



# ADA 2016

---

Stewardship and Development

## **Gift Processor Training**

January 2016



# ADA 2016

Stewardship and Development

## Gift Processor Training Agenda

- **Prayer & Introductions**
- **ADA 2015 Results**
- **ADA 2016 Campaign Theme**
  - Rejoicing in God's Mercy, Together in Christ
  - Campaign Calendar
  - Pledge Materials
- **ADA 2016 Manual Overview**
  - Materials Distribution & Campaign Promotion
- **ADA Video**
- **Processing a Pledge & Bundling**
- **Sample Test of Pledge Processing**



# ADA 2016

Stewardship and Development

- **In House resources**

- Bill Matthews bmatthews@dsj.org (408) 983-0244  
*Director Stewardship and Development*
- Melanie Lara mlara@dsj.org (408) 983-0246  
*ADA Bookkeeper*
- Evan Linick elinick@dsj.org (408) 983-0294  
*System Support/Data Analysis Manager*
- Sue Pershon spershon@dsj.org (408) 983-0293  
*Administrative Assistant*



# ADA 2015 Results

## 1/1/2016 *(unofficial)*

Stewardship and Development

	2015	2014	Change
Goal	\$5,802,967	\$5,669,848	\$133,119
Pledged	\$8,093,959	\$7,856,625	\$237,334
Collected to date	\$7,804,512	\$7,543,475	\$261,037
Uncollected pledges	\$289,447	\$313,151	-\$23,704
Uncollected goal	-\$19,237	-\$39,437	\$20,200
Collected over goal/rebates	\$2,020,782	\$1,913,064	\$107,718
Donors	20,703	21,133	-430
Average Gift	\$390.96	\$371.77	\$19.19
Percent Participation	24.2%	24.86%	-0.7%



# ADA 2016

Stewardship and Development

## The ADA 2016 Campaign

- Theme this year is:  
*“Rejoicing in God’s Mercy, Together in Christ”*
- 2016 Goal: \$5,943,885
- Calendar (pages 3-5 in ADA Manual)
- Pledge Materials Handouts (show & tell)



# ADA 2016

Stewardship and Development

## A Closer Look at the ADA Manual

(pages 5 & 6)

- Direct Mail
- In Pew
- Announcements
- Tabling
- Second Mailings
- Goals
- Follow-up Administrator
- Make it Public
- Thank Your Donors



# ADA 2016

Stewardship and Development

## A Closer Look at the ADA Manual

### **Pledge Facts & FAQs (page 7)**

- Pledge Online – *the easiest for the Donor and you*
- Pledge with check, CC and direct debit too
  - Reminders sent for pay by check donors
- For gifts of stock (see page 33)
- Pledges can be made in 10 Monthly payments and must be completed by 12/31/2016
- Pledges of Prayers count!



# ADA 2016

Stewardship and Development

## A Closer Look at the ADA Manual

Pledge Facts & FAQs (pages 9-12)

***Why is the ADA  
important?***





# ADA 2016

---

Stewardship and Development

## *The ADA Video*



# ADA 2016

Stewardship and Development

## Gift Processing

(Pages 27-28)

- Pledge form
- Pledge remit envelope for in-pew
- Bundling
- Filling out transmittal reports
- Test time



# Pledge Payments

Stewardship and Development

## Cash and Check Transmittal

- How many one-time gifts?
  - What is total amt. one time gifts?
- How many pledges without payment?
  - What is total amt. pledges without payment?
- How many pledges with first payment?
  - What is total amt. pledges with first payment
  - What is the total paid amount of first payments

## Credit Card & Direct Debit

- How many one-time credit card gifts?
- How many installment credit card gifts?
- How many installment direct debit gifts?

***Are there donations that are not put on the transmittal forms?***



Diocese of  
San Jose

# ADA 2016

## Stewardship and Development

Annual Diocesan Appeal 2015	
1150 N First Street, Suite 100 San Jose, CA 95112 Phone: 408.983.0246; Fax: 408.983.0290	
<b>Credit Card and Direct Debit Electronic Transmittal Form</b>	
Date: <u>1/5/16</u> Report Number: <u>1</u> Parish Number: <u>100</u> Parish Name: <u>100</u> City: <u>San Jose</u>	
<b>Gift Amount by Type</b> Do not include cash or check gifts on this form. Please use the Cash and Check Transmittal Form.	
Number of One-Time Credit Card Gifts: <u>1</u>	Total Amount: \$ <u>1,000.00</u>
Number of One-Time Direct Debit Gifts: <u>0</u>	Total Amount: \$ <u>0.00</u>
Number of Installment Credit Card Gifts: <u>2</u>	Total Amount: \$ <u>2,000.00</u>
Number of Installment Direct Debit Gifts: <u>2</u>	Total Amount: \$ <u>2,200.00</u>
Total Number of Gifts: <u>5</u>	Total Amount: \$ <u>5,200.00</u>
Name: _____ Phone: _____ Email: _____	
<b>FOR ADA USE ONLY</b>	
Date Received: _____	Date Processed: _____ Batch #: _____
Processed By: _____	Signature: _____
Please retain bottom copy for your records.	

Annual Diocesan Appeal 2015		
1150 N First Street, Suite 100 San Jose, CA 95112 Phone: 408.983.0246; Fax: 408.983.0290		
<b>Cash &amp; Check Transmittal Form</b>		
Date: <u>1/5/16</u> Report Number: <u>1</u> Parish Number: <u>100</u> Parish Name: <u>100</u> City: <u>San Jose</u>		
<b>Gift Amount by Type</b> Do not include credit/debit card gifts on this form. Please use the Electronic Transmittal Form.		
Number of One-Time Gifts: <u>2</u> A	Total Amount of One-Time Gifts: <u>115.00</u> B	
Number of Pledges Without Payment: <u>2</u> C	Total Amount of Pledges Without Payment: <u>1,250.00</u> D	
Number of Pledges With First Payment: <u>2</u> E	Total Amount of Pledges With First Payment: <u>1,100.00</u> F	
Total Paid Amount of First Payments: <u>110.00</u> G		
Total Number of Gifts: <u>6</u> A+C+E	Total Amount of Gifts and Pledges: <u>2,465.00</u> B+D+F	Total Paid this Week: <u>225.00</u> B+G
<u>1</u> Number of one-time gifts in exchange for check # <u>122</u> for \$ <u>15.00</u> <u>1</u> Number of first payment in exchange for check # <u>123</u> for \$ <u>10.00</u>		
Name: _____ Phone: _____ Email: _____		
<b>FOR ADA USE ONLY</b>		
Date Received: _____	Date Processed: _____ Batch #: _____	
Processed By: _____	Signature: _____	
Please retain bottom copy for your records.		



# Did you know?

Stewardship and Development

- A weekly internal ADA newsletter is delivered during the active campaign phase and once a month through December
- Real time ADA reports are available through ParishSOFT ConnectNow . Call Evan Linick for details



# ADA 2016

Stewardship and Development

## ADA Tools and Resources

### Available on the web

- Video
  - <http://www.dsj.org/ways-to-give/annual-diocesan-appeal/>
- Brochure
- Logos
- Manual
  - <http://www.dsj.org/ways-to-give/annual-diocesan-appeal/ada-resources/>



# ADA 2016

---

Stewardship and Development

Questions?

Concerns?

Winning Lottery Tickets?



# ADA 2016

Stewardship and Development

- **In House resources**

- Bill Matthews bmatthews@dsj.org (408) 983-0244  
*Director Stewardship and Development*
- Melanie Lara mlara@dsj.org (408) 983-0246  
*ADA Bookkeeper*
- Evan Linick elinick@dsj.org (408) 983-0294  
*System Support/Data Analysis Manager*
- Sue Pershon spershon@dsj.org (408) 983-0293  
*Administrative Assistant*