

**2021 - 2022**  
**DIOCESE OF LA CROSSE**  
**DIOCESAN ANNUAL APPEAL**  
**PARISH MANUAL**



THAT THEY MAY  
BE ONE AS WE  
ARE ONE

JOHN 17:22

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!"*

The Appeal is one way we invite others, regardless of alliances, 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 and unite ourselves to Christ's given mission by serving and supporting the different ministries funded by the Diocesan Annual Appeal.

Your leadership in the Appeal requires you to use your God-given time, talents, and treasure to encourage others to steward the financial support necessary, and hopefully, it inspires and evangelizes others 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 the previous year, this manual's 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](mailto:jreiter@diolc.org)

Sarah Komperud  
Administrative Assistant  
608-791-2653 or [skomperud@diolc.org](mailto: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, blesses our efforts and lead our families, fellow parishioners, and us closer to the Church through the 2021-22 Diocesan Annual Appeal.

The Diocesan Annual Appeal is the annual effort of the sacramental people of the Roman Catholic Diocese of La Crosse to respond to the Gospel challenge of Jesus Christ. Called by Christ, we worship God, teach the Catholic faith, and serve the needs of the human person by contemplating God's blessings in our lives. The Annual Appeal is a venue that enables the sharing of our gifts to ensure that the Church receives the financial support necessary to

## **MISSION STATEMENT OF THE DIOCESAN ANNUAL APPEAL**

We are called by Christ, transformed by our baptism, sustained in our relationship with Jesus through the sacraments to be stewards of the Good News of His Holy Gospel. The Diocesan Annual Appeal seeks financial and philanthropic gifts by providing an opportunity for sacrificial giving. It serves the Lord by funding those ministries that work to provide relief for the needs of all God's people in our communities by making a significant and positive impact on the lives of our neighbors.

# 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 that 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. Therefore, commitment, clarity, consistency, and repetitiveness 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 has given to the Appeal 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 help 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 demonstrates how the gifts to the Diocesan Annual Appeal 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 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 gathering space 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 30.
  
- 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 your parish's culture and messaging needs.
  
- Use Social Media – use MyParish App to broadcast messages. Tweet on your Twitter and post on your Facebook page Instagram accounts. Check with 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 30 but to encourage everyone to their best abilities.

Materials supplied by the Stewardship & Development Office:

- Posters
- Video
- Parish specific blank (In-pew) 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/](http://www.dioc.org/appeal/))

### **Office of Stewardship and Development Efforts:**

In the weeks leading up to the Appeal weekends, the S&D office works 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. We 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. In addition, if there is an after-Mass event, make pledge cards available for parishioners to complete.

Deliver the “ask” this Sunday via homily and lay testimony. Recap the needs and stories from the prior week, direct requests for prayers, participate 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 giving through monthly installments.

### BEST PRACTICES

1. During Homilies and Witness talks
  - a. The Diocesan Annual Appeal is an opportunity to give proportion to the many blessings received from God. Therefore, do not apologize for the Appeal; 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 supports 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; reminder statements are sent monthly; if they choose not to opt-out.

- 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 payments postmarked on or before June 30 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 ensure 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 faster, more efficient, and more accurate processing. **Gifts received without the correct 2D code can expect up to two weeks or more processing delays.**
  - Setup a Stewardship Table: Set up a station that is convenient and accessible. Ensure 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 are 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 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 more significant gifts and allows parishioners to budget their support monthly, concluding June 30. 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 of the 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 2022 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 are 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 Jesus would do, but asking ourselves 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. They are fasting from conveniences, treasures, and personal and worldly comforts to give back even more of their Time, Talent, and Treasures.

### AMEN SUNDAY

Amen Sunday helps remind 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. In addition, 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 the need to register.

The purpose of Amen Sunday is to generate gifts from parishioners who have not pledged to the Appeal. Therefore, 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. Unfortunately, only about 20% of parish households donate in the first mailing, even in the most mature appeals. Even though parish members will receive the mailing, many will not respond to it because they are not interested in giving, and many 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 complete in-pew process as directed below. 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. In addition, 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 the previous year but has not yet donated this year, they will most likely respond. So 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 make sure you make the best use of your time. In addition, 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 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 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. Suppose parishioners have already pledged; ask them not to complete a card unless they make an additional pledge. In that case, they then need to indicate that it is another pledge on the pledge card. 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 will 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 1<sup>st</sup> - 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 outgoing personalities 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 call 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, which 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 they can pledge to the Diocesan Annual Appeal after Mass that day to avoid a call. 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 many hard-sells happen over the phone, and others 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: the date of the call, whom you spoke to, the 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 31. The following calendar year's activity is any payment postmarked after December 31 that we receive in our office. **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 1 through June 30. The Diocesan Annual Appeal runs concurrently. That is July 1 through June 30. 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 30. Any overpayment will come in the form of a rebate.
  2. Receive a bill from the Finance Office (they go out around July 20) 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 Faithful Prayers 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.”

<b>Gift Level</b>	<b>Dollar Range</b>		<b>Acknowledgment</b>
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. In addition, 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, be capable of keeping accurate records and be 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. Therefore, 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 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 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 Appeal's message and 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 the importance of 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 recognize 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. In addition, 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 2.73% of the overall goal as their target. The goal for the 2021 – 2022 Diocesan Annual Appeal is \$5,788,535.00.

Data from the 2019-20 (last available) Annual Report determines the goals.

- The 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 that is separate from tuition income,
- The number of students enrolled in Catholic Schools

### 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 2019-2020 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 2019-20 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 monthly, during 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 30. Follow this manual's procedures and best practices for a parish to have the best chance of raising the target funds. The Diocese of La Crosse Finance Office will bill parishes monthly who do not reach their target's outstanding balance target. In addition, 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

October 2021

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

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

### December 2021

- December 31 – Year-end donations must be postmarked by 12/31/2021 to qualify for 2021 tax year credits.

### March 2022

- April 10: a Holy Week Mailing for all parishes LYBUNTS and any parish under goal will also include SYBUNTS and New/Never-givers.

### May 2022

- May 23 End of Year Mailing: All LYBUNTS and any parish under goal will 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 2022**

- January 11, 2022 -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 exceeding their target.
- January 31, 2022 - 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 2022**

- February 8 - The Office for Stewardship and Development mails rebate checks to parishes that exceeded their target in cash.

## **March 2022**

- March 8 - The Office for Stewardship and Development mails rebate checks to parishes that exceeded their target in cash.

## **April 2022**

- April 12 - The Office for Stewardship and Development mails rebate checks to parishes that exceeded their target in cash.

## **May 2022**

- May 10- The Office for Stewardship and Development mails rebate checks to parishes that exceeded their target in cash.
- May 23 – Final Mailing

## **June 2022**

- June 14 - The Office for Stewardship and Development mails rebate checks to parishes that exceeded their target in cash.
- All postmarked mail on or before 6/30/2022 will be applied to this year’s Appeal; all mail postmarked after 6/30/2022 will be applied to the following year’s Appeal.
- June 30 - The Diocesan Annual Appeal –closes

**Gifts postmarked on or before June 30, 2022 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, 2022 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, 2022 at 11:59 PM to the 2021-22 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. However, private and personal information is 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 costs 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 the check images. The same technology stores use when they scan your check and give it back to you.

Parishes have benefited from the faster process times, which is crucial for an accurate report of the parish's progress. In addition, 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 parishioners' names their addresses will personalize each card.

### Front of the Direct Mail Card

**Stewards of HOPE**  
WE ARE THE DIOCESE

**Dioceesan Annual Appeal 2017-2018**  
WE ARE THE DIOCESE

<Parish Name>

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

\$000     \$000     \$000     Other: \$ \_\_\_\_\_  
 \$000     \$000     \$000     \$ \_\_\_\_\_

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 608-781-2888.)

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

<00000000-000-IM0917-0000>  
Sample A. Sample  
123 Any Street  
Anytown, US 12345-6789



### Back of the Direct Mail 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/>

## “IN-PEW” PLEDGE CARDS

(Sample below). This card will not have personal information 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 on which people can put their name, address, and parish name. 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.



<00000000-000-IM0917-0000>



Diocese Annual Appeal 2017-2018

WE ARE THE DIOCESE

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	\$ _____

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.)

### 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. In addition, submit changes in contact information to the Office for Stewardship and Development via this form.

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

<https://goo.gl/forms/my7Hh4B2IjihfeX52>

## 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 promptly send monthly reminders or make ACH or credit card payments, 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, complete 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](mailto:jreider@diolc.org).
4. The Office for Stewardship and Development sends out reminder statements for unpaid pledges to the parishioner by the 15<sup>th</sup> 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 15<sup>th</sup> of the month. Deductions will begin at the nearest transaction date and continue each month until further notice. A sustaining member can give electronically either by EFT from their checking account or 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, they must contact the Office for Stewardship and Development directly (Sarah Komperud at 608-791-2653 or [skomperud@diolc.org](mailto:skomperud@diolc.org)). All modifications must be in writing to comply with federal banking regulations that govern electronic payments. 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.  
Suppose the parishioner wants the Appeal Office to process their credit card payment. In that case, 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. Again, an email address request is necessary so that a donor can receive a receipt.

### Questions and Resources for help

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

Sarah Komperud – [skomperud@diolc.org](mailto:skomperud@diolc.org) – 608-791-2653

Jeff Reiter – [jreiter@diolc.org](mailto:jreiter@diolc.org)