Gift Processor Training

January 2016
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
• **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)

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**Stewardship and Development**

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

Pledge Facts & FAQs (pages 9-12)

Why is the ADA important?
The ADA Video
Gift Processing

(Pages 27-28)

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

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?
### Annual Diocesan Appeal 2015
1150 N First Street, Suite 100
San Jose, CA 95112
Phone: 408.983.0246; Fax: 408.983.0290

#### Credit Card and Direct Debit Electronic Transmittal Form

<table>
<thead>
<tr>
<th>Date</th>
<th>Report Number</th>
<th>Parish Number</th>
<th>Parish Name</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/6/16</td>
<td>1</td>
<td>100</td>
<td>San Jose</td>
<td></td>
</tr>
</tbody>
</table>

**Gift Amount by Type**

- Do not include cash or check gifts on this form. Please use the Cash and Check Transmittal Form.

<table>
<thead>
<tr>
<th>Number of One-Time Credit Card Gifts</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$1,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of One-Time Direct Debit Gifts</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>$0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of Installment Credit Card Gifts</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>$2,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of Installment Direct Debit Gifts</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>$2,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Number of Gifts</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>$5,000</td>
</tr>
</tbody>
</table>

**FOR ADA USE ONLY**

- Date Received:
- Date Processed:
- Batch #:
- Processed By:
- Signature:

Please retain bottom copy for your records.

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<td></td>
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</tbody>
</table>

**Gift Amount by Type**

- Do not include credit/debit card gifts on this form. Please use the Electronic Transmittal Form.

<table>
<thead>
<tr>
<th>Number of One-Time Gifts</th>
<th>Total Amount of One-Time Gifts</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>$1,050</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of Pledges Without Payment</th>
<th>Total Amount of Pledges Without Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>$1,050</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of Pledges With First Payment</th>
<th>Total Amount of Pledges With First Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>$1,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Paid Amount of First Payments</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>11 00</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Number of Gifts</th>
<th>Total Amount of Gifts and Pledges</th>
<th>Total Paid this Week</th>
<th>Total Paid this Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>16</td>
<td>$1,065 00</td>
<td>$325 00</td>
<td>$2,325 00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of one-time gifts in exchange for check #</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$1,050 00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of first payment in exchange for check #</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$1,000 00</td>
</tr>
</tbody>
</table>

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Please retain bottom copy for your records.
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 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/
Questions?
Concerns?
Winning Lottery Tickets?
• **In House resources**

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