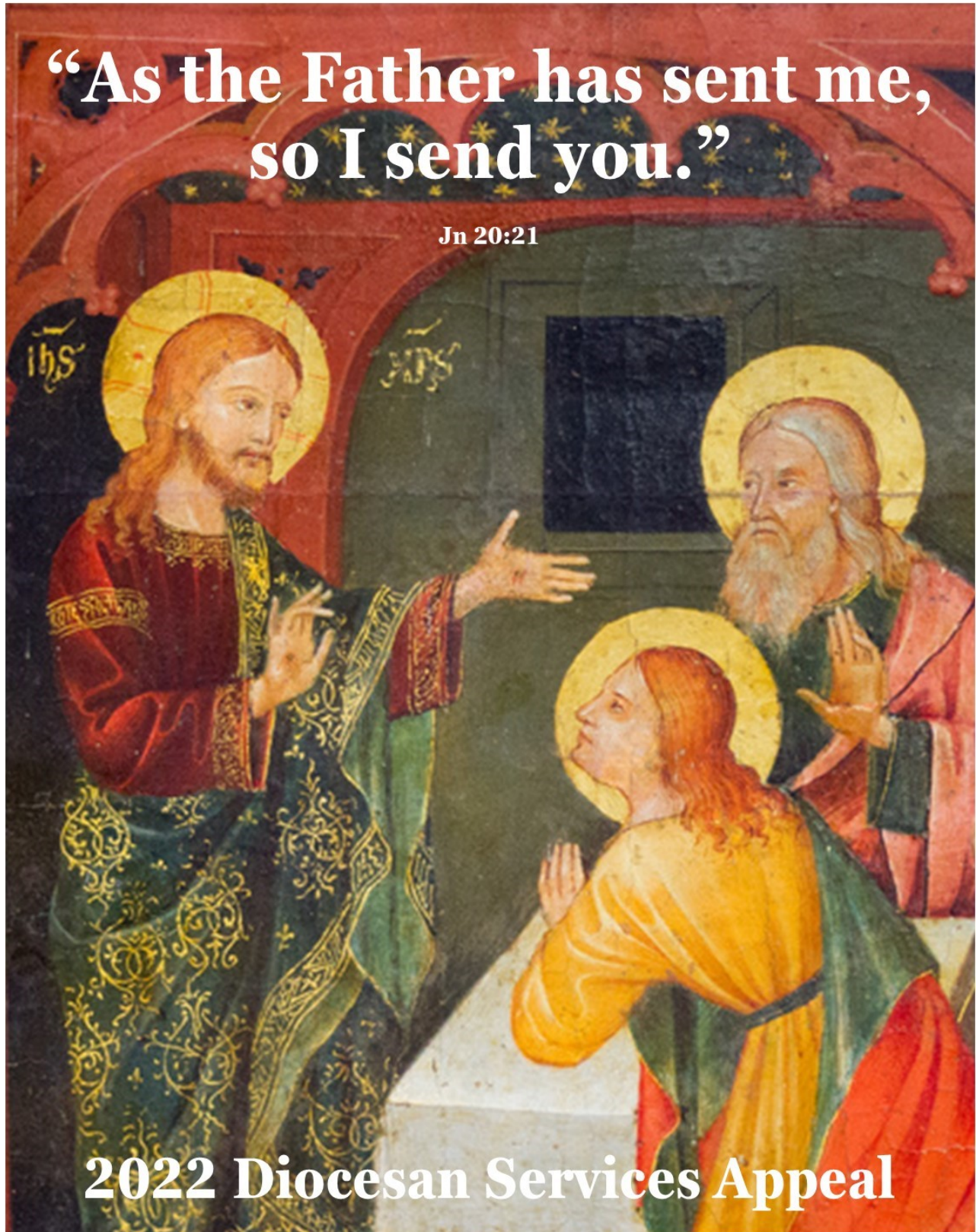

2022 DIOCESAN SERVICES APPEAL RESOURCE MANUAL

**“As the Father has sent me,
so I send you.”**

Jn 20:21



2022 Diocesan Services Appeal

2022 DIOCESAN SERVICES APPEAL GUIDE

THANK YOU

The old adage of fundraising is that a donor does not feel recognized until they have been thanked seven times! So, to show our appreciation for your help in coordinating the DSA, the Development Office would like to say:

Thank You...for all you do at your parish.

Thank You...or your support of our diocese.

Thank You...for your continued generosity.

Thank You...for supporting our ministries.

Thank You...for your continued leadership.

Thank You...for your partnership.

Thank You!



Table of Contents

Overview

| | |
|-------------------------------------|-------|
| Development Office Staff..... | 3 |
| Parish Resources (Online) | 4 |
| DSA Timeline | 5-6 |
| Key Dates for DSA | 7-10 |
| Where the Dollars Go | 11-12 |
| Ways to Give..... | 13-14 |
| 2022 Stock Form..... | 15 |
| Parish Coordinator Tasks..... | 16 |
| Reporting and Procedures | 17-21 |
| Data Entry Procedures..... | 21-23 |
| Clip Art for Bulletins (Print)..... | 24 |

2022 DIOCESAN SERVICES APPEAL GUIDE

Development Staff

Jennifer Trefelner

Director of Communications and Development

561-775-9529

jtrefelner@diocesepb.org

Shannon Voge

Development Coordinator

561-775-9590

svoge@diocesepb.org

Stock Gifts

Matching Gifts

DSA Reporting

Lumen Christi Scholarship Appeal

Joette Irish

Account Manager

561-775-9568

jirish@diocesepb.org

Credit Card Gifts/Updates

Bank Authorization/Direct Debits

Transmittals

Floricea Miguel-Roblero

Assistant Accounts Manager

561-775-9526

froblero@diocesepb.org

Payments/Discrepancies

Parishioner Account Information

PARISH RESOURCE PAGE

DSA Parish Resources

Visit www.DiocesePB.org/DSA and scroll down on the left side to parish materials for the following:

DSA Video (English, Spanish and Creole)

DSA Updates, Reports, Roster and Goal Calculations

2022 What the DSA Supports

2022 DSA Manual and Procedures

2022 Brochure (English, Spanish and Creole)

2022 DSA Timeline

DSA Pulpit Announcements

DSA Logos and 2022 Theme Graphic

DSA Announcement Article

DSA Announcement Graphics

DSA Poster (English, with Spanish and Creole DSA theme included)

DSA Prayer of the Faithful

DSA First Letter Ask from Bishop Barbarito

How to Make a Lay Witness Talk

Sample 2022 Lay Witness Talk

Anything we are missing? Contact the Development Office at (561) 775-9590 and let us know what we can provide.



2022 DIOCESAN SERVICES APPEAL

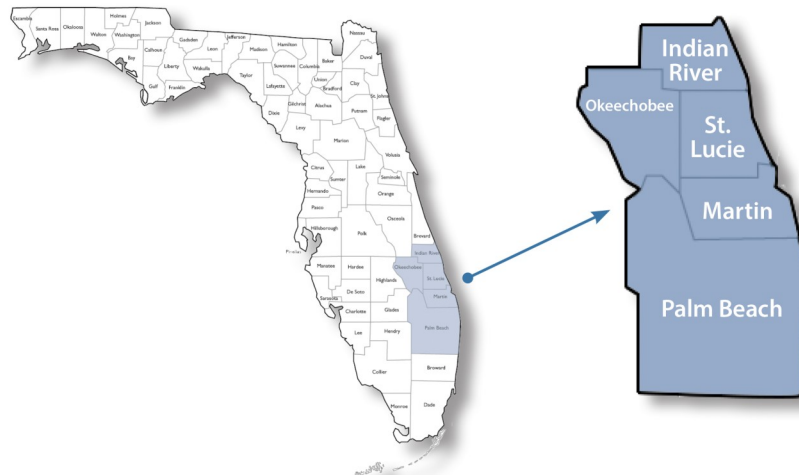
“As the Father has sent me, so I send you.” Jn 20:21

| January 2022 | |
|---|--|
| 11 th | DSA BOOKKEEPER and COORDINATOR TRAINING Training for the bookkeepers regarding processing of DSA gifts and marketing materials will be online via ZOOM on January 11 th . A link will be emailed out from Jennifer Trefelner. |
| 12 th , 13 th , or 14 th | DSA MATERIAL PICK-UP We ask that parishes set up a time on either Wednesday, January 12 th , Thursday, January 13 th , or Friday, January 14 th to pick up their DSA materials at the diocese. Please email Shannon Vogeles at svogeles@diocesepb.org before coming in so we can meet you at the door with your boxes. We are also available to deliver the materials to your parish at a scheduled time. |
| 15 th and 16 th | DSA ANNOUNCEMENT WEEKEND Presider announces upcoming campaign and informs the congregation that all registered parishioners will receive a letter from Bishop Barbarito regarding the campaign. |
| 19 th | BISHOP LETTER – LETTER 1 In advance of Presentation Weekend, all registered parishioners will receive Bishop's personalized letter with a campaign brochure, personalized donation card and return envelope. |
| 22 nd and 23 rd | DSA PRESENTATION WEEKEND Show DVD along with a presentation from Pastor or Chairperson. |
| 29 th and 30 th | DIOCESAN SERVICES APPEAL IN-PEW WEEKEND (For Non-Registered Parishioners) Presentation by Pastor or Chairperson; distribution of donation envelopes at door and/or in pew; instruction given on filling out envelopes and envelope collection. |
| February 2022 | |
| 5 th and 6 th | DIOCESAN SERVICES APPEAL IN-PEW WEEKEND (For Non-Registered Parishioners) Presentation by Pastor or Chairperson; distribution of donation envelopes at door and/or in pew; instruction given on filling out envelopes and envelope collection. |
| 11 th | REPORT #1 Due from all parishes to Pastoral Center. |
| March 2022 | |
| 11 th | REPORT #2 Due from all parishes to Pastoral Center. |
| 23 rd | FOLLOW-UP MAILING FROM PASTOR — LETTER 2 Diocese will be mailing a follow-up letter from the pastor to all registered parishioners who have not yet responded to the 2022 Appeal. |
| November 2022 | |
| 9 th | FOLLOW-UP MAILING FROM BISHOP — LETTER 3 |

Important JANUARY DATES

January 2022

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|-----|-----|---|---|---|---|
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 <i>DSA Material Pick-Up</i> | 13 <i>DSA Material Pick-Up</i> | 14 <i>DSA Material Pick-Up</i> | 15 <i>DSA Announcement Weekend</i> |
| 16 <i>DSA Announcement Weekend</i> | 17 | 18 | 19 <i>DSA Letter 1 Mailed</i> | 20 | 21 | 22 <i>DSA Presentation Video</i> |
| 23 <i>DSA Presentation Video</i> | 24 | 25 | 26 | 27 | 28 | 29/30 <i>In-Pew Weekend</i> |



KEY DATES FOR DSA

OCTOBER 2021

DSA MATERIAL ORDER FORM

In early October, a letter was sent to every parish to start the next year's appeal. We ask whomever will be managing the DSA to respond with how much material they will need the diocese to provide for them to be picked up in January. This includes DVD or flash drive of the DSA video, in-pew envelopes, labels, transmittals, brochures and DSA posters.

DSA DATA UPLOAD

Also in early October, an email regarding a data upload was sent out. It included instructions from our IT department on how to pull names and addresses from your parish management system. We compare this information to ours at the diocese to make sure all the addresses are updated and correct before Bishop sends out his first letter.

JANUARY 2022

DSA PARISH BOOKKEEPER AND COORDINATOR TRAINING

January 11th

Training for the bookkeepers and coordinators regarding processing of DSA gifts and marketing materials will be online via Zoom on January 11th.

A link was emailed out from Jennifer Trefelner. If you would like to attend the meeting and did not receive the link, please email Jennifer at jtrefelner@diocese.pb.org.

DSA Material Pick-Up or Delivery

January 12th, 13th, and 14th

Parish representatives are asked to come to the Pastoral Center to pick up their DSA materials. The boxes will include the pre-ordered number or quantity of each in English, Spanish and Creole, if needed.

- Manual
- DSA DVD
- Transmittals
- Labels
- In-Pew Envelopes
- Posters (Small, Medium, Large)
- Brochures

NOTE: The Materials Order Form and Leadership Form were sent to parishes in October.

KEY DATES FOR DSA

continued

ANNOUNCEMENT WEEKEND

January 15th and 16th

Parishes announce this year's campaign and theme at Masses and inform attendees that all registered parishioners will receive a letter from Bishop Barbarito (Letter 1) around January 21st regarding the campaign. Along with the letter, they will receive a personalized donation card, a campaign brochure and a return envelope addressed to the Diocese of Palm Beach.

Place an article or a personalized letter regarding the DSA in your parish bulletin. See diocesan website for templates. <https://www.diocesepb.org/ministriesoffices/offices/development/>

NOTE: A sample announcement and bulletin insert are available online for whomever you choose to announce it (Pastor, DSA Chair or Coordinator).

LETTER #1 (Bishop's First Letter)

January 19th

Prior to the Presentation Weekend (January 22nd and 23rd), all registered parishioners will receive the Bishop's personalized letter with a personalized donation card, a campaign brochure and a return envelope addressed to the Diocese of Palm Beach.

If a parishioner would like to donate online, they may do so at www.diocesepb.org/dsa.

PRESENTATION WEEKEND

January 22nd and 23rd

DSA video shown at Masses accompanied by a presentation from the Pastor or Chairperson where parishioners are reminded of the good works made possible by the DSA.

TIP: *Remind parishioners that, if they are going to make a donation, to do it through the mailing they receive. We will send out reminders starting April 1st.*



KEY DATES FOR DSA

continued

IN-PEW WEEKEND (for Non-Registered Parishioners)

January 29th and 30th OR February 5th and 6th

In-Pew Weekend is an opportunity for anyone who either isn't a registered parishioner or has not yet donated in response to the mailing to support the diocesan effort.

- This weekend should be announced beforehand so that people can be prepared to donate.
- Have ushers hand out in-pew donation envelopes (see page 17 for example) at door as parishioners arrive. These were included in the materials picked up in January.
OR
- Place in-pew envelopes in each pew.
- Announce to parishioners that today is "Commitment Saturday/Sunday" in support of this year's Diocesan Services Appeal. Every family attending Mass today is asked to offer a generous donation to advance the mission and ministry of the local Church.
- Presentation by Pastor or Chairperson
 - Provide a brief recap of the importance of the Diocesan Services Appeal and the ministries that receive direct funding. **(See last page of manual for resources)**
 - Talk about the need for participation of both seasonal and permanent parish/diocesan family members. Urge 100% participation on some level.
 - Explain how non-registered Mass attendees should fill out the donation in-pew envelope since they did not receive Bishop's letter in the mail.
 - Call the ushers forward to collect the in-pew envelopes SEPARATELY from the regular Sunday Offertory Collection and place before the altar. (Optional, but recommended.)
 - Thank parishioners for their generous support of the Catholic ministries and outreach programs throughout the diocese, and for their assistance in reaching this year's parish goal.

REPORT #1 February 11th

FEBRUARY

Monthly transmittal reports (see page 18 "Sending Cash and Checks") are sent to the diocese by the parish bookkeepers with all of the donations that **came directly to the parish or were collected on In-Pew Weekend.**

The reports are due from all parishes via mail or hand delivery to the diocesan Development Office at the Pastoral Center.

Pastoral Center: 9995 N. Military Trail, Palm Beach Gardens, FL 33410

KEY DATES FOR DSA

continued

MARCH

REPORT #2 March 11th

The second monthly transmittal report (ex: page 18 “Sending Cash and Checks”) is sent to the diocese by the parish bookkeeper with all of the donations that **came directly to the parish or were collected on In-Pew Weekend**. Report #2 is imperative so our system is up to date prior to the second letter going out from the Pastor asking for support from those who have not yet contributed.

The reports are due from all parishes via mail or hand delivery to the diocesan Development Office at the Pastoral Center.

Pastoral Center: 9995 N. Military Trail, Palm Beach Gardens, FL 33410

LETTER #2 (Pastor's or Bishop's Letter) March 23rd

The second letter is sent out by the diocesan Development Office on parish letterhead and is electronically signed by each pastor. Our mailing house *Letters Concepts Inc.* will contact each parish to help set up and facilitate the letter. All registered parishioners who have not yet donated to the DSA by March will receive this letter. Pastors have the option of having the letter come from Bishop Barbarito instead of themselves.

NOVEMBER

LETTER #3 (Bishop's Second letter) November 9th

Letter #3 is the third and final letter. It is sent from the Bishop to all parishioners who have not yet donated, LYBUNTs and SYBUNTs.

LYBUNT: Last year, but unfortunately not this year

SYBUNT: Some years, but unfortunately not this year

If at this point you are struggling to meet your goal, we ask that you remind everyone that this letter will be arriving and that they may still donate at Mass with an in-pew envelope or online at the diocesan website www.DiocesePB.org.



Please Note: Any parish that exceeds its DSA goal will receive back at the conclusion of the campaign, up to 50% of the overage for its unrestricted use.



Diocese of Palm Beach Development Office

Jennifer Trefelner

Director of Communications
and Development
(561)775-9529
jtrefelner@diocesepb.org

Shannon Voegel

Development Coordinator
(561)775-9590
svogel@diocesepb.org

DSA Reporting
Matching Gifts
Stock Gifts

Joette Irish

Account Manager
(561)775-9568
jirish@diocesepb.org

Transmittals
Credit Cards/Updates
Direct Debit/Bank
Authorization

Floricela Miguel-Roblero

Assistant Acct. Manager
(561)775-9526
froblero@diocesepb.org

Payments/Discrepancies
Parishioner Accounts

Where the Dollars Go

Catholic Education and Faith Formation

Education remains critically important in the formation of the human person by teaching how to live well now, so as to be able to live with God for all eternity.

Catholic education and formation address the development of the whole person through spiritual and academic formation based on the Gospel of Our Lord Jesus Christ. The mission of Catholic education is a vital part of the New Evangelization and presents the Gospel within our school and parish communities.

Our schools, faith formation, religious education and youth ministry programs, campus ministry outreach and RCIA contribute to the common good by developing active and caring members of the community.

- Liturgy
- Superintendent of Schools Office
- Religious Education Office
- Catholic School Management Office

Cultural Ministries

The Diocese of Palm Beach is a mosaic of cultures, traditions and people who have come to our area from all over the world in search of employment, family and friendship. As the local church, we embrace our ethnic communities:

Hispanic, Haitian, African-American, Guatemalan, Filipino, Vietnamese, Portuguese/Brazilian and others. We lend a hand by assisting people to assimilate into the American culture and way of life, while maintaining the beauty and richness of their own customs and traditions.

- Hispanic Ministry
- School of Christian Formation
- Support to Haitian Ministries
- Support to diocesan mission parishes

Marriage and Family Life

One of the priorities of our diocese is family life. We want to support our families in every way we can and to promote the sanctity and dignity of marriage and family life as God's gift to us. It is in the family that we truly find joy in life.

The primary role of the family has been undermined in many ways in our contemporary culture, creating a greater need for Catholic families to sustain themselves.

- Family Life
- Youth Ministry
- Natural Family Planning
- Campus Ministry

Communication

Our use of technology to spread the Gospel is just one example of the many ways that we, as a diocesan community, are able to reach out to the world around us and proclaim our belief in God. The word of God can be heard, seen and read at any time.

Our locally produced Sunday televised Mass reaches out to people who are homebound, in nursing homes, hospitalized, imprisoned or for any reason unable to be physically present in worshipping.

Your donation to the DSA helps the diocese use television and other contemporary media to carry a message of hope and caring to people who are isolated and looking for a connection with their faith.

- Florida Catholic
- TV Mass

Visit the Diocesan Services Appeal Website: **DIOCESEP.B.ORG/DSA**

Where the Dollars Go

Chancery/Support Services

Chancery/Support Services consists of the leadership within the diocese. It includes the Office of the Bishop and supports the Pastoral Center that includes the Vicar General, Chancellor's Office, Legal and Finance Office, Development, Information Technology, and Benefits Offices. These are all necessary to help the diocese run smoothly and meet all the needs of the parishes.

- Bishop and Chancery Office
- National Assessments to the USCCB
- Legal Services
- Information Technology
- Benefits Services
- Vicar for Religious Women

Vocation, Seminary & Diaconate Formation

Formation programs continue to build a foundation of leaders within our local church. We support the education and recruiting of new and potential priests and deacons.

- Permanent Deacon Formation
- Permanent Deacons
- Seminary Support
- Clergy Services
- Office of Ecumenical and Interreligious Relations

Catholic Charities

Catholic Charities continues to be a steadfast example of the church's effort to follow Christ's call to serve our brothers and sisters in need. Last year, more than 9,000 clients were served. Programs include promoting respect for life, counseling, elder affairs, immigration, pregnancy care, transitional housing for the homeless and prison ministry.

- Catholic Relief Services
- Counseling Services
- Birthline/Lifeline Pregnancy Care Centers
- Elder Affairs
- Guardianship Training
- Hunger and Homeless Outreach
- Immigration Legal Services
- Interfaith Health and Wellness
- Parish Social Ministry
- Prison Ministry
- Refugee Resettlement & Human Trafficking
- Respect Life
- Samaritan Center/Transitional Housing

WAYS TO GIVE TO THE 2022 DSA

CASH / CHECK

Please make checks payable to:

Diocese of Palm Beach—DSA
9995 N. Military Trail
P.O. Box 109650
Palm Beach Gardens, FL 33410



CREDIT CARD DONATIONS

Give online, by phone or send in a pledge card.



Donors can make a one-time donation or schedule monthly payments using their credit card. Verify that they have signed and dated the form and have included their daytime phone number.

Bank Authorization (Direct Debit)

Donors may have automatic withdrawals made from their checking or savings account by completing the **Bank Authorization** portion of the pledge card/in-pew envelope. Make sure that they have marked their choice of withdrawal dates, signed the form and included their daytime phone number.

***A voided check must be included for the withdrawal to be set up properly.**

MONTHLY BILLING

Make a pledge today and the Diocese of Palm Beach Development Office will send monthly reminders starting on April 1st for the next ten months until December. There is no minimum payment.

ONLINE DONATIONS

Donors may make a credit card donation or payment to the 2022 Diocesan Services Appeal by going to our website, www.DiocesePB.org/DSA, and click on the Give Now button. The dollar amount entered will be the amount charged to the credit card.

For issues with credit cards or online donations, please contact Joette Irish at 561-775-9568.

Any payments received after 12/31/2022 will be credited to the 2023 DSA.

OTHER WAYS TO GIVE TO THE 2022 DSA

The Diocese of Palm Beach has the capability to accept many types of gifts and can help determine feasibility and tax benefits for them. Some of these may be complicated, and we ask you to contact us at 561-775-9590 before accepting gifts that are not easily liquidated. The Development Office is here to help you with any donation questions and support you in receiving the maximum benefit from a donor's generosity.

STOCK DONATION

Gifts of stock can be donated to the diocese, a parish or any school within the diocese. Have the donor visit www.diocesepb.org or copy and print the stock form from the next page. For questions regarding stock gifts, please contact Shannon Voegel at 561-775-9590 or svoegel@diocesepb.org.

IRA CHARITABLE ROLLOVER PROVISION

IRA donors who are age 70 years and six months old or older can instruct IRA trustees to make transfers to the Diocese of Palm Beach without incurring taxable income on those amounts. Please have donors consult with their financial advisor for details.

MATCHING GIFTS

Please check with your company HR department to see if they offer a matching gift program. The Diocese of Palm Beach is a recognized 501(C)3 non-profit.

REAL ESTATE

Contact: Dan Lewis at (561) 775-9538 or email dlewis@diocesepb.org.

Contributing real estate to the diocese and/or parish, whether a personal residence, family farm, vacation home, condominium, townhouse, cooperative apartment, business property or speculative acreage can be highly advantageous to a donor. A donor may have a significant income tax charitable deduction and avoid capital gains tax.

PERSONAL PROPERTY

Gifts of artwork, collections or other tangible goods can be donated to the diocese, a parish or a school within the diocese. For information on gifts of personal property and tax benefits, please call the Development Office at (561) 775-9590.

VEHICLES

A vehicle, including an old car, boat or RV, can be donated to the DSA or any diocesan entity. For more information, visit www.diocesepb.org.

2022 Stock Transfer Form for Diocesan Entities

Diocese of Palm Beach

STOCK TRANSFER

Instructions for the transfer of stock to benefit the Diocesan Services Appeal, Capital Campaign, or Ministry within the Diocese of Palm Beach, a corporation sole. Please completely fill-in all required information below and email your broker and the Office of Development at the Diocese of Palm Beach.

Please deliver security to:

National Financial Services
DTC 0226
For Credit to the Diocese of Palm Beach
Contribution Account Number Z85-976636

*Account information
needed for a broker to
transfer funds to the
diocese's Fidelity ac-
count.*

AND

Please send a copy of this form to:

Shannon Vogele, Development Coordinator
Diocese of Palm Beach
PO Box 109650
Palm Beach Gardens, FL 33410
Email: svogele@diocesepb.org
Fax: (561)799-9527 Phone: (561)775-9590

*Contact Shannon
Vogele with the
donor's
information so we
can make sure the
gift is sent to you.*

TO:

Donor's Broker _____

Broker's Phone _____

Broker's Email _____

FROM:

Donor's Name _____

Donor's Address _____

Telephone _____

Email _____

Name of Security _____

Number of Shares _____

Designated Use _____

Donor's Signature _____

Date _____

All gifts to the Diocese of Palm Beach at tax deductible as they are a registered 501(C)3 nonprofit. The tax benefit received will be based off the hi, low, and mean average of the day the stock is transferred to the diocesan Fidelity account.

Tax ID #: 59-2438903

Parish Coordinator Duties

- Ensure that the Diocesan Services Appeal is effectively carried out in the parish.
- Serve as the lay spokesperson for the Diocesan Services Appeal.
- Assist in the selection of the plan for participation from the options presented in the parish training manual.
- Make a sacrificial commitment to the parish and diocesan community.
- Pray for the success of the appeal.
- Follow timeline or assist the pastor in implementing one that fits your individual parish.
- Become familiar with all the Diocesan Services Appeal materials.
- Recruit a sufficient number of volunteers to assist you.
- Assist your pastor in all areas of conducting a smooth in-pew solicitation, but encourage parishioners to use the personalized pledge card.
- Make proper use of program materials and visual aids (bulletin and pulpit announcements, Bishop's letter, video, lay witness, etc.).
- Provide opportunities for every parishioner to be able to respond.
- Do not assume that someone cannot give. Gifts of time and prayer are also needed for the success of the DSA.
- Follow reporting procedures the Development Office has prepared.
- Conduct an adequate follow-up to the appeal weekend to ensure that your parishioners have been given every opportunity to give.
- Aim for 100% participation.

Communication Duties

- Publicize DSA throughout the year in the parish bulletin.
- Make DSA brochure available in-pew throughout the year.
- Work with pastor to incorporate comments in Sunday homilies.
- Make proper use of program materials and visual aids (bulletin and pulpit announcements, Bishop's letter, video, lay witness, etc.).
- Pray for the success of the appeal.

Visit

[www. DiocesePB.org/DSA.](http://www.DiocesePB.org/DSA)

For all parish resources,

see last page.


In-Pew Weekend and Follow-Up Duties

- Make sure the pastor and any other speaker(s) are properly briefed and given the correct speaking points for In-Pew Weekend. (See parish resources page 25.)
- Place extra pens or pencils and in-pew envelopes at the end of the pews prior to each Mass on In-Pew Weekend and the following week(s).
- Determine – with the pastor – the best approach for collecting the in-pew envelopes (e.g., the regular weekly collection, a special collection or a family will bring them to the altar).
- Make sure thank-you letters/cards are sent to all households that returned an in-pew envelope (Bishop will also acknowledge all gifts).
- Make sure pledges are properly recorded.
- Process the in-pew envelopes using the materials provided by the Development Office.
- Pray for the success of the appeal.

REPORTING & RETURN PROCEDURES

PLEDGE CARDS

Registered parishioners receive in mail as part of the Letter 1 packet from Bishop. As a registered parishioner, they should have a label and be part of the parish roster.

| | | | | | | | | | | | | | | | | | | | | | |
|--|------------------|--|--|------------------|--|-----------------------------------|--------|-------------|---------------------------------|-------|--|---------------------------------|-------|--|---------------------------------|-------|--|---------------------------------|--|--|--|
| 2022 Diocesan Services Appeal | | Diocese of Palm Beach - 561-775-9590 | | | | | | | | | | | | | | | | | | | |
| ID# | | Pledge/Gift Total | \$ _____ | | | | | | | | | | | | | | | | | | |
| Parish Code - Parish Name | | Amount Enclosed | \$ _____ | | | | | | | | | | | | | | | | | | |
| Name | | Balance | \$ _____ | | | | | | | | | | | | | | | | | | |
| Address Line 1 | | <input type="checkbox"/> Cash | <input type="checkbox"/> Check # _____ | | | | | | | | | | | | | | | | | | |
| City, State, Zip | | <input type="checkbox"/> EFT | <input type="checkbox"/> Credit Card (See Reverse) | | | | | | | | | | | | | | | | | | |
|  | | <table border="0"> <tr> <td>Single Sum</td> <td>Ten Month Pledge</td> <td></td> </tr> <tr> <td><input type="checkbox"/> \$ 1,000</td> <td>\$ 100</td> <td>DSA Partner</td> </tr> <tr> <td><input type="checkbox"/> \$ 500</td> <td>\$ 50</td> <td></td> </tr> <tr> <td><input type="checkbox"/> \$ 300</td> <td>\$ 30</td> <td></td> </tr> <tr> <td><input type="checkbox"/> \$ 100</td> <td>\$ 10</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Other:</td> <td></td> <td></td> </tr> </table> | Single Sum | Ten Month Pledge | | <input type="checkbox"/> \$ 1,000 | \$ 100 | DSA Partner | <input type="checkbox"/> \$ 500 | \$ 50 | | <input type="checkbox"/> \$ 300 | \$ 30 | | <input type="checkbox"/> \$ 100 | \$ 10 | | <input type="checkbox"/> Other: | | | |
| Single Sum | Ten Month Pledge | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> \$ 1,000 | \$ 100 | DSA Partner | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> \$ 500 | \$ 50 | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> \$ 300 | \$ 30 | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> \$ 100 | \$ 10 | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Other: | | | | | | | | | | | | | | | | | | | | | |
| <p>FOR CORRECTIONS ONLY</p> <p>Name _____</p> <p>Address _____</p> <p>Phone number () _____</p> <p>Parish _____</p> <p>Email address _____ (for DPB purposes only).</p> | | | | | | | | | | | | | | | | | | | | | |
| <p>* Make check payable: <i>Diocese of Palm Beach - DSA</i> • Reminders sent April through December</p> <p>The 2022 DSA concludes as of 12/31/22.</p> | | | | | | | | | | | | | | | | | | | | | |

Labels should be placed here.

IN-PEW ENVELOPES

Labels are provided for in-pew envelopes. The majority of people who give via in-pew envelopes may not be registered. Therefore, they would not have a label. For those who do have a label, we ask you to use the label as it has their diocesan ID number attached. This label should be attached in the lower left-hand corner of the envelope under the donor information. Please write and then highlight any changes to the donor's information in yellow. In-pew envelopes should be stamped with some type of parish identifier, so if a donor does not have a label we can identify the parish to receive credit for the donation.

| | |
|--|---|
| <h3>BANK AUTHORIZATION</h3> <p>I wish to transfer _____ monthly payments of \$ _____ for a total of \$ _____. Starting month: _____ *</p> <p>Please make this electronic transfer on the (check one):</p> <p><input type="checkbox"/> 5th of the month <input type="checkbox"/> 20th of the month</p> <p>(Must enclose a voided check) DOPB....will appear on your statement</p> <p>Signature _____</p> <p>Daytime Phone () _____</p> | <h3>CREDIT CARD AUTHORIZATION</h3> <p><input type="checkbox"/> American Express <input type="checkbox"/> Visa <input type="checkbox"/> MasterCard</p> <p>Credit Card No. _____</p> <p>Exp. Date _____ (Mo.) _____ (Yr.)</p> <p>I wish to charge _____ monthly payments of \$ _____ for a total of \$ _____. Starting month: _____ *</p> <p>Print Name of Cardholder _____</p> <p>Cardholder Signature _____</p> <p>Daytime Phone () _____ Date _____</p> |
| <p>Make online donations at Diocesepb.org/dsa</p> <p>*The 2021 Diocesan Services Appeal concludes as of 12/31/22</p> | |

If information on the label does not match what was written, please highlight the changes.

| | | | | | | | | | | | | | |
|--|---|------------|------------------|------------------------------------|---------------|-------------|---------------|-------------------------|---------------|-------------|---------------|---------------------|------------------|
| <h3>2022 Diocesan Services Appeal</h3> <p>Please circle: Mr. and/or Mrs. Miss Ms. Rev. Dr.</p> <p>Address: _____</p> <p>City, State, Zip _____</p> <p>Phone # _____</p> <p>Local Parish _____</p> <p>Signature _____ Date: _____</p> | <h3>Diocese of Palm Beach - 561-775-9590</h3> <h4>Suggested Gift Plans</h4> <table border="0"> <tr> <td>Single Sum</td> <td>Ten Month Pledge</td> </tr> <tr> <td>____ \$1,000 (Become a Partner)</td> <td>\$100 / month</td> </tr> <tr> <td>____ \$ 500</td> <td>\$ 50 / month</td> </tr> <tr> <td>____ \$ 300 (\$1 a Day)</td> <td>\$ 30 / month</td> </tr> <tr> <td>____ \$ 100</td> <td>\$ 10 / month</td> </tr> <tr> <td>____ Other \$ _____</td> <td>\$ _____ / month</td> </tr> </table> <p>*Make check payable: <i>Diocesan Services Appeal</i> • Reminders sent April through December</p> <p>The 2022 DSA concludes as of 12/31/22</p> <p>Email address _____ (for DPB purposes only).</p> | Single Sum | Ten Month Pledge | ____ \$1,000 (Become a Partner) | \$100 / month | ____ \$ 500 | \$ 50 / month | ____ \$ 300 (\$1 a Day) | \$ 30 / month | ____ \$ 100 | \$ 10 / month | ____ Other \$ _____ | \$ _____ / month |
| Single Sum | Ten Month Pledge | | | | | | | | | | | | |
| ____ \$1,000 (Become a Partner) | \$100 / month | | | | | | | | | | | | |
| ____ \$ 500 | \$ 50 / month | | | | | | | | | | | | |
| ____ \$ 300 (\$1 a Day) | \$ 30 / month | | | | | | | | | | | | |
| ____ \$ 100 | \$ 10 / month | | | | | | | | | | | | |
| ____ Other \$ _____ | \$ _____ / month | | | | | | | | | | | | |

Labels should be placed here.

REPORTING & RETURN PROCEDURES *continued*

ONLINE DONATIONS

We recommend that a link on your parish website for the DSA goes directly to the official DSA website.

If donors give to the DSA via your parish website (Ex: Vanco, Faith Direct, OSV), please report the donations to us monthly. Include the donor's name, address, envelope number or some identifier so proper credit may be given. A parish check should be included for the total amount of the donations. This helps with ensuring accuracy with the recording of the donations.

CASH AND CHECK DONATIONS

We recommend that you send all your donations via transmittals to the diocesan Development Office at the Pastoral Center on the following dates.

Report #1 February 11, 2022

Report #2 March 11, 2022

After these dates, please be sure to send all donations to the diocesan Development Office at the Pastoral Center on or before the 25th of each month. This will ensure proper crediting and keep monthly reminders current.

If you choose not to use a transmittal, we ask you to please forward all pledge cards/in-pew envelopes and checks to the diocesan Development Office at the Pastoral Center.

TRANSMITTALS

The following steps are presented to assist you in creating a transmittal.

STEP #1

Arrange pledge cards/in-pew envelopes in alphabetical order.

STEP #2

Affix the label to the in-pew envelopes and pledge cards. On in-pew envelopes, place the label in the bottom left-hand corner under the donor information. With pledge cards, place the label in the blank space center top. Make sure label covers no needed information. The labels are printed in alphabetical order per your roster. (Parish rosters can be found on the parish bookkeeper's site under Development & Current year). Verify that the handwritten information and the label information match. If there are any changes in the donor's information, please highlight the change in yellow.

STEP #3

No Labels: If you have a donor that does not have a pre-printed label, check to see if the donor is listed in the roster.

CASH AND CHECKS DONATIONS *continued*

STEP #3 *continued*

If the donor is listed in the roster, it may be an increase or a payment. See “Special Circumstances.”

If the donor is not listed:

Write “NEW” in red ink on the top of the donor pledge card/in-pew envelope. Make sure the information is complete and legible.

STEP #4

Compare names on parish roster with names on pledge cards/in-pew envelopes received. Enter amount pledged/paid in the right-hand column marked 2022 pledge.

SPECIAL CIRCUMSTANCES TO WATCH FOR AFTER REPORT #1:

INCREASE: It is an increase when a donor, who has previously sent in a **Paid-in-Full Donation**, sends in another donation. Please indicate, in red, on the second pledge card/in-pew envelope, the word **INCREASE** and place in the Paid-in-full category. **Please be sure account number is clearly marked.**

PAYMENT: It is a payment when a donor, who has previously sent in a pledge donation, sends in another donation. Please indicate, in red, on the second donation the word **PAYMENT** and place in the Paid-in-Full category. **Please be sure account number is clearly marked.**

STEP #5

Sort pledge cards/in-pew envelopes into the following categories, keeping each in alphabetical order. (Set credit card pledges and bank authorization contributions aside).

| PAID IN FULL | |
|--|--|
| PARISH _____ | PARISH # _____ |
| TOTAL AMOUNT PAID <small>(Include Miscellaneous)</small> | \$ _____ <small>(include Adding Machine Tape)</small> |
| TOTAL NUMBER OF CARDS/ENVELOPES IN THIS BATCH _____ <small>(Figures should include Miscellaneous)</small> | |
| THIS BATCH SENT WITH TRANSMITTAL # _____ | |
| DATE _____ | PREPARED BY _____ |

| PLEDGES WITH PARTIAL PAYMENT (DOWN PAYMENT) | |
|---|--|
| PARISH _____ | PARISH # _____ |
| (A) TOTAL AMOUNT PLEDGE | \$ _____ |
| (B) TOTAL AMOUNT PAID DOWN | \$ _____ |
| (C) UNPAID BALANCE | \$ _____ <small>(include Adding Machine Tape)</small> |
| NOTE: (B) PLUS (C) MUST EQUAL (A) | |
| TOTAL NUMBER OF CARDS/ENVELOPES IN THIS BATCH _____ | |
| THIS BATCH SENT WITH TRANSMITTAL # _____ | |
| DATE _____ | PREPARED BY _____ |

| PLEDGES WITH NO DOWN PAYMENT | |
|---|--|
| PARISH _____ | PARISH # _____ |
| TOTAL AMOUNT PAID | \$ _____ <small>(include Adding Machine Tape)</small> |
| TOTAL NUMBER OF CARDS/ENVELOPES IN THIS BATCH _____ | |
| THIS BATCH SENT WITH TRANSMITTAL # _____ | |
| DATE _____ | PREPARED BY _____ |

Use a “Paid-in-Full” card on top of envelopes that have the entire payment, essentially a one-time gift.

Use a “Pledges w/ Partial Down Payment” card on top of envelopes when they make a pledge and include the first payment.

Example: I make a pledge of \$1,000 and include a \$100 check.

Use a “Pledges w/ No Down Payment” card on top of envelopes when they make a pledge and provide no money.

We will record it and send them a reminder starting April 1st.

CASH AND CHECKS DONATIONS *continued*

STEP #6

MISCELLANEOUS - PAID IN FULL will be used for the following:

For donors who **DO NOT** have an assigned account number and contribute \$10 or less.

| MISCELLANEOUS | | PAID IN FULL | |
|---|------|---------------------|--|
| PARISH _____ | | PARISH # _____ | |
| TOTAL AMOUNT <small>(Include Miscellaneous)</small> | PAID | \$ _____ | <small>(Include Adding Machine Tape)</small> |
| Rubber band all Miscellaneous envelopes to this card. Please include with "PAID IN FULL" batch. | | | |
| TOTAL COUNT FOR THIS CARD | | ONE ENVELOPE | |
| THIS BATCH SENT WITH TRANSMITTAL # _____ | | | |
| DATE _____ | | PREPARED BY _____ | |

Rubber band all envelopes in this category and attach to the yellow MISCELLANEOUS - PAID-IN-FULL Card. Complete this category card showing the total amount. This whole category will be counted as ONE envelope on your WHITE Paid-in-Full Card. Please place these at the end of the Paid-in-Full category.

STEP #7

Please complete – **IN RED** – all boxes on the pledge card/in-pew envelope that the donor has neglected to complete. **Especially the gift amount & check number!**

Run two calculator tapes for each batch — one on the “Amount Enclosed” written on the pledge card/in-pew envelope and one on the checks and cash. Be sure your totals match before proceeding.

STEP #8

Rubber band pledge cards/in-pew envelopes for each category separately. Place proper completed category card on top and include calculator tapes. Total all category cards and enter figure on Transmittal Form. Include calculator tape of the totals.

STEP #9

Deposit all monies removed from pledge cards/in-pew envelopes into Parish Account. This deposit should be the same as the total entered on the Transmittal Form. Write a parish check for amount indicated on Transmittal Form. Make payable to Diocesan Services Appeal.

SECOND COLLECTIONS

If you wish to do a second collection (**after April 1st**) to help reach your DSA goal, please treat it similar to the non-parochial collections you do every month. Please collect the donations and record them at the parish and send in one check to the DSA office noting it is from a second collection. We can also provide extra in-pew envelopes for these second collections with advance notice.

REPORTING & RETURN PROCEDURES *continued*

CREDIT CARD & BANK AUTHORIZATION (Direct Debit)

Complete the Credit Card and Bank Authorization (Direct Debit) Gifts transmittal report. Please label the EFT/CR# A, B, C... in the upper right-hand corner of the transmittal report.

For credit card donations, make sure the credit card number and expiration date are completed on the form. Also, remember we **do not** accept any Discover Card transactions.

For Bank Authorization donations, please make sure the donor has included a **voided check** for processing.

If a donor makes a down payment by check, please **include** the donor's original check with the transmittal. **DO NOT DEPOSIT IT** as it makes the processing of the donation more difficult.

DATA ENTRY PROCEDURES FOR PARISHES

Aiming for consistency within our database, we have established the following procedures for parishes when entering parishioners into the database.

The more information you provide, the more helpful it is for us to keep the database clean and have the most accurate and up-to-date information.

The diocese does not “delete” records. Deleting records also deletes any history of giving associated with the record. Instead, we mark them “inactive,” but we must also indicate the reason why: i.e. moved out of state, moved to another diocese, etc.

There are many variables as to why a parishioner may no longer attend your parish. Many of these former parishioners continue to contribute to the diocese and want to continue to receive mailings.

In the following sections of this manual, we give examples of what to do and what not to do.

Thank you for your assistance in helping to maintain an accurate and clean database.

TIP: *It is a benefit to the parish to encourage parishioners to use the personalized pledge card that they receive in the mail with Bishop's letter. This makes record-keeping easier for the parish and maintains a more accurate recording of donor gifts. The pledge card includes the amount given by the parishioner last year along with a suggested increase for them to consider giving this year.*

PROCEDURES FOR ENTERING PARISHIONER INFORMATION

Below are examples of various data fields required for new parishioners and how to enter the data using the correct format.

| DATA | INCORRECT | CORRECT |
|--|--|--|
| “and” instead of “&” in the title field | Mr. & Mrs. Jones | Mr. and Mrs. Jones |
| Periods after title abbreviations (Mr. and Mrs.), but not after Miss | Miss., Dr, Mrs, Mr | Miss, Dr., Mrs., Mr. |
| Data should be mixed case | MR. AND MRS. JONES mr. and mrs. Jones JUPITER, FL | Mr. and Mrs. Jones Jupiter, FL |
| Couples | Mr. and Mrs. John and Susan Jones Dr. & Mrs. John & Susan Jones Mr. & Dr. John and Susan Jones | Mr. and Mrs. John Jones Dr. and Mrs. John Jones Dr. Susan and Mr. John Jones |
| Directions in an address line should be abbreviated | 1455 North West Millpond Circle | 1455 NW Millpond Circle |
| Types of streets should be spelled out | St, Rd, Ct, Ter, Ln, Ave, etc. | Street, Road, Court, Terrace, Lane, Avenue |
| Abbreviations | Boulevard, Apartment, South West, North West, etc | Blvd, Apt, SW, NW |
| Names such as McDonald should NOT have a space after the Mc | Mc Donald, Mc Donough | McDonald, McDonough |
| Addresses that have apartment numbers should be abbreviated | 103 Main Street, Apartment C 103 Main Street Apartment C | 103 Main Street, Apt C 103 Main Street Apt C |
| No periods in address lines | P.O. Box 1111 1455 N.W. Millpond Circle | PO Box 1111 1455 NW Millpond Circle |

DATA ENTRY PROCEDURES FOR PARISHES *continued*

PROCEDURES FOR UPDATING PARISHIONER INFORMATION

When sending parishioner updates to the diocese, please provide as much information as possible. When marking a parishioner as deceased, please indicate who of Mr. and Mrs. is deceased. If the husband is the deceased person, please include the wife's first name if available.

| Incorrect | Correct |
|--|---|
| Mr. and Mrs. John Smith (Deceased) 100 Main Street Jupiter, FL 33458 | Mr. John Smith (Deceased) Mrs. Ann Smith (Widow) |
| Mr. and Mrs. John Smith (Deceased) | |

When sending updates to the diocese, include as many details as possible and the reason for the change (i.e. delete – moved out of state OR no longer a parishioner OR attends another parish, etc.)

| Incorrect | Correct |
|--|--|
| Mr. and Mrs. John Smith (delete) 100 Main Street Jupiter, FL 33458 | <p>Mr. and Mrs. John Smith 100 Main Street Jupiter, FL 33458 <i>Now attends another parish within the Diocese of Palm Beach</i></p> <p>Mr. and Mrs. John Smith 100 Main Street Jupiter, FL 33458 <i>No longer attends our parish – no further information available</i></p> <p>Mr. and Mrs. John Smith 100 Main Street Jupiter, FL 33458 <i>Seasonal resident – summer address is:</i> 1234 Main Street New York, NY 10232</p> <p>Mr. and Mrs. John Smith 100 Main Street Jupiter, FL 33458 <i>Seasonal resident – summer address not available</i></p> <p>Mr. John Smith 100 Main Street Jupiter, FL 33458 <i>No longer able to attend Mass</i></p> |

PARISH COMMUNICATIONS

ALL OF THE ART CAN BE FOUND ON THE DIOCESAN WEBSITE



Circle of
FAITH

*For
Leadership
Generosity
in
Pledging
\$2,500
or more*



Circle of
HOPE

*For
Leadership
Generosity
in
Pledging
\$5,000
or more*



Circle of
CHARITY

*For
Leadership
Generosity
in
Pledging
\$10,000
or more*



Circle of
JOY

*For
Leadership
Generosity
in
Pledging
\$25,000
or more*

DIOCESAN SERVICES APPEAL
PARTNERS

FAITH HOPE  CHARITY JOY