

- a. Choose a convenient place for the event and provide light refreshments (if appropriate).
 - b. Brochures and pledge cards should be arranged on tables with pens and envelopes for parishioners to pledge. **Due to COVID, protocols consider ways to make sure these can be provided without fear.**
 - c. Volunteers should be present to help distribute pledge cards, answer questions, and collect pledge cards and payments.
 - d. Explain the procedure briefly for filling out the pledge card.
- Have "in-pew" pledge cards available. Use the "in-pew" pledge card for bulletin announcements. Use cards provided by the Office for Stewardship and Development. These have special 2D scan coding that allows for faster, more efficient, and more accurate processing. **Gifts received without the correct 2D code can expect delays of up to two weeks or more processing.**
 - Setup a Stewardship Table: Set up a station that is convenient and accessible. Make sure to staff it with trained, friendly, and engaging people, and have plenty of pens available. Remind people to fill out the card completely. Do not be afraid to include parish service opportunities. The three elements of Stewardship is Time, Talent, and Treasure.
 - Return pledges and gifts immediately – Honor your supporters. Do not create delays in processing their donation. Every gift is a sacrifice that could go elsewhere acknowledge it as such. Immediate forwarding of the gifts to the Office for Stewardship and Development ensures quick and timely acknowledgments of their donations. See Gift Processing for more information
 - Encourage 100% participation.
 - Those who have previously given to the Appeal are most likely to give again – do not be shy about asking.
 - No gift is too small or too large.
 - When a parishioner makes a thoughtful response to the Appeal, even a \$0 pledge, it is a sign of good parish membership.
 - Encourage parishioners to return the Appeal pledge cards as a way to conduct an annual parish census. Parishes that have used this approach have a very high level of giving.

- Pledged Giving encourages larger gifts and allows parishioners to budget their support monthly, concluding June 30th. Installment payments on pledges throughout the year, whether by check, direct electronic payment from a parishioner's checking account, or credit card (VISA, MasterCard, American Express or Discover) encourage more sacrificial giving. REMINDER: A pledge to the Diocesan Annual Appeal is not a legal debt, and a donor may cancel at any time by notifying, in writing, the Office for Stewardship and Development.

Office for Stewardship and Development Efforts:

The Office for Stewardship and Development mails to all registered parishioners and other supporters from the previous year, a brochure, a letter from Bishop, and a personalized pledge card with last year's gift information and a suggest gift amount for this year.

The Office for Stewardship and Development will publish an ad in Diocesan Appeals Annual Report in the Sept/October *Catholic Life* magazine.

The Office for Stewardship and Development will be sending timely acknowledgments of all gifts and pledges. We will also begin sending out reminders for early supporters. We will continue to send reminders on a monthly basis until fulfilment of the pledge or through June 2020 whichever comes first.

PHASE 3: FOLLOW-UP

Stewardship is a way of life. Conceptually, Christian Stewardship progress through four stages. These four stages are stages of maturation of our Christian life. These four stages or as they are better known as the four ships of stewardship. These are Leadership, Relationship, Discipleship, and Stewardship. **Leadership** is responding to the call by Christ to follow, leading us into closer communion with Him. This communion is the second ship, **Relationship**. A defining character of Relationship is the developing prayer life. As we discern through prayer and formation, we come into the third ship, **Discipleship**. Discipleship is the active and deliberative following of our Christ Jesus, not asking what would Jesus do, but asking what does Jesus do. Almsgiving is the exemplification of Discipleship. A disciple gives of their Time, Talent, and Treasure generously, and often. Discipleship is the necessary precursor of Christian **Stewardship**. Stewardship is our fourth ship; it is the disciple's full maturation. Christian Stewardship sacrificially gives of their Time, Talent, and Treasures. The hallmark of a Christian Steward is their Fasting. Fasting from conveniences, treasures, and personal and worldly comforts to give back even more of their Time, Talent, and Treasures.

AMEN SUNDAY

Amen Sunday is useful in reminding mass-attending parishioners of their needed support. This in-pew process will solicit parishioners that have not registered with the parish and have not received the Appeal mailing. Amen Sunday is an excellent opportunity to ask a donor if they would like to become a registered parishioner. Many in the pew do not understand or even know of the need to register.

The purpose of Amen Sunday is to generate gifts from parishioners who have not pledged to the Appeal. Encourage parishioners to write something, even zero, on the pledge card.

Following this in-pew solicitation process, if followed meticulously, will increase your chances of meeting or exceeding your goal. Even in the most mature of appeals, only about 20% of parish households donate in the first mailing. Even though parish members will receive the mailing, many will not respond to it because they are not interested in giving, and many simply ignore direct mail appeals. Also, others are not registered at their parish and, therefore, do not receive the mailing.

It is essential to do the full in-pew process as directed below because it will succeed in obtaining pledges from more families than just inviting them to take pledge cards, envelop them home, or stop at a table. The in-pew process assures that each parishioner who attends Mass understands the invitation they are considering and encourages pledging.

Best Practices

- Ask donors who gave last year – if a person gave last year, but has not yet donated this year, they are most likely to respond. Focus your energy here first to make the best use of your time. A report to help identify these donors called the LYBUNTS (Last Year But Unfortunately Not This year) report, is available through a GivingTrend online reporting system.
- Next, focus on donors in recent years – if a person has contributed to the Appeal in the past few years, but not last year or this one, reach out to re-establish a connection and ask for a gift this year. An SYBUNT (Some Year But Unfortunately Not This year) report is available on

the GivingTrend online reporting system. Again, this helps to make sure you make the best use of your time. A report to help identify these donors, called the SYBUNTS report, is available through the online reporting system.

- Finally, reach out to everyone “In Pew Ask” – sometimes a person might not be registered at a parish but may attend Mass regularly or be active in other facets of parish life. Invite everyone to make a gift and take the opportunity to share the stories of people helped by the ministries, schools, and apostolates supported by the Appeal.
- Send follow-up mailings – use the sample LYBUNT and SYBUNT letters provided in the on the DAA website.
- Make phone calls to those who have given in the past but not yet this year
- Share the printed materials and the video to help motivate people to make a gift as you conduct the follow-up.
- Utilize the online reporting system – use GivingTrend, the online reporting system to review reports, see how close you are to your goals, and generate a list of donors who have not yet made a gift to this year’s Appeal.
- Be Persistent - continue promoting the Appeal, follow up with donors, and let us know if we can help. Keep the Appeal before the people with church bulletins, newsletters, announcements, or websites: Use clip art to highlight the uses of the fund the Appeal generates.
- Track Progress toward the target (target amount, pledge, and cash total, the number of or percentage of parishioners pledging).

In Pew Ask

1. Provide brochures, blank pledge cards, envelopes, and pens in the pews or hand them out at Mass.
2. Volunteers should be present to help answer questions and collect pledge cards and payments.
3. Explain the procedure briefly for filling out the pledge card.
4. The pastor should update parishioners on the progress of the Diocesan Annual Appeal.
5. Inform parishioners that no gift is too small and that the parish goal is to have 100% participation.
6. Remind parishioners of the benefits of your parish are achieving the target and receiving a rebate. Talk about the project you have planned to fund with the rebate.
7. Ask parishioners to write the following on their pledge card:
 - a. If they are unable to commit – request a prayer pledge
 - b. If they would like to pledge - the amount of pledge

8. If parishioners have already pledged, ask them not to complete a card, unless they are making an additional pledge, they then need to indicate on the pledge card that it is an additional pledge. Pledge cards from parishioners who already pledged and are not making a new pledge causes double pledge records, resulting in upset parishioners.
9. Ask the volunteers to collect the cards.
10. Volunteers should sort the cards after Mass.
11. Make a note of any parishioners who are unable to donate. The Office for Stewardship and Development will record the zero pledges, so they do not receive follow-up phone calls or letters.

Office for Stewardship and Development Efforts:

The office for Stewardship and Development will send out acknowledgement for all pledges. We also send thank you for all onetime gifts, the first payments on pledges and the final and fulfilling payment of a pledge.

Giving Tuesday (First Tuesday after Thanksgiving) - a mailing encourages pledge fulfilment and a LYBUNT ask is sent out for the calendar and tax year advantage.

Holy Week - a SYBUNT mailing is mailed to any past supports who have not yet supported the mission yet this year.

June 1st - a mailing to those SYBUNTS and those who have Not yet Given for parishes at 90% or less of goal or are short of goal by more than \$1,000 are given one more opportunity to participate for the year.

TELEPHONE FOLLOW-UP

After a parish has Amen Sunday, consider conducting a phone follow-up of parishioners who have not responded to the Diocesan Annual Appeal.

Organization Procedures:

1. Review the list of parishioners who have not pledged to the Diocesan Annual Appeal. The goal is to increase participation. Your highest success rate will be among parishioners who pledged last year but have not done so this year. The next highest success rate will be among parishioners who have given something in the past three years. Try to reach as many of these parishioners as possible.
2. Recruit a telephone-calling team. There should be enough volunteers for 20-30 calls per person. Ideal telephone callers have an outgoing personality and are comfortable making calls.
3. If possible, select a central location with more than one phone line for calling. A central location will provide volunteer support and affirmation. Have resource people available to answer donor questions. If this is not possible, allow the volunteers to do the calling from their own homes.
4. Set a deadline for completing the work. Callers need to return the names and notes to the parish by a specified date.
5. If practical, let the volunteers select whom they will call.
6. Volunteers making the phone calls should be given pledge cards with the name and phone number of the parishioner they are calling already prefilled. Volunteers must call only those parishioners assigned to them. If a donor does not wish to make a gift, write that on the pledge card and turn it in with the other pledge cards, we track these, and it helps us in future solicitations.
7. Before beginning to make calls, the callers should have a brief training session and read the Case Statement so they can answer questions about the Appeal's allocation of funds.
8. Practice using the sample telephone script and suggestions on the following page.
9. Show consideration by not calling during early or late hours or during meal times (ideally, call between 7:00 p.m. and 8:30 p.m.).
10. Announce at the preceding Mass that there will be a telephone follow-up for the Appeal. An announcement at Mass will prepare parishioners for the calls. Also, remind parishioners that to avoid a call, they can make their pledge to the Diocesan Annual Appeal after Mass that day. Have blank pledge cards and pens available.
11. Before a call, Prayer is the most effective action that a member of the telephone calling team can take.

Telephone Procedure:

1. Introduce yourself and tell them you call for Father (PASTOR'S NAME) from (NAME OF PARISH) regarding the Diocesan Annual Appeal. Be sure to ask for the particular person named on your card.
2. If they are not home, ask for the best time to call back. Some homes may require several callbacks, so don't be discouraged. Do not leave a message; 99% of the time, the call will not be returned.
3. Remember that, in most cases, the parishioners will already be aware of the Diocesan Annual Appeal from previous years. Some people will be pleasantly surprised that they can pledge over the phone, and many will be grateful to the volunteer for calling with a friendly reminder. Tell them, "to reach our parish goal; Father hopes you will consider pledging."
4. If they say they misplaced, lost, or did not receive a pledge card, tell them, "I have a pledge card in front of me. I can handle the details over the phone. Would you like to pledge?"
5. If they seem a little reluctant, tell them, "The parish receives all monies over the parish target of \$_____. Your gift will help fund _____." Try to convince the people without the pressure to pledge to the Diocesan Annual Appeal. Be mindful that much commercial hard-sell goes on over the phone and that some people are annoyed at any invasion of their privacy.
6. Often a husband or wife will say they have to speak with their spouse before committing. Ask when you can call back for their decision. It is essential to set a specific time and date for the follow-up phone call and to be sure to call back at that point.
7. Taking good notes will help you make callbacks. Include in your notes: date of the call, whom you spoke to, date and Time to call back, brief details of the conversation.
8. If the person wants to pledge, say:

**(For those who did not pledge last year), "We are asking for an average gift of ____ per family. What amount would you like to pledge?" (Obtain a specific amount.)*

**(For those who pledged last year), "Your pledge last year was \$_____, and we are asking parishioners to increase their pledge by a minimum of 10%. What can I put you down for this year?" (Obtain a specific amount.)*
9. Thank the donor and say, "You can mail your gift to the parish office, drop it in the collection next Sunday, or the Office for Stewardship and Development Office will send you a reminder at the beginning of next month. Please make the check payable to the Diocese of La Crosse."

THINGS TO REMEMBER

- **DECEMBER 31ST:** The Office for Stewardship and Development for tax purposes will only accept payments for the current tax year, **postmarked** on or before December 31st. Any payment postmarked after December 31st that we receive in our office is the next calendar year's activity. **In adherence to federal and state laws and best accounting practices, we will not backdate gift processing for any reason**

- **JUNE 30TH:** The Diocesan Fiscal Year is July 1st through June 30th. The Diocesan Annual Appeal runs concurrently. That is July 1st through June 30th. We will process gifts based on the postmark's date for adherence to responsible and ethical fiscal management. **In obedience to best accounting practices, we will not backdate gift processing for any reason.**

- **If your parish wishes to pay the target balance, you have two options:**
 1. Send the payments to our office before June 30th. Any overpayment will come in the form of a rebate.
 2. Receive a bill from the Finance Office (they go out around July 20th) and pay it at that time.

PHASE 4: THANK THE DONORS

“Gratitude is the mother of all virtues,” and we see this in our Holy Mother, the model Steward; how she is grateful for the great things the Lord has done for her. A grateful steward also celebrates the gifts of their community. One does not light a lamp just to put it under a basket. Create opportunities to thank and honor those who have made a gift.

Best Practices

- Say “thank you” often – as people turn in their pledge cards and gifts, let them know you are grateful for those they help through the Appeal.
- Send personalized thank-you notes or calls – invite the pastor to send personal thank-you notes or make telephone calls. Remember to focus not on just the amount but the sacrificialness of the giving. Some may not give much, but their gift may be more of the percentage of their income than those who provide significant dollar amounts.
- Celebrate generosity – incorporate thanksgiving messages that celebrate faithful stewardship into the Prayers of the Faithful and ask the priest to include a “thank you” in his homily.
- Share your success – publish actual statistics and recognition of donors and volunteers in the weekly bulletin.

Office of Stewardship and Development Efforts:

Following the close of the Appeal the S&D office is working to reconcile the final numbers of the Appeal. It will issue the final rebate checks and forward to finance any shortfalls

The Office for Stewardship and Development sends acknowledgment of gratitude, unless donor opts out, for every pledge received, initial pledge payment, all one-time gifts, and when a donor fulfills their pledge. We generate these letters on a weekly basis and mail them to the donor.

We will separate gifts for dollar amount giving levels and the gratitude acknowledgments receive different forms. Remember, we do not know your supports as well as you do, someone may give a more sacrificial gift at a lower dollar level, it is good practice for the parish to acknowledge, the proverbial “widow’s mite.”

Gift Level	Dollar Range		Acknowledgment
Our Lady of Lourdes	\$ 500.00	\$ 999.99	Standard
Saint Stanislaus	\$ 1,000.00	\$ 1,499.99	Standard
Saint Francis of Assisi	\$ 1,500.00	\$ 2,499.99	Standard with Director noted
Saint Joseph	\$ 2,500.00	\$ 4,999.99	Personal letter Director
Miter Society	\$ 5,000.00	\$ 9,999.99	Letter from Bishop
Crozier	\$ 10,000.00		Personal Note from Bishop

ROLES AND RESPONSIBILITIES

LEADERSHIP DEVELOPMENT

All individuals involved in the Diocesan Annual Appeal should attend a Leadership Development session. The Office for Stewardship and Development holds training each year in several locations throughout the Diocese in August to instruct on the purpose and procedures of the Appeal. The day includes a Stewardship discussion, showing the video, and answering any questions that arise. In late July or early August, all parishes receive a registration mailer. Please return the registration form to the Office for Stewardship and Development as soon as possible.

Pastor, Associate Pastor, & Pastoral Associate

Pastors, associate pastors, and pastoral associates lead by their example; instruct and motivate. They are essential to the success of the Diocesan Annual Appeal. Parishioners respond to their pastor's spiritual direction, for example, enthusiasm, leadership, and confidence.

Principle Responsibilities:

1. Gives to the Diocesan Annual Appeal.
2. Attends leadership development.
3. Reads the Appeal materials thoroughly.
4. Positively presents the goals and theme of the Appeal.
5. Selects competent and enthusiastic lay leadership for the Appeal.
6. Assists the Appeal leadership.
7. Encourages parishioners to participate.
8. Guides the Chairperson to form and carry out a plan, ensuring that every parishioner, whether they come to Mass or not, understands the Appeal's value and receives an invitation to participate.
9. Promotes the Appeal positively at parish meetings.
10. Speaks at Mass reporting on progress toward reaching the target and thanking current participants.
11. Meets with the Chairperson on, at least, a monthly basis to review the Diocesan Annual Appeal progress.
12. Initiates follow-up procedures

Parish Appeal Chairperson

The chair should be a well-respected member of the parish community who supports the Diocesan Annual Appeal's goals. In addition to knowing the parish well, the chair should present the Appeal enthusiastically to fellow parishioners.

Principle Responsibilities:

1. Gives to the Diocesan Annual Appeal.
2. Attends Leadership Development workshops
3. Assists the pastor in carrying out the solicitation of parish members.
4. Forms and carries out a plan, ensuring that every parishioner, whether they come to Mass or not, understands the value of the Appeal, and receives an invitation to participate.
5. Enlists and trains volunteers to help carry out personal solicitations.
6. Directs the distribution of Appeal materials.

7. Audits GivingTrend reporting
8. Holds weekly report meetings for the volunteers.
9. Promotes the Appeal positively at parish meetings.
10. Speaks at Mass, along with the pastor, reporting on progress toward reaching the target.
11. Initiates follow-up procedures.

Appeal Secretary

The Appeal Secretary is the Diocesan Annual Appeal coordinator in the parish and is a vital link between the parish and the Stewardship & Development Office. This person must know the parish, capable of keeping accurate records, and enthusiastic about the Appeal.

Principle Responsibilities:

1. Gives to the Diocesan Annual Appeal.
2. Attends leadership development.
3. Reads the Appeal materials thoroughly.
4. Assists the pastor and the Chairperson in carrying out the program of solicitation.
5. Attends all DAA meetings.
6. Maintain parish records.
7. Updates the Google Forms for Parish Contact information. Found via <http://appeal.dioc.org>
8. Contacts the Office for Stewardship and Development with any questions.

Volunteers

Volunteers are the foundation of the Diocesan Annual Appeal at the parish level. They should be knowledgeable about the Appeal's positive impact on parish life so that they can enthusiastically promote it. There should be a minimum of one volunteer for every eight families in the parish.

Principle Responsibilities:

1. Gives to the Diocesan Annual Appeal.
2. Reads the Appeal materials thoroughly.
3. Visits and promotes the Appeal positively to other parishioners.
4. Follows up with households they have contacted in a timely and appropriate manner.
5. Attends weekly report meetings to share their progress and success.
6. Helps distribute materials as necessary, possibly through parish mailings and after-Mass events.
7. Contacts parishioners who have not pledged.
8. Monitor payment towards pledges reminding those with phone calls which fall behind.
9. Reports and turns in all pledges and contributions to the Appeal Secretary.

Office for Stewardship and Development

The Office for Stewardship and Development supports the parish efforts of the Diocesan Annual Appeal. The office should be knowledgeable about the Appeal's impact on parish life, so that individually and as a team, we can enthusiastically promote and support parish efforts by providing training, guides, and best practices.

Principle Responsibilities:

1. The staff gives to the Diocesan Annual Appeal.
2. Reads the Appeal materials thoroughly.
3. Visits and promotes the Appeal positively to others in the Curia, parishes, and public at large
4. Ensures the use of the best source data to the office for mailing and donor correspondence
5. Communicates always with donors, staff, and parishes of issues and opportunities as they develop
6. Distribute materials as necessary, possibly through parish mailings, meet with councils and committees and attend after-Mass events as requested.
7. Ensure timely mailings of acknowledgments and reminders.
8. Develop and distribute compelling and quality promotional materials
9. Educate and promote Stewardship as an encounter with Christ
10. Maintain a high level of parish and donor satisfaction as it pertains to processing reporting of gifts

PUBLIC RELATIONS:

USING NEWSLETTERS, BULLETINS & ANNOUNCEMENTS

Public relations play a vital role in your parish effort's success by using the means available to stimulate donors to pledge their financial support. It is crucial to help the donor connect the Appeal with Church worldwide, the diocese, more directly, your parish, by explaining how the parish will use the funds and how they benefit the common good. Your chances of success improve by following the best practices below.

Ambo:

The pastor or Chairperson of the Diocesan Annual Appeal should make announcements during the months of September, October, and November to keep the parishioners abreast of progress toward reaching their goal. Progress reports are available on GivingTrend, which updates daily during the business week. Make sure to prepare the announcement in advance and in-writing, so they remain uniform and factual, no matter who makes the announcement.

Bulletin Announcements:

Bulletins are an essential way to remind parishioners about the message of the Appeal and of the benefit that it will have to your parish. Consider using bulletins to report progress, thank the parish Appeal leadership, and remind parishioners of your parish's progress and importance reaching its target.

Monthly Newsletters:

A newsletter is a great vehicle to carry the Appeal message in a permanent printed form and continually form our parishioners to Christian Stewardship. Repetition for emphasis is always valid. Studies have shown that we retain only 10% of what we hear, and a person needs to listen to a consistent message seven times before they begin to believe and internalize a message. Therefore, the newsletter provides an opportunity to reinforce the importance of time, talent, and treasure and give recognition to your parish Appeal leaders.

Announcements could include the following:

- Highlight an aspect of the case statement each weekend. Use a real-life example.
- Remind parishioners of the importance a rebate would make by highlighting what it will fund.
- An update on the progress your parish is making toward reaching your target.
- Each week mentions the Appeal in the prayers of the faithful.
- Ask parishioners to pray a Hail Mary for the success of the Appeal.

Visual Aids:

As a constant reminder of the Appeal and its importance to the greater Church and your parish, it is essential that you:

- Display your posters in a prominent location. The Office for Stewardship and Development will have these available at the Diocesan Annual Appeal training workshops. You can order extras through the Office for Stewardship and Development.
- Show the Appeal video many times after the initial showing. Consider placing a small T.V. showing the video in the vestibule or another gathering location of the Church before and after Masses.

- Have brochures, In-Pew pledge cards, envelopes, and pens available at all times.

PARISH TARGETS

Each Parish target is a fair share of the Diocesan Annual Appeal goal. No parish has more than 2.6% of the overall goal as their target. The goal for 2020 - 2021 Diocesan Annual Appeal is \$5,675.035.

Data that is common to every parish determine the parish targets parish size (number of envelope holders who give \$100 or more per year), parish adult envelope income, the amount of money a parish spends on PK-12 Catholic school education separate from tuition income, and the number of students enrolled in Catholic Schools. The Annual Report to the Bishop is the source document for the Diocesan Annual Appeal target formula.

TARGET FORMULA

Variable A:

Line 16 (401): The adult envelope receipts for a parish as a percentage of the total adult envelope receipts for the diocese for the 2018-2019 fiscal year.

Variable B:

The number of envelope holders who contribute \$100.00 or more per year to a parish, as a percentage of the total number of envelope holders who give \$100.00 or more for the diocese for the 2018-19 fiscal year.

Variable C: School Calculation 1:

Line 102B (School and Convent), for a parish as a percentage of Line 102 for the total for the diocese. This percentage is then multiplied by \$690,000 = C.

Variable D: School Calculation 2:

The total number of students enrolled in Catholic schools multiplied by \$88.00 = D.

Step 1. $\frac{A + B}{2} \times \$6,690,139 = Y$ (Y = DAA Parish Target + Total School Credits)

Step 2. $Y - (D+C) = \text{Parish Target}$

Step 3. Adjustments and reallocations are necessary, so no parish targets increase or decrease by no more than 10%. Nor does a parish target change more than a -\$2,500 decrease or \$10,000 increase.

PARISH REBATES

Parishes receive 100% of all funds the Office of Stewardship and Development processes over the target for a parish. These Rebate checks are issued the second week of the month, beginning in January with a final reconciliation rebate in July. Parish rebates are not included in the envelope receipts used to calculate the target, nor are they used to derive the cathedraticum, i.e., the Quota. Outstanding balances for money owed for the previous year's Appeals will reduce the rebate checks paid.

PARISH RESPONSIBILITY

All parishes are required to meet the target assigned to their parishes by June 30th. For a parish to have the best chance of raising the target funds, follow the procedures and best practices in this manual. The Diocese of La Crosse Finance Office will bill parishes monthly who do not reach their target's outstanding balance target. The Finance Office applies an interest charge at an annualized rate of 6% for any outstanding balances. Please address these payments for target shortfalls to the Diocesan Office for Temporalities in La Crosse.

TIMETABLE

Kickoff

September 2020

New: Parishes will have more flexibility to choose what weekend to choose from for their kickoff weekend.

- September Commitment Weekend – Priests to announce the Appeal and show video
- September Appeal Mailing Drop #1 arriving in homes

December 2020

- December 2nd - Giving Tuesday, a second mailing for parishes that kicked off in September and October.
- December 31st – Year-end donations must be postmarked by 12/31/20, to qualify for 2020 tax year credits.

March 2021

- March 26th, a Holy Week Mailing for all parishes LYBUNTS and any parish under goal will also include SYBUNTS and New/Never-givers.

May 2021

- May 28th End of Year Mailing: All LYBUNTS and any parish under goal will also include SYBUNTS and New/Never-givers.

Gifts postmarked on or before December 31, 2020 will be included in the 2020 tax statement. Please encourage your supporters to mail prior to December 20, 2020. Gifts postmarked after December 31, 2020 will be included in the 2021 tax statements. We suggest encouraging your supporters to mail their payment prior to December 20 to reach us at the office.

SEND ALL PAYMENTS TO THE DIOCESAN ANNUAL APPEAL OFFICE. Send them directly to the address:

**Diocese of La Crosse
PO Box 4004
La Crosse, WI 54602-4004**

Encouraging Electronic Giving is an easier, efficient, and secure way to make timely gifts. Donors will have until 11:59 PM on 12/31/2020 to make last minute gifts in the tax year 2020.

Share the link: <https://diolc.org/donate-online/>

January 2021

- January 12th, 2021 -The Office for Stewardship and Development will run the first “Parish Fund Progress” report from Raiser’s Edge. This report will be the source for calculating rebates. The following Friday, the Office for Stewardship and Development will mail rebate checks to the parishes with cash received exceed their target.
- January 31st, 2021 - The Office for Stewardship and Development mails tax acknowledgments to all donors who have not indicated they do not want tax statements. Note: for single gifts under \$250.00, parishioners can use their check stubs/receipts for tax purposes. If a donor does not receive a tax statement, they may request one by calling the Stewardship office at 608-791-2653.

February 2021

- February 9th - The Office for Stewardship and Development mails rebate checks to parishes that exceeded their target in cash.

March 2021

- March 9th - The Office for Stewardship and Development mails rebate checks to parishes that exceeded their target in cash.
- March 26th – Holy Week mailing

April 2021

- April 13th - The Office for Stewardship and Development mails rebate checks to parishes that exceeded their target in cash.

May 2021

- May 11th - The Office for Stewardship and Development mails rebate checks to parishes that exceeded their target in cash.
- May 28th – Final Mailing

June 2021

- June 8th - The Office for Stewardship and Development mails rebate checks to parishes that exceeded their target in cash.
- All mail that is postmarked 6/30/21 will be applied to this year’s Appeal; all others will be applied to the next year’s Appeal.
- June 30th - The Diocesan Annual Appeal – His Church closes

Gifts postmarked on or before June 30, 2021 will be credited to the current year's Appeal. In an effort to be fair to all parishes, *there will be no exceptions.* **We will apply any postmarked gifts dated after June 30, 2021 to the 2021-22 Annual Appeal.** We suggest mailing your payment early in June to reach us in time. We will credit all online donation made prior to June 30, 2021 at 11:59 PM to the 2018-19 Annual Appeal. Please direct donors to the online giving portal at <https://diolc.org/donate-online/>

SEND ALL PAYMENTS TO THE DIOCESAN ANNUAL APPEAL OFFICE.

Send them to Diocese of La Crosse, PO Box 4004, La Crosse, WI 54602-4004.

REPORTS AND FORMS

GIVINGTREND

GivingTrend (<https://diolc.givingtrend.org>) is the diocesan reporting subscription for authorized Diocesan Annual Appeal staff and volunteers. GivingTrend updates daily during the regular workweek with the previous business day's activities. Parish leadership is encouraged to use all data on the GivingTrend website to report and promote the Diocesan Annual Appeal. There is private and personal information available on the site, so extreme care and judiciousness are required to protect our donors' dignity and data.

We have deployed scanning technology in our office. We have significantly reduced processing times, improved accuracy, and realized lower processing cost because of this technology. The software, which is part of GivingTrend, allows us to scan and electronically process and transmit remittance advice (pledge cards) and checks. The system uses Image Cash Letter technology to send and deposit images of the check. It is the same technology stores use when they scan your check and give it back to you.

Parishes have benefited from the faster process times, crucial in having an accurate report of the parish progress. Parishes can review the remittance advice and checks' actual images, providing more fabulous parishioner service when a parishioner inquires about their gifts.

The Diocesan Annual Appeal uses two kinds of pledge cards. All pledge and remittance cards utilize 2D scan coding to match the donor to the parish's annual appeal fund. If you consider sending parish appeal remittance advice directly from the parish, please contact the Office for Stewardship and Development for document requirements. **Any remittance advice that does not comply with our standards will experience delays in processing up to 30 days**, depending upon the volume of gift processing that the Office for Stewardship and Development is encountering.

If you still need to register to use GivingTrend, please go to <http://appeal.diolc.org/> to find a link to the registration form and training video.

DIRECT MAIL PRE-PRINTED

(Sample below) Each mailed card will have a 2D scan code that will contain the Donor’s Raisers Edge ID, the Parish ID, and other pertinent processing information. The parishioner’s name, the address, will personalize each card.

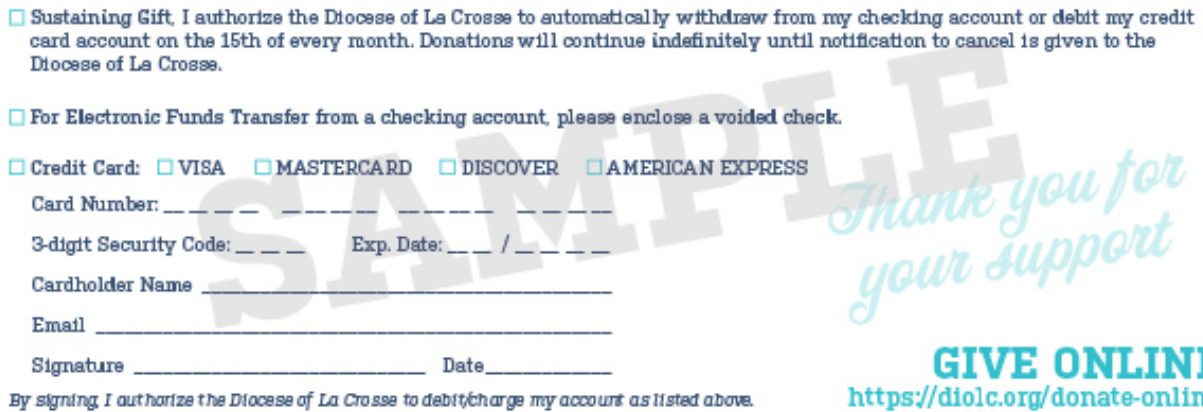
Front of the Direct Mail Card



The front of the direct mail card features a teal header with the text "Stewards of HOPE WE ARE THE DIOCESE". On the right side, there is a vertical logo for the "Diocesan Annual Appeal 2017-2018" with the text "WE ARE THE DIOCESE" and a graphic of a person's profile. The main body of the card contains a form with the following elements:

- <Parish Name>**
- Two checkboxes: One-Time Gift (Paid in Full) and Monthly Pledge (Monthly until 6/30/2018)
- Checkbox: Sustaining Member Gift (indefinite monthly withdrawal)
- Text: "Please select one of the following amounts"
- Amount selection options: \$000, \$000, \$000, Other: \$_____
- Fields: "Total Amount Pledged \$_____" and "Total Amount Enclosed \$_____"
- Text: "Make check payable to Diocese of La Crosse"
- Note: "(Note: See reverse side for Electronic Fund Transfers (EFT) and Credit Card payments information. Gift of Securities, Stock or Grain, please call Finance Office 608-791-2888.)"
- QR code on the left side.
- Unsubscribe options: Please do not send reminders, Please do not send Acknowledgment/Thank You, Please do not send Tax Statements, This gift is anonymous.
- Sample address: "<00000000-000-IM0917-0000> Sample A. Sample 123 Ary Street Anytown, US 12345-6789"

Back of the Direct Mail Card



The back of the direct mail card contains the following form fields and text:

- Checkbox: Sustaining Gift, I authorize the Diocese of La Crosse to automatically withdraw from my checking account or debit my credit card account on the 15th of every month. Donations will continue indefinitely until notification to cancel is given to the Diocese of La Crosse.
- Checkbox: For Electronic Funds Transfer from a checking account, please enclose a voided check.
- Checkbox: Credit Card: VISA MASTERCARD DISCOVER AMERICAN EXPRESS
- Fields: "Card Number: _____", "3-digit Security Code: _____", "Exp. Date: ____ / ____"
- Field: "Cardholder Name _____"
- Field: "Email _____"
- Fields: "Signature _____" and "Date _____"
- Text: "By signing, I authorize the Diocese of La Crosse to debit/charge my account as listed above."
- Stylized text: "Thank you for your support"
- Text: "GIVE ONLINE" and "https://diolc.org/donate-online/"

“IN-PEW” PLEDGE CARDS

(Sample below). This card will not have personal information on it but will have some necessary coding information in the 2D code, including the Parish ID. These are useful for “In Pew Asks,” new parishioners, parishioners who have misplaced their original pledge card, visitors, and Amen Sundays. These cards have lines for people to put their name, address, and parish name on. Using these pledge cards, the Stewardship & Development Office will assign the account numbers for unregistered supporters. For all supporters who are also in your ParishSoft database, we will use their ParishSoft ID. Therefore, **be sure they use a card** with your parish name on it for proper credit. Donors should complete the card in its entirety, specifically their name and address. A completed card is necessary, so the correct parish receives credit for the pledge and payments and sends reminders to parishioners.

Front of the In Pew Card

<Parish Name>

First Name _____ Last Name _____

Address _____ Apartment/Unit # New Address _____

City _____ State _____ Zip _____

Telephone _____ E-Mail _____

Please do not send reminders.
 Please do not send Acknowledgment/Thank You.
 Please do not send Tax Statements.
 This gift is anonymous.



One-Time Gift (Paid in Full)
 Monthly Pledge (Monthly until 6/30/2018)
 Sustaining Member Gift (Indefinite monthly withdrawal)

Please select one of the following amounts

<input type="checkbox"/> \$250	<input type="checkbox"/> \$175	<input type="checkbox"/> \$100	<input type="checkbox"/> \$25
<input type="checkbox"/> \$225	<input type="checkbox"/> \$150	<input type="checkbox"/> \$75	<input type="checkbox"/> Other: _____
<input type="checkbox"/> \$200	<input type="checkbox"/> \$125	<input type="checkbox"/> \$50	<input type="checkbox"/> \$ _____

Total Amount Pledged \$ _____ Total Amount Enclosed \$ _____

Make check payable to Diocese of La Crosse

(Note: See reverse side for Electronic Fund Transfers (EFT) and Credit Card payments information. Gift of Securities, Stock or Grain, please call Finance Office 608-791-2668.)



<00000000-000-IM0917-0000>

Back of the In Pew Card

Sustaining Gift, I authorize the Diocese of La Crosse to automatically withdraw from my checking account or debit my credit card account on the 15th of every month. Donations will continue indefinitely until notification to cancel is given to the Diocese of La Crosse.

For Electronic Funds Transfer from a checking account, please enclose a voided check.

Credit Card: VISA MASTERCARD DISCOVER AMERICAN EXPRESS

Card Number: _____

3-digit Security Code: _____ Exp. Date: ____ / ____

Cardholder Name _____

Email _____

Signature _____ Date _____

By signing, I authorize the Diocese of La Crosse to debit/charge my account as listed above.

Thank you for
your support

GIVE ONLINE
<https://diolc.org/donate-online/>

PARISH INFORMATION FORM

We use a Google Form to update and maintain the parish contact information for the Diocesan Annual Appeal. Complete the form report as soon as possible. Please resubmit any change in leadership or contact information to the Office for Stewardship and Development as early as possible via this form as well.

Please click or copy and paste the following link into your browser.

<https://goo.gl/forms/my7Hh4B2lpjhfeX52>

PROCESSING OF GIFTS

All mailing from the Office for Stewardship and Development includes a return envelope so parishioners can send their initial pledge and contributions directly to the Office for Stewardship and Development for processing. Therefore, every week, parishes should send any funds they collect from parishioners to the Office for Stewardship and Development:

**Diocese of La Crosse
Office for Stewardship and Development
P.O. Box 4004
La Crosse, WI 54602-4004**

PLEASE DO NOT HOLD PAYMENTS OR PLEDGES.

Keeping payments or pledges at the parish has a significant effect on the parish's overall Appeal status because of delays in sending in payments and pledges:

1. Delays our ability to send monthly reminders or make ACH or credit card payments promptly, reducing the probability of collecting all pledges by the end of June.
2. Annoys the parishioners when they have made a payment, and it does not reflect on their reminder or because it has not cleared their bank account.
3. Increases the chances of lost or misplaced payments.
4. Hurts the potential for success by diminishing its momentum and credibility.

Checks should be made payable to the *Diocese of La Crosse*. However, the bank will accept checks made payable to the Diocesan Annual Appeal, and We are the diocese, the Appeal name, e.g., His Church, Bishop's Appeal, or any parish name. **Remittance advice (pledge card) should accompany all payments.**

NOT ALL GIFTS HAVE PLEDGES ASSOCIATED WITH THEM.

Cash Gifts are one-time donations, gift payments that match or exceed the total amount pledged on the remittance advice are not pledged gifts; these gifts are one-time cash. The only gifts, which the

payment represents only a partial payment of the amount pledged, generate a pledge. This accounting of pledge gifts allows for greater transparency for gifts that have open balances.

For example:

J. Smith sends in a check for \$1,000, and the remittance advice (pledge card) has \$1,000 written in the pledge amount. This gift is a one-time cash gift and will not have a pledge associated with it.

Whereas;

J. Smith sends in a check for \$100, and the remittance advice (pledge card) has \$1,000 written in the pledge amount. This gift has an open balance of \$900.00, so it will have a pledge associated with it.

Pledged gifts require multiple payments to fulfill.

What to do with Gifts and Pledges received at the parish

Please proof all remittance advice (pledge cards). Ensure that all lines are completed and legible, especially the parishioner’s name, parish names, and credit card information. If they do not have remittance advice (pledge card), please use one of the parishes “in-pew” remittance advice.

1. Put the remittance advice on top of the corresponding payment.

DO NOT SEND CASH

Send remittance directly to The Office for Stewardship and Development:
Diocese of La Crosse
P.O. Box 4004
La Crosse, WI 54602-4004

2. **PLEASE, DO NOT SEND CASH.** If a donor gives cash, deposit the cash into a parish account and issue a parish check for that amount. Please complete remittance advice (pledge card) with the donor’s name, amount donated, and ParishSoft ID and include it with the check. If the check is for more than one donor, please specify this, completing a pledge card for each and include them with the check. Money orders are accepted.
3. Refer all gifts of stock, grains, or other property and commodities to the Director of Temporalities James Reider, Finance Officer (608) 791-2668, jreider@diolc.org.
4. The Office for Stewardship and Development sends out reminder statements for unpaid pledges to the parishioner by the 15th of each month.

ELECTRONIC PAYMENT OPTIONS

Sustaining Gift

A Sustaining Gift is a gift that a member donates monthly 12 months of the year. Their donations automatically apply to the current year’s Appeal. The Sustaining Gift payments transact on the 15th of the month. Deductions will begin at the next nearest transaction date and continue each month until further notice. A sustaining member can give electronically either by EFT from their checking account or by debit/credit card.

Electronic Funds Transfer (EFT)

To initiate EFT payments, provide the information requested on the back of the pledge card (see sample card below), send a blank voided check with the pledge card, and send both to the Office for Stewardship and Development. If a donor includes an initial payment, with a request for EFT of the remaining pledge, send the pledge card, voided check, and the initial payment to the Office for Stewardship and Development.

If a parishioner wishes to modify or stop any form of electronic payment, he or she must contact the Office for Stewardship and Development directly (Sarah Komperud at 608-791-2653 or skomperud@diolc.org). For us to comply with federal banking regulations governing electronic payments, all modifications must be in writing. Email is an acceptable format of “in-writing.”

A sample of the back of a pledge card:

Sustaining Gift, I authorize the Diocese of La Crosse to automatically withdraw from my checking account or debit my credit card account on the 15th of every month. Donations will continue indefinitely until notification to cancel is given to the Diocese of La Crosse.

For Electronic Funds Transfer from a checking account, please enclose a voided check.

Credit Card: VISA MASTERCARD DISCOVER AMERICAN EXPRESS

Card Number: _____

3-digit Security Code: _____ Exp. Date: ____ / ____

Cardholder Name _____

Email _____

Signature _____ Date _____

By signing, I authorize the Diocese of La Crosse to debit/charge my account as listed above.

*Thank you for
your support*

GIVE ONLINE
<https://diolc.org/donate-online/>

Credit Card Payment Option

Donors can make Credit Card payments in two ways:

1. By making the payment online.
Log on to <https://diolc.org/donate-online/>. This online donation is probably the most convenient for the parishioner: nothing to mail in, no card to fill out. Just go to the website and fill in the blanks.
2. By the Diocesan Annual Appeal Office.
If the parishioner wants the Appeal Office to process their credit card payment, they must complete section #2 under “Credit Card Information” on the back of the pledge card (see above sample) and mail it to the Office for Stewardship and Development. An email address request is necessary so that a donor can receive a receipt.

Questions and Resources for help

If you have any question, comments or need additional help with the Annual Appeal, please call the Office for Stewardship and Development:

Sarah Komperud – skomperud@diolc.org – 608-791-2653

Jeff Reiter – jreiter@diolc.org