PDS Stewardship Library of Reports

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Stewardship Library of Reports

This guide helps your parish accomplish evangelization and stewardship at the same time. There are many people who are not "active" in the parish (meaning they don't go regularly), and there are others who are active but aren't involved in the life of the parish. Often, there are legitimate reasons for this: A large family to care for, working more than one job, feeling burned out, and so on. However, there are a number of members who attend regularly who haven't considered being involved in parish ministry or who haven't been asked.

We believes it's part of our ministry to help you use technology to minister to your people. For this purpose, we have developed a process for evangelizing your local community through stewardship. The PDS Church Office program comes equipped with reports, sample letters, labels, payment booklets, and many other tools that help you use member information to initiate a ministry and stewardship campaign to those enrolled at your parish.

Over the past few years, a number of writers have developed the concept of sacrificial giving. These authors speak of a sacrificial giving of "time, talent, and treasury", that is, ministry and financial support. This approach seems to have struck a responsive chord in many parishes.

Research has shown that the more members involved in the ministerial life of the parish, the more likely they are to contribute on a regular, consistent basis. Indeed, a family where both husband and wife are actively involved, on average, gives considerably more than a family where only the husband or wife is involved in ministry. Each member possesses unique talents and gifts that can be used to benefit the parish community and the community as a whole. Members who participate begin to feel more involved and care more than those who aren't involved in stewardship. Active participation sparks people to feel more at ease with the parish and to feel a sense of community.

Parishes should therefore center attention on inviting people to ministry. However, we realize that many parishes, while seeing the need for ministry, are in a real money crunch. Funds just aren't coming in, while expenses are growing. And, while they'd like to work on the ministry side of stewardship, it's the money side that needs to be addressed, sometimes immediately.

This module addresses both ministry and sacrificial giving. You can use both sections together to implement a full stewardship program, or you can use one section independent of the other. We made this library as flexible as possible so that you can use the power of Church Office in conjunction with one of the many popular stewardship programs which are already out there, or with a method you develop yourself.

It's important to treat stewardship as an ongoing process rather than a one-time project. The constant turnover of parishioners in our mobile society means that you'll be losing valuable volunteers all the time, but you can gain other members with equally valuable talents. In addition, experience has shown that only 10 to 20 percent of members participate in stewardship activities at the initial introduction. Many people need time to get used to the idea and need a second chance to participate.

The PDS Stewardship Library of Reports is a tool you can use to help with the overwhelming task of contacting your membership and keeping track of volunteers. Each stewardship process is different because the needs of each parish are different. Some parishes hold time and talent fairs every year to encourage members to sign up, while others have annual renewals of sacrificial giving or tithing. But certain things always need to be done, and that's where this library can help. You can use these reports to track stewardship of time, talent, and sacrificial giving.

List of Reports

The Stewardship Library of Reports menu is shown below. On the Reports tab, click **All Reports** > **Stewardship**, and expand the menu items. The menu is divided into three parts:

Ministry – Time and Talent

- Preparation
    - Usage Worksheet
    - List of Members
- Communication – Family
    - Letters
        - Stewardship of Time and Talents
        - Response Form and Letter
        - Blank Response Form and Letter
    - Label/Envelope Reports
        - Family Label
        - Family Envelope
- Communication – Member
    - Letters
        - Introductory Letter - Those Not Involved
        - Introductory Letter - Active in Ministry
        - 2nd Letter - Those Not Involved
        - 2nd Letter - Active in Ministry
        - Positive Response - Those Not Involved
        - Positive Response - Active in Ministry
        - Negative Response - Those Not Involved
        - Negative Response - Active in Ministry
        - No Response - Those Expected to Reply
        - No Response - Those Not Involved
        - No Response - Active in Ministry
    - Label/Envelope Reports
        - Member Label
        - Member Envelope with Barcode
    - Worksheets
        - Personal Visit Worksheet
        - Blank Personal Visit Worksheet
    - Lists
        - Listing of Ministry for Reference
- Evaluation
    - Ministry Statistics
    - Ministry Involvement Date Comparison

Financial – Treasure

- Preparation
    - Demographic and Financial Info
    - Monthly, Quarterly and Yearly Totals
    - Breakdown Analysis by Amount Given
    - Breakdown Analysis by Percentage
    - Comparison by Week and Year
    - Worksheet for Pledge Entry

- Communication
    - Letters
        - Intro Letter
        - 2nd Letter
        - Thank You
        - No Response with Special Paragraphs
        - Progress Report
        - Follow Up Letter - No Response
    - Pledge Cards
        - Pledge Card with Prior Pledge Info
        - Blank Pledge Card
    - Worksheets
        - Personal Visit Worksheet
        - Blank Personal Visit Worksheet
    - Payment Booklet
        - Capital Fund Campaign Payment Booklets
        - Cover for Payment Booklets
- Evaluation
    - Goal Statistics
    - Individual Pledge and Payment
    - Pledge Progress Breakdown
    - Projection of Yearly Comparison
    - Yearly Comparison of Pledge/Payments
    - List of Lost Pledgers
    - List of Lost Givers

Combine Time, Talent, and Treasure

- Family Financial and Ministry Info
- Pledge Form with Ministry Info
- Blank Pledge Form
- Breakdown by Involvement

As you go through this process the first time, you develop some history that makes the next time much easier. We suggest you keep a record of the things you did in each step of the process and refer to these notes each year. The more accurate your records, the greater chance you have for success the following year.

This stewardship program can help you with many aspects of developing ministry in your parish, but only you and a ministry committee can make it work and give it meaning.

Stewardship of Time and Talent

The Stewardship of Time and Talent can be broken down into four parts:

Part 1: Preparations — Determine the goal of your stewardship program. The Usage Worksheet prints the numbers in each ministry, and the List of Members prints a list of names in each ministry. Determine the accuracy of your data, analyze the results, and if needed, make corrections to your data.

Part 2: Develop a Plan of Action — Decide how you want to contact your membership. Gather your key people to help you.

Part 3: Communication — Develop letters you want to use as initial contact, follow-up letters for those who haven't yet responded, and thank you letters.

Part 4: Evaluation of Progress — Run reports that give you a clear picture of your stewardship program in progress. Use these reports to analyze how things are going.

Part 1 - Preparations

You should spent a lot of time preparing for a successful campaign. The Stewardship Library of Reports is a helpful tool during the planning process. When deciding your objective, use the following guidelines:

Clarify the purpose of this process

What is the goal of the program?
Who do you want to attract?
Why do you want to start the program?
When do you want to complete the program?

Gather information

Run reports which portray current involvement in ministry.
Analyze reports on numbers and types of involvement.
Is there solid information about ministry in Church Office?
Identify key people in ministry.

Consultation

Call together a group of key people.
Define the What, Who, Why, and When of the program.
Write up your plan of action.

Ministry committee

Develop a timeline.
Review and decide what material you want to send to parish members.
Suggest names of those who will give witness talks on the weekends.
Compose the bulletin announcements.
Review the letters to be mailed.
Aid in organizing the Ministerial Gathering.
Give input for the weekend homilies.
Design the Commitment Cards and decide how the returns are recorded.
Invite volunteers to work on projects such as mailings, the Ministerial Fair, follow-up calls, and so on.

Decisions to make

Are you going to print your own personalized letters? Do you want to compose the letters using Church Office or your regular word processor?

You can manage the process either way, though the easiest and most direct way is through Church Office.

Will you use a professional printer to print the letters? This is not recommended because the letters are not personalized; however, it does save a lot a time. We feel that being personal is worth the time and energy, which means signing all the letters or using a bitmap signature.

Are you using first class or bulk mail? If you're using bulk mail, it's essential that some material arrive at each home before the weekend which is centered on that material. Can you guarantee arrival using bulk mail? It might be worth the extra cost to mail first class during this program.

We included some sample letters in PDS Church Office. Spend time personalizing them, or better yet, compose your own. We suggest giving them to the Stewardship Committee for input. No matter how thorough you think you are, you might forget to include something, and it's better to find out before the letters are sent. Make them as personal as possible, referring to the ministerial and financial needs of your own parish.

Decide who will be responsible for inputting the information once the cards are returned. Then determine when this will be done, how often you want to send follow-up reports to everyone, how to invite new parishioners to participate in the program, and finally, how to develop a yearly follow-up/renewal of commitment.

Data Investigation

Before you begin, you should verify the accuracy of your existing data. The stewardship process relies heavily on the ministry information entered on each member's record. Therefore, before you begin with a new stewardship process, print out your existing member ministry information and check it for accuracy to make sure it reflects current information.

To do this, use the two worksheet reports in the Stewardship Library of Reports. In the Select Report window, click **Stewardship** > **Ministry – Time and Talent** > **Preparation**. These reports automatically group members by the ministry information currently entered in the records. It provides statistics and lists of those involved in ministry. Use the reports to analyze the results of current data. Then, if needed, make corrections or additions to the information.

Usage Worksheet

The Usage Worksheet report prints an alphabetical list of all ministries and, for each ministry, it tallies all of the statuses and records how many members in each status are active, inactive, not interested, and so on. If you have kept this information current, it shows how many are active or inactive, how many are designated as chair people, and so on. This helps you get an overview of the number of different ministries and also the number and degree of involvement by the members in your parish.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Preparation** > **Usage Worksheet**.

Tip

If you haven't kept good records for ministries or if you don't have any records, you need to identify your parish's ministries and the people involved. Enter that information before you do anything else.

Distribute the pages of this report to office staff and to key members in each ministry and have them give instructions concerning this information. Give them a deadline to return the forms to the parish office. Use these forms to update your ministry records.

Parish Data System, Inc.
Usage Worksheet

	Blank (I)	Actively Involved (I)	Chairperson (I)	Interested (N/I)	Needs/Pending (N/I)	Needs/Responded To (N/I)	No Longer Involved (N/I)	Volunteered (I)	Total	Delete / Retain
Altar Server	0	8	0	0	0	0	9	1	18	
Baby Sitter	0	0	0	0	0	0	0	0	0	
Baptism Team	0	1	0	0	0	0	0	0	1	
Choir	0	16	0	4	0	0	5	2	27	
Choir/Spanish	0	0	0	0	0	0	0	0	0	
Christian Communities	0	0	0	0	0	0	0	0	0	
Deacon	0	2	0	0	0	0	0	0	2	
Eucharistic Minister	0	4	0	0	0	0	0	0	4	
Finance Committee	0	8	1	4	0	0	1	0	14	
Fund Raising	0	2	0	0	0	0	0	0	2	
Hospitality	0	4	0	5	0	1	0	1	11	
Ladies of Charity	0	1	0	0	0	0	0	0	1	
Lector	0	5	0	2	0	0	3	0	10	
Lector-Spanish	0	0	0	0	0	0	0	0	0	
Lector-Youth Mass	0	0	0	0	0	0	0	0	0	
Liturgy	0	0	0	0	0	0	0	0	0	
Liturgy Committee	0	2	1	0	0	0	0	0	3	
Minister of Prayer	0	0	0	0	0	0	0	0	0	
Minister to the Sick	0	0	0	0	0	0	0	0	0	
Money Counter	0	1	0	1	0	0	0	0	2	
Music	0	0	0	0	0	0	0	0	0	
Religious ED Teacher	0	1	0	0	0	0	4	0	5	
Room Mother	0	0	0	0	0	0	0	0	0	
School Board	0	2	0	0	0	0	1	0	3	
Scouting	0	7	1	1	0	0	2	0	11	
Teen Group	0	1	0	0	0	0	1	0	2	
Usher	0	4	0	0	0	0	0	0	4	
Visit the Sick	0	1	0	0	0	0	0	7	8	
Welcome Committee	0	3	0	0	0	0	0	0	3	
	0	73	3	17	0	1	26	11	131	

(I) - Members with this status are considered 'Involved'.
(N/I) - Members with this status are considered 'Not Involved'.

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The column on the right side is used to indicate if the ministry should be Retained or Deleted. The decision to do either one should be based on analysis of this report. Write either "Delete" or "Retain" for each ministry. Delete means that this ministry keyword is no longer needed and should be removed from the keyword list. Retain means that this keyword is used in this process to increase participation in ministry.

Analyzing of Usage Report

These are a few ideas that demonstrate how you might analyze the Usage Report.

"Christian Communities" has zero entries.

Does that mean we no longer have anyone involved?
Does it mean it's no longer used? Do we need to expand on the idea of a Christian Community?

"Eucharistic Minister" has four entries.

Does that mean we have that few entries or have we not been keeping the records up to date?

"Finance Committee" has 14 entries.

What has been done about the four who expressed interest? Is that the correct number of entries?

There are a number of ministries with zero entries.

Is it true no one is involved in these areas?
Should some of these groups be dropped or merged?

These are examples of the types of questions that this report could generate.

List of Members

The List of Members report is a list of those involved in a specific ministry according to status. Use this report as part of a follow-up process to verify the accuracy of the information and the interest level of the members. Give this report to a follow-up committee so they can verify whether a member is active or inactive.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Preparation** > **List of Members**.

Tip

This worksheet is intended to provide you with information about the current status of each person in each ministry. Before proceeding with this portion of the program, you must know that your records are accurate. For example, if you have ministries that are no longer being used, the members who are still listed in that ministry need to be corrected.

This list could serve as a worksheet for key members in each ministry to use for verification purposes.

- Is the person on the list still active or not?
- Does the person want to continue being active? Or do they want to be removed?
- Do they need additional information?

Once these lists have been passed out to key people for follow-up purposes, you can begin correcting the data.

Updating Keyword and Member Records

After the lists have been returned, you need to update member records and the Ministry Keyword list with the results. For example, you found that "Eucharistic Minister" is misspelled or that "Fund Raising" is no longer used as a ministry.

Adding, Editing, Deleting, and Combining Keywords

On the File menu, click **Keywords** > **Member Keywords** > **Ministry Names**. Refer to your Keyword Worksheet report to determine what changes you need to make.

> ⚠ **Note**
>
> Any changes you make here affect all members who currently use those ministries.

- Click the add icon + to add new ministries to the list.
- Click any line to edit existing ministry names.
- Click the delete icon − to remove old or unused keywords.
- Click **Combine** to combine two names that refer to the same ministry. For example, if you have "Baby Sitter" and "Baby Sitting" in the list, combine these ministries to clean up the keyword list.

Changing Ministry Information

Example: In examining your records, you discover that members of the choir are all listed as "Active" when in fact some have dropped out and some new ones haven't been added yet.

To make changes for an individual member's ministries, you can edit the information on the member record. To make changes for a particular ministry group all at once, in the Members navigation pane, click **Quick Posting**.

Example: Members of the choir have all been contacted and most of them want to remain active. A few of them don't want to continue in the choir. You want to update records without having to go to each member record and make the changes.

To select a group to make changes to:

1. On the Additional Selections tab, click **<Click here to add new condition>**.
2. In the drop-down list of fields, select **Ministries**, select **equal to**, and select **Choir**. Click **Next.**
3. Select the ministry you want to update **- Choir**. Select the status and start date. Click **Next.**
4. The list of choir members displays. If you don't want to update a member's record (such as the active choir members who were already added), clear the checkbox beside the name. Click **Next**.

   > ⓘ **Useful Information**
   >
   > To add members who aren't already in this list, click **Add Member to List**.
   >
   > You can update the term in the Ministry, Status, and Start Date columns to reflect any additional changes for members in this list.

5. To post the changes, click **Finish**.
6. Repeat this for each ministry list you need to change. When you're finished, your ministry data is ready to use for the next part of the stewardship process.

Part 2 - Plan of Action

This section is a reminder that, before you begin to send out letters, you need to have a plan of action. Here are a few suggestions that you might consider in your approach to increased involvement in ministry.

Developing Ministry Awareness

Ministry Fair — This can heighten awareness among all the membership concerning the number and variety of ministries already performed by members of the parish. Representatives for each ministry are invited to set up a display booth that advertises and explains their particular ministry. Designate a given weekend as Ministry Sunday and invite other members to come and investigate active ministry within your parish.

Ministerial Gathering — All active ministers in the parish are invited to this gathering as an expression of thanks for their ministry and as an opportunity of sharing with one another about the blessings they've experienced from their ministry. This could be an opportunity for all to come together for thanks, encouragement, and as an opportunity for each member to walk out with a packet of information about ministry. These people could become active recruiters.

Announce the Invitation to Ministry — Though this step is optional, it can serve as a way to introduce the process to the community and to invite active ministers to the Ministerial Gathering. Mail letters announcing the Invitation to Ministry to all members of the parish on file. This should be just before or after the first weekend of the program. The same letter can be sent to everyone, or a separate letter can be sent to non-ministers and to those actively involved in ministry.

Five Week Program

Week One

Announcement at each weekend service.
Explanation of the program and the elements involved.
Invitation to reflection and prayer for discernment of commitment to ministry.
Bulletin insert for home study, reflection, and prayer.
Begin creating any letters you will send using the Stewardship Library of Reports menu.

Week Two

Announcement at each weekend service.
Bulletin insert for home study, reflection, and prayer.
A "Ministry Gathering" or party.
Personal contacts by current ministers inviting parish members to ministry. Update member records from return cards.

Week Three

Explanation and/or witness at each weekend service.
A "Ministry Fair" available after every service where members can talk to those involved in ministry and see the opportunities for ministry in the parish.
Bulletin insert for home study, reflection, and prayer and/or mailing containing material for reflection. This can include a list of available ministries along with an invitation to reflect on other possible ministries.

Week Four

Explanation and/or witness at each weekend service.
Mail the letter and Commitment Card to those who weren't personally contacted.
Use the Response Form & Letter found under **Reports** > **Stewardship** > **Ministry – Time and Talent** > **Communication – Family** > **Letters**.

Week Five

Return cards at weekend services.
Ceremony of Commitment at each service.
Update member records.
Send letters to all of those in your parish giving results of the program.

Follow-Up

Every volunteer gets contacted by a designated person or persons representing the ministry for which he/she volunteered.
The Ministry Committee should decide what to do regarding members who haven't returned cards.
On-going process of inviting new parishioners to ministry as being part and parcel of parish membership. This is especially true for all new members who register before the next Invitation to Ministry scheduled for the following year.

Part 3 - Communication

Identify Members to Contact

In gathering information, you've probably identified those people you especially want to invite to ministry. This section describes how those members and all other members are identified within PDS Church Office.

Once you decide upon the different types of ministry that are needed in your parish, you need to identify them by name and also the manner or method you will use to contact them. For example, if you need more Lectors, you need to make sure there is a term for that ministry (Lector).

It's important to mark all members in the Church Office program who will be contacted by using a special keyword, Lector, that will identify each member who is participating in this Invitation to Ministry. By marking these members, you can easily print lists, letters, and labels, and use special utilities for only those members.

Who is Invited?

Is this invitation going to every member, certain groups, or selected members? Knowing who will receive the invitation makes it easier to update that member's record. For example, is the invitation going to every adult over the age of 20? Is there going to be a special ministry program for high school students? For elementary school students above 3rd grade? Clarify these considerations before you begin quick posting.

Invite the Members to Ministry

The next step is to contact the members and invite them to ministry. You can do this by letter, by phone, by a personal visit, or a combination of these.

The way you contact ministers who are already actively engaged in ministry will probably differ from the way you contact those who are not currently involved. This can mean a special evening devoted to the subject of ministry with speakers and discussion, or a Ministry Fair, or even a combination of both ideas. If you are inviting by letter, you might want to compose one letter for those currently involved and another for those not involved.

Selecting a Letter

The Stewardship Library of Reports includes sample letters that can be modified to more accurately suit your parish. With the letters under **Communication** > **Family**, you can create and send letters to your membership addressed to the family. This can save time and money by sending a single letter to each household instead of multiple letters addressed to each member in the family. This is especially helpful when sending out the initial letter announcing your stewardship program. If you create brochures or detailed information about stewardship that you want to distribute throughout your membership, you could address it along with a letter of your own design to the families. This cuts down on the number of brochures you have to produce and reduces your costs for postage (as compared to sending duplicates to each member in the family).

Once you have identified those members you want to have further contact with, you can start addressing members individually by name. By using member letters, found under **Communication** > **Member**, you can develop a variety of letters that can be used in every step of this process. You can print one letter to send to all the members you're inviting, or print different letters to be sent to certain groups using Additional Selections. We've included a number of sample letters that you can modify to better fit your needs. Remember, you can make modifications to the wording of the letters, and develop as many of your own letters as you want.

Bulk Mailing is an Option

The U.S. Postal Service provides a discount to those who mail a number of pieces at the same time and who do some of the work by sorting the mail. You might explore this option when you are mailing letters to your membership. You are required to have the ZIP Codes certified within a six-month period before a mailing if you are going to use barcodes. This is called CASS (Coding Accuracy Support System) certification. This means having all ZIP Codes in your database checked and corrected by an authorized source. To take advantage of an additional discount you must be certified within 90 days of the mailing and include the postal line of travel information (LOT) in the ordering of the pieces of mail. This low rate, called the Enhanced Carrier Route Rate, is not available in every ZIP Code. If you want to take advantage of this lower rate, make sure those who CASS Certify your data put in the line of travel (LOT) information.

Before you do a bulk mailing, you must take care of Postal Service forms and fees. This can take some time, so don't wait until the last moment. In addition, there are some questions you need to answer before you check with the Postal Service:

- Which class do you intend to use: First Class or Standard Class?
- Are you going to print barcodes to get an additional discount?
- What postage method should you use: precanceled stamps, Permit Imprint, or Postal Meter?

Taking advantage of Bulk Mailing discounts can mean a significant savings on mailings containing a large number of pieces. However, it also means that you will have to do more work before taking your mail to the Post Office. PDS can help with the bulk mailing process in the following ways:

- You can check the addresses for common errors before running CASS Certification.
- Use the CASS It! Certification feature to verify bulk mailing addresses.

  > **Useful Information**
  >
  > PDS is authorized by the U.S. Postal Service to do CASS Certifications.

- The PDS EZ-Mail feature can be used to print letters and labels from the Stewardship Library of Reports. This makes it easier for you to perform the complex steps required to prepare a mailing at discounted postage rates. As it prints your letters or labels, it automatically sorts them into the order required by the Post Office to qualify for a discount.

Letters

This section contains a series of letters you can use to communicate the message about increased ministry in the parish. The letters are samples that can be used, modified, or rewritten. After you select the proper letter to send to your members, you need to select the audience you want to send this message to. Once you determine who will receive the letter, you can update the record of each member who receives the letter.

Introductory Letter - Those Involved

This is an introductory letter sent to those families who have someone involved in ministry. It's designed to inform them about the new program to increase awareness of parish ministry; it's a letter of invitation. This letter also contains a listing of each family member's involvement in ministry. You can modify the letter to mention something about enclosed materials or a card that they should fill out and return.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Family** > **Letters** > **Stewardship of Time and Talents**.

Useful Information

If you prefer to send letters and address them individually to members in your parish instead of sending letters addressed to the family, you could use one of the Stewardship Member letters described on the next few pages. Remember, it will save you some time and money if you send correspondence to the family. Once you start dealing with individuals, it's more personal to send letters addressed to the specific member name you are contacting.

After you print the letters, you are prompted to make an entry on the family's record. We suggest that you log the letters you send for stewardship to make it easier to identify families for future mailings.

Tip

The Note field is most useful for notations when receiving responses to the letter later on.

The information you enter is logged in the Families window.

Introductory Letter - Those Not Involved

This letter is addressed to individual members who aren't involved in ministry instead of to the whole family unit. It's designed as a first communication with your membership about the plan to increase involvement in ministry; it's a letter of invitation. You can modify the letter to mention enclosed materials or a card that they can fill out and return.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Member** > **Letters** > **Introductory Letter– Those Not Involved**.

Useful Information

To print this letter only for members who aren't yet active in any ministry, you must enter some information on the Additional Selection tab, which is located in the last window of the Report wizard. Add a new condition where **Mem. Active Ministries** is equal to ______ (leave the field blank).

After you print the letters, you are prompted to make an entry on the member's record. We suggest that you log the letters you send for stewardship to make it easier to identify members for future mailings.

Tip

The Description field is short, so you may need to abbreviate.

The information you enter is logged in the Members window.

Introductory Letter - Active in Ministry

This letter is addressed to individual members who are involved in ministry instead of to the whole family unit. It's designed as a first communication with your membership about the plan to increase involvement in ministry; it's a letter of invitation. You can modify the letter to mention enclosed materials or a card that they can fill out and return.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Member** > **Letters** > **Introductory Letter– Active in Ministry**.

Useful Information
To print this letter only for members who are currently active in any ministry, you must enter some information on the Additional Selection tab, which is located in the last window of the Report wizard. Add a new condition where **Mem. Active Ministries** is not equal to ______ (leave the field blank).

After you print the letters, you are prompted to make an entry on the member's record. We suggest that you log the letters you send for stewardship to make it easier to identify members for future mailings.

Tip
The Description field is short, so you may need to abbreviate.

The information you enter is logged in the Members window.

Response Form and Letter

Once you send invitations, you can follow with a second letter as a follow-up to the invitation letter. This letter makes a specific request of the member to commit to a specific ministry. If you want to send a single letter to each family that includes the response form for the family members, you can use the Response Form and Letter report.

This report includes a combined response form with a family letter and several sample member letters that you can send to follow up on the original invitation. You can also include a commitment card that lists the ministry areas they can participate in, and if you want, request that they use the card to return as a response.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Family** > **Letters** > **Response Form and Letter**.

After you print the letters, you are prompted to make an entry on the member's record. We suggest that you log the letters you send for stewardship to make it easier to identify members for future mailings. The information you enter is logged in the Members window.

Blank Response Form and Letter

There is a blank Response Form and Letter which can be kept on hand if a family needs another copy of the letter or form. These can be used in mailings; however, a more personalized letter and form are suggested.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Family** > **Letters** > **Blank Response Form and Letter**.

2nd Letter - Those Not Involved

This report can be sent to those members who haven't signed up for a ministry and have already received the first letter.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Member** > **Letters** > **2nd Letter– Those Not Involved**.

> **Useful Information**
>
> To print this letter only for members who aren't yet active in any ministry and received the first letter (logged as Introductory Letter - Not Inv), you must enter some information on the Additional Selection tab, located in the last window of the Report wizard. As long as you have been logging the letters as you send them, this is easy to do. Add a new condition where **Mem. Active Ministries** is equal to ______ (leave the field blank), and add a condition where **Letter Description** is equal to **Introductory Letter - Not Inv**.

After you print the letters, you are prompted to make an entry on the member's record. We suggest that you log the letters you send for stewardship to make it easier to identify members for future mailings. The information you enter here is logged in the Members window.

2nd Letter - Active in Ministry

Use this report as a second letter to those who are currently active in one or more ministries. You can and should modify this letter to convey your parish's message with more of a personal touch. Only your parish knows the best way to reach your members.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Member** > **Letters** > **2nd Letter– Active in Ministry**.

> **Useful Information**
>
> To print this letter for members who have active ministries and received the first letter (logged as Introductory Letter - Active), you must enter some information on the Additional Selection tab, which is located in the last window of the Report wizard. As long as you have been logging the letters as you send them, this is easy to do. Add a new condition where **Mem. Active Ministries** is not equal to ______ (leave the field blank), and **Letter Description** is equal to **Introductory Letter - Active**.

After you print the letters, you are prompted to make an entry on the member's record. We suggest that you log the letters you send for stewardship to make it easier to identify members for future mailings. The information you enter here is logged in the Members window.

Entering Responses in the Office Program

As members begin returning the commitment cards, you need to enter the information into Church Office. In the Letter window, post whether it was a positive or negative response to the letter. If the response is positive, enter the ministry they want to be involved in on the Member Ministries window.

It's just as important to post the negative responses into Church Office as it is to post the positive ones. You should have far less negative responses than you will have positive responses or no responses at all, so the best way to process these negative responses is to go to each member's record and enter the response directly. However, if you have a specific group of members to update, you can use the Change Letters, Etc process with the following selections:

- **Description** — Enter the name of the letter you sent.
- **Type** — Enter the type logged for the letter.
- **Date** — Enter the date you sent the letter.

To use the entire group of members with the letter logged, select **Post Changes for All Members**. To narrow the group to only those who are currently actively involved in a certain ministry, add a condition where **Mem. Active Ministries** is equal to (enter a ministry).

In the **Type** field, change the information to reflect the members' responses. In the **Note** field, enter any additional information. Be sure to select the checkbox next to each member you want to post information to.

Entering Ministries in the PDS Office Program

There are two ways to get ministry information into the program: You can make entries for each member in his or her individual record, or you can process a group of members. Individual entry works great for updating information, but it can be time consuming if entering information for more than a few members. A group can be updated using the Ministries quick posting as described below.

This quick posting provides a fast method of posting ministries in the member's Ministries/Talents window. Posting is done either for individually selected members or for a group of members that have something in common.

Automatic Updating

Select Automatic Updating when you want to specify a group of members and assign the same ministry information to all. You can then make changes to individual entries, if you need to, before posting the information to the group.

Add a new condition where **Keywords Description** is equal to (enter a member keyword).

> ⚠ **Note**
> This quick posting adds new entries to the Ministries/Talents window. It does not modify existing entries nor does it check for duplicates. Use the Change Ministries process if you want to change existing entries or delete them from the member's Ministries/Talents window.

Individual Entry

Select individual entry if you are working from a list of members where there is no common piece of information you can use to automatically select those members.

Enter the ministry information to assign to the member. As you select members, you can leave this information the same, or you can change it for the different members. You can select the same member with a different ministry in order to post more than one ministry to the same member.

Quick Posting List

> ⓘ **Useful Information**
> - An asterisk by a member's name indicates that their last name is different from the family's last name.
> - Inactive members display in red.

You can make changes to the ministry information in the following ways:

- Click the entry in the list and manually enter the change.
- Double-click the line to load the information. Make the changes and click **Back** to return to the Quick Posting list.

Follow-Up Letters

This part of the process is just as important as any other. Appeals to members about ministry involvement that include a follow-up are much more successful. A follow-up process covers the following points:

- Make sure the data about members who respond is entered into the program.
- Send a follow-up letter to those who do not respond.
- Contact those who respond favorably within a short period of time.
- Send a note to those who respond negatively.
- Select one of those who volunteered to help members with a particular need.
- Run reports to analyze the response to the Stewardship Invitation.

After entering responses, you should send follow-up letters. This is a way to acknowledge that you received their commitment card and thank them for any commitments they've made. In the case of a negative response, it's a nice idea to send a note acknowledging their response.

You can also print letters to the group of members who haven't responded. This provides a second chance for commitment in case the first letter was misplaced or forgotten.

No Response - Those Expected to Reply

The Stewardship Library of Reports provides three follow-up letters for those who haven't responded. The first is for a special group that you really expected a reply from. For example, perhaps you personally invite a small group at a special gathering and you expect that they will all reply, but some do not. This is a special letter for them.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Member** > **Letters** > **No Response– Those Expected to Reply**.

No Response - Those Not Involved

Use this report to print a letter for those who aren't currently involved in any ministry and who haven't responded to your invitation.

Tip

When you select the group to print for this letter, be sure to include only those who still have Sent Letter for the status on the invitation line. Those who already responded have been changed to either Negative Response or Positive Response.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Member** > **Letters** > **No Response– Those Not Involved**.

Useful Information

To print this letter only for members with no active ministries who were already sent the first letter (logged as Introductory Letter - Not Inv), you must enter some information on the Additional Selection tab, which is located in the last window of the Report wizard. As long as you have been logging the letters as you send them, this is easy to do. Add three new conditions with the following selections:

- **Mem. Active Ministries** is equal to ______ (leave the field blank)
- **Letter Description** is equal to **Introductory Letter - Not Inv**
- **Letter Type** is equal to **Sent Letter**

After you print the letters, you are prompted to make an entry on the member's record. We suggest that you log the letters you send for stewardship to make it easier to identify members for future mailings. The information you enter here is logged in the Members window.

No Response - Active in Ministry

Use this report to print a letter for those who are currently involved in a ministry and who haven't responded to your invitation.

Tip

When you select the group to print for this letter, be sure to include only those who still have Sent Letter for the status on the invitation line. Those who already responded have been changed to either Negative Response or Positive Response.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Member** > **Letters** > **No Response– Active in Ministry**.

Useful Information

To print this letter only for members who have one or more active ministries and who were already sent the first letter (logged as Introductory Letter - Active), you must enter some information on the Additional Selection tab, which is located in the last window of the Report wizard. As long as you have been logging the letters as you send them, this is easy to do. Add three new conditions with the following selections:

- **Mem. Active Ministries** is equal to ______ (leave the field blank)
- **Letter Description** is equal to **Introductory Letter - Active**
- **Letter Type** is equal to **Sent Letter**

After you print the letters, you are prompted to make an entry on the member's record. We suggest that you log the letters you send for stewardship to make it easier to identify members for future mailings. The information you enter here is logged in the Members window.

Positive Response - Those Not Involved

You can print a letter for those who aren't currently involved in any ministry and who gave a positive response to your invitation. First, you must be sure that the positive response was entered into the Church Office program.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Members** > **Letters** > **Positive Response– Those Not Involved**.

Useful Information

To print this letter only for members with no active ministries who were already sent the first letter (logged as Introductory Letter - Not Inv), you must enter some information on the Additional Selection tab, which is located in the last window of the Report wizard. As long as you have been logging the letters as you send them, this is easy to do. Add three new conditions with the following selections:

- **Mem. Active Ministries** is equal to ______ (leave the field blank)
- **Letter Description** is equal to **Introductory Letter - Not Inv**
- **Letter Type** is equal to **Positive Response**

After you print the letters, you are prompted to make an entry on the member's record. We suggest that you log the letters you send for stewardship to make it easier to identify members for future mailings. The information you enter here is logged in the Members window.

Positive Response - Active in Ministry

You can print a letter for those who are currently involved in a ministry and who gave a positive response to your invitation. First, you must be sure that the positive response was entered into the Church Office program.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Members** > **Letters** > **Positive Response– Active in Ministry**.

Useful Information

To print this letter only for members who have one or more active ministries and who were already sent the first letter (logged as Introductory Letter - Active) and had a positive response, you must enter some information on the Additional Selection tab, which is located in the last window of the Report wizard. As long as you have been logging the letters as you send them, this is easy to do. Add three new conditions with the following selections:

- **Mem. Active Ministries** is equal to ______ (leave the field blank)
- **Letter Description** is equal to **Introductory Letter - Active**
- **Letter Type** is equal to **Positive Response**

Negative Response - Those Not Involved

You can print a letter for those who aren't currently involved in any ministry and who gave a negative response to your invitation. First, you must be sure that the negative response was entered into the Church Office program.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Members** > **Letters** > **Negative Response– Those Not Involved**.

Useful Information

To print this letter only for members with no active ministries who were already sent the first letter (logged as Introductory Letter - Not Inv) and had a negative response, you must enter some information on the Additional Selection tab, which is located in the last window of the Report wizard. As long as you have been logging the letters as you send them, this is easy to do. Add three new conditions with the following selections:

- **Mem. Active Ministries** is equal to ______ (leave the field blank)
- **Letter Description** is equal to **Introductory Letter - Not Inv**
- **Letter Type** is equal to **Negative Response**

Negative Response - Active in Ministry

You can print a letter for those who are currently involved in a ministry and who gave a negative response. First, you must be sure that the negative response was entered into the Church Office program.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Members** > **Letters** > **Negative Response– Active in Ministry**.

Useful Information

To print this letter only for members who have one or more active ministries and who were already sent the first letter (logged as Introductory Letter - Active) and had a negative response, you must enter some information on the Additional Selection tab, which is located in the last window of the Report wizard. As long as you have been logging the letters as you send them, this is easy to do. Add three new conditions with the following selections:

- **Mem. Active Ministries** is equal to ______ (leave the field blank)
- **Letter Description** is equal to **Introductory Letter - Active**
- **Letter Type** is equal to **Negative Response**

Additional Communications Reports

In addition to the letters, there are some other reports you might find useful to record a member's Time and Talent.

Member Label

You can print labels to use when sending letters or anything else you want to address to members. The Member Label report prints one label for each member and gives you the convenience of easily selecting the ministries and statuses that a member must be involved with in order for a label to print. This saves you some effort in the Selection window.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Member** > **Label/Envelope Reports** > **Member Label**.

Family Label

You can print labels to use when sending letters or anything else you want to address to families. The Family Label report prints one label for each family, although the label can include names for several members in the family. You can also select to include only those family members with certain ministries.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Family** > **Label/Envelope Reports** > **Family Label**.

Member Envelope

You can print mailing envelopes to use when sending letters or anything else you want to address to members. The Member Envelope report prints one envelope for each member and gives you the convenience of easily selecting the ministries and statuses that a member must be involved with in order for an envelope to print. This saves you some effort in the Selection window.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Member** > **Label/Envelope Reports** > **Member Envelope**.

Member Envelope with Barcode

You can print mailing envelopes with intelligent barcodes to use when sending letters or anything else you want to address to members. The Member Envelope with Barcode report prints one envelope for each member and gives you the convenience of easily selecting the ministries and statuses that a member must be involved with in order for an envelope to print. This saves you some effort in the Selection window.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Member** > **Label/Envelope Reports** > **Member Envelope with Barcode**.

Family Envelope

You can print mailing envelopes to use when sending letters or anything else you want to address to families. The Family Envelope report prints one envelope for each family, although the label can include names for several family members. You can select to include only those family members with certain ministries.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Family** > **Label/Envelope Reports** > **Family Envelope**.

Time and Talent Personal Visit Worksheet

If you plan to have people contact members in person, you can use the Personal Visit Worksheet report. This report prints the member's name and address, when to return the form, and provides blank lines for recording the names, addresses, and phone numbers of those interested.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication– Member** > **Worksheets** > **Personal Visit Worksheet**.

Time and Talent Blank Personal Visit Worksheet

If you plan to have people contact members in person, you can use the Blank Personal Visit Worksheet report. This report prints the date of when to return the form and provides blank lines for recording the names, addresses, and phone numbers of those interested.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communications– Member** > **Worksheets** > **Blank Personal Visit Worksheet**.

Listing of Ministry for Reference

This report prints a list of selected ministries and optionally prints the names and phone numbers of those involved. This is especially handy for printing the names and phone numbers of the chairperson for each ministry to distribute to those who have volunteered. For example, you can print this report and make copies to send with all favorable response letters.

If you want to, you can include the same ministry in more than one category. This way, you can list a given ministry in every category that a member might think to look for it so they're less likely to overlook it. You don't have to print all of the ministries in the list. Some ministry keywords may not apply to your stewardship program.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Communication**– **Member** > **Lists** > **Listing of Ministry for Reference**.

Part 4 - Evaluation of Progress

There are reports specifically designed to help you analyze the progress of your stewardship program. On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Evaluation**.

Ministry Statistics

This is a statistical report that prints the number of members in each ministry. You can customize it to print all statuses or just the ones you're interested in. It also prints a summary at the end.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Evaluation** > **Ministry Statistics**.

Ministry Involvement Date Comparison

This is a statistical report that prints the number of members who have been involved in each ministry this year and in the past. You can customize it to print all statuses or just the ones you're interested in. You can also print a summary at the end.

On the Reports tab, click **All Reports** > **Stewardship** > **Ministry– Time and Talent** > **Evaluation** > **Ministry Ministry Involvement Date Comparison Involvement**.

Stewardship of Treasure

> **Useful Information**
>
> This section presumes that you have knowledge of the Fund section of Church Office and can easily set up a fund to handle all the details required in a campaign such as this. If you aren't familiar with funds, refer to the help guide first.

The Stewardship of Treasure is broken down into seven parts:

Part 1: Gather and Analyze Your Information — Once you determine that you want to proceed with this portion of the stewardship program, you must develop a plan.

- What goals do you want to achieve?
- What is the purpose of raising funds?
- How much do you want to increase? Over what period of time?
- Who will be involved?
- Do you want to make contact by mail, in person, or a combination of both?
- Who will direct this project?

The person or committee who directs the project is most important because it will succeed or fail based upon their efforts. Just because a person is an accountant, manager, or business owner does not mean they are suited for this leadership role. It must be someone who believes in the concept of stewardship, is organized, and able to lead. This person or committee should be given at least two or three months lead time to prepare for the beginning of the stewardship campaign. You might even consider hiring one person as the coordinator of the project. The increase in income can justify the expense.

Use the reports provided in the Stewardship Library of Reports to print information about the contributions in your parish, then ask a few questions:

- What is the giving pattern in our parish?
- Are there groups of members who stand out in these reports?
- How many are giving nothing? How many are giving less than $25 a year? Less than $50?
- How well do those involved in ministry contribute?
- As a result of this type of analysis, are there certain groups to target in fund raising?
- What amount of increase might be expected from various groups?

Part 2: Develop a Plan of Action — The committee/coordinator should begin to prepare a detailed plan based upon the previous steps. They'll need a minimum of two or three months to prepare for the actual campaign which will last from four to six weeks. They must develop the goals of the campaign and make necessary assignments to achieve the goals.

Part 3: Prepare Materials Used in Mailings and Displays — Once a plan has been established, all the materials that will be used to convey the message need to be developed. This includes letters, posters, banners, display materials, and so on. In addition, a great deal of attention must be given to the pulpit announcements and sermons that explain the purpose and nature of the whole project. It goes without saying that the concept of stewardship has as its basis the spiritual need for generosity and the earthly need to meet the parish's financial needs. These ideas must be incorporated in the overall presentations.

Part 4: Contact the Membership — Contacting the membership can be done in a variety of ways. The easiest way is from the pulpit and it's best if it is done more than once, each time presenting a different aspect of the project. Since the objective is to convince your membership of the value of stewardship, it will take a number of reminders. The more personal the approach, the more chance there is for success.

Part 5: Enter the Pledge Information — Make sure there's someone who understands the whole process appointed to enter the stewardship information into Church Office. Once the information has been entered, you can print statements and letters to those involved. You can also being to get a clear picture of the progress of your Stewardship process.

Part 6: Follow Up — After the initial information has been presented to your members, it's important to follow up. You should follow up with those who don't respond after the first appeal, and send thank you letters to those who do respond. Follow up with progress reports from the pulpit, in the bulletin, and in follow-up letters.

Part 7: Evaluate Progress — As information is accumulated, use the statistical reports found in the Stewardship Library of Reports to determine your progress. On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Evaluation**.

Resources

These websites provide some helpful stewardship ideas and materials:

Liturgical Press
Church Supplier
Evangelical Lutheran Church

Part 1 - Gather and Analyze Your Information

Data Investigation

Before developing any plan to increase contributions, it's wise to get an idea of the giving patterns in the past. This information is helpful when devising a plan of action. For example:

- What if only 20% of the giving members are using envelopes?
- What if over 50% haven't contributed?
- What if 25% give less than 25 cents per week?
- What if 30% contribute only at Christmas or Easter?
- What if those involved in ministry have an average contribution of $1 per week?
- What if those who are between 30 and 45 gave less than $1 per week?

These are a few of the many questions that could be asked when analyzing financial information. The answers to these questions pin point possible areas that need attention in any campaign to increase stewardship awareness.

The computer can print many reports that assist in this type of analysis; however, the computer cannot do the thinking required after the reports print. This is the job of an individual or a committee who will spearhead this project.

> **Useful Information**
>
> If the preliminary reports don't provide satisfactory information, it's possible that the data already entered into the program hasn't been consistent or logical. For example, if regular contributions are entered into two different funds, reports are confusing.

The Stewardship Library of Reports contains a number of reports that are helpful in the analysis stage of this process. They are designed to answer some basic questions, such as the following:

- How many active families are there?
- How many inactive families are there?
- How much money is contributed?
- How is the money contributed?

These are just a few of many questions that might be raised before embarking on a stewardship project. To view reports that help answer these questions, on the Reports tab, click **All Reports** > **Stewardship** > **Financial–Treasure** > **Preparation**.

Demographic and Financial Info

The Demographic and Financial Info report gives you an overall picture of the financial status of your parish. This report includes the total number of active and inactive families in the parish, the total number of members involved in ministry, the number of families making contributions, and the total amount contributed. It prints the average weekly contribution as well as a comparison of total contributions made by families involved in ministry to total contributions made by families not involved in ministry.

Useful Information

Members marked as deceased are not included in the totals.

If you have set up an activity for Christmas or Easter, the report can print the amounts contributed on those days. Likewise, it can report on the loose collection if you enter data to record those amounts.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Preparation** > **Demographic and Financial Info**.

Tip

Since this report prints statistics about both active and inactive families, make sure to include both in the Selections window.

Monthly, Quarterly, and Yearly Totals

The Monthly, Quarterly, and Yearly Totals report gives you an overview of up to four years' worth of totals. It prints the total amount given in each month with subtotals for each quarter and grand totals for each year; it prints one column for each year printed.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Preparation** > **Monthly, Quarterly, and Yearly Totals**.

In the Select Funds to Print window, consider how many years you want to print. If a date range for just one year is entered, only one column of totals will print. If the date range spans two years, two columns will print, and so on. For the broadest view, enter a four year date range (this is the largest span that you can print). We suggest printing at least two years' worth of data.

Breakdown Analysis by Amount Given

The Breakdown Report prints a breakdown of contribution amounts and gives you an idea where contributions can be increased. It breaks down contributions by categories of giving and displays the number in each category and the total amount in that category. This report is very helpful when setting up goals based upon encouraging contributors to move from one category level to the next category level. It can show which category or combination of categories are contributing the greater percentage of the total contribution. You can define categories that come preset with values you can use.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Preparation** > **Breakdown Analysis by Amount Given**.

The report also does some additional analysis on the first ten categories of users. These categories represent families who average $1 per month, $2 per month, $3 per month, up to $10 per month. It shows information about each of these groups, then does some calculations on all of these groups together, showing the total number of families, the total amount given by all for the year, the high average monthly amount, and the high average weekly amount. You can change the values, but make sure they are kept in the proper sequence.

Breakdown Analysis by Percentage

This report prints information about each segment representing 10% of your families. In the following example, you see that the 10% of families who donate the highest amounts contribute as much as the 70% of families who donate the lowest amounts.

Breakdown by Percentage of Total Families

Rank	Number of Contributors	Group Total Per Year	Group Avg Per Month	Group Avg Per Week	Percent of Total	Cumulative Percentile	Cumulative Total
Lowest 10 %	89	1,015.11	84.59	19.52	0.19 %	10 %	1,015.11
10 %	89	3,180.00	265.00	61.15	0.58 %	20 %	4,195.11
10 %	89	7,297.00	608.08	140.33	1.34 %	30 %	11,492.11
10 %	89	14,246.25	1,187.19	273.97	2.61 %	40 %	25,738.36
10 %	88	22,120.03	1,843.34	425.39	4.05 %	50 %	47,858.39
10 %	88	31,704.00	2,642.00	609.69	5.80 %	60 %	79,562.39
10 %	88	43,633.00	3,636.08	839.10	7.99 %	70 %	123,195.39
10 %	88	62,143.56	5,178.63	1,195.07	11.37 %	80 %	185,338.95
10 %	88	97,061.61	8,088.47	1,866.57	17.77 %	90 %	282,400.56
Highest 10 %	88	263,944.54	21,995.38	5,075.86	48.31 %	100 %	546,345.10

Analysis

884 families who contributed have been sorted into groups according to the amount given and categorized into ten percentage categories, as shown above.
Comparing 'Cumulative Total' with 'Group Total per Year', the top 10% of givers donate as much as the bottom 80%.

Breakdown by Percentage of Individual Families

Rank	Number of Contributors	Group Total Per Year	Individual Avg Per Family	Individual Avg Per Week	Individual Pct of Total	Cumulative Percentile	Cumulative Avg of all Donors
Lowest 10 %	89	1,015.11	11.41	0.22	0.00 %	10 %	11.41
10 %	89	3,180.00	35.73	0.69	0.01 %	20 %	23.57
10 %	89	7,297.00	81.99	1.58	0.02 %	30 %	43.04
10 %	89	14,246.25	160.07	3.08	0.03 %	40 %	72.30
10 %	88	22,120.03	251.36	4.83	0.05 %	50 %	108.11
10 %	88	31,704.00	360.27	6.93	0.07 %	60 %	150.14
10 %	88	43,633.00	495.83	9.54	0.09 %	70 %	199.52
10 %	88	62,143.56	706.18	13.58	0.13 %	80 %	262.85
10 %	88	97,061.61	1,102.97	21.21	0.20 %	90 %	356.20
Highest 10 %	88	263,944.54	2,999.37	57.68	0.55 %	100 %	620.52

Analysis

A family's annual giving can be compared to the 'Individual Average per Family' column to determine how they compare to the church as a whole.
If a family gave $11.41 per year, they would be giving in the bottom 10% compared to the rest of the church.

The 'Cumulative Average of All Donors' is the average annual donation at each percentile.
For example, the bottom 50% (half) of the families gave an average of $108.11 or less per year.
$620.52 is the average donation for all families.

Note: The total amounts given do not include credits or additional gifts.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Preparation** > **Breakdown Analysis by Percentage**.

Tip
We suggest that you limit the data in this report to a single year to show an annual picture. Selecting less than a year is not a good representation of giving patterns, because the time of year affects contribution data. Selecting more than a year will show higher giving amounts than are seen in a single year.

Comparison by Week and Year

This report prints a weekly, monthly, and quarterly break down of contribution total amounts for up to three years. Optionally, you can also print weekly, monthly, and quarterly variances along with projected amounts. This report shows the detailed picture of contributions over a three-year period with the week-by-week, month-by-month, and quarter-by-quarter history of giving.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Preparation** > **Comparison by Week and Year**.

Tip

This report shows a comparison between two or three years, so select a date range spanning two or three years. If you plant to print variances, select a date range of at least two years.

Additional Field Information

Contribution Options

- **Include Credits with the Paid Amount** — Credits are amounts waived by the parish, such as scholarships or financial assistance. We recommend clearing this checkbox so that the report reflects only donated amounts.
- **Include Gifts with the Paid Amount** — Additional gifts are amounts given that are over the pledged amount. Select this option to include financial payments set up as Additional Gifts.

Variances and Projections

- **Print Variances** — Print the variances between the years.
- **Print Projections**— Print projections for the next year, then select how you want the program to calculate those projections.
  - **Base the Projection on the Prior YTD Variance Projection** — Base projections on the percentage of change in the prior period. This projects the increase in next year based on the increase from last year to this year.
  - **Base the Projection on a Fixed Percentage** — If you want to show projections for next year's amounts as a fixed percent that you determined rather than those based on the increase or decrease from last year, enter a fixed percentage change for the projections. For example, if you enter "50" here, the projections will show a 50% increase over this year's totals.

Date Ranges

Specify the date ranges for the report. For the most accurate comparisons, select the same date range for each of the years.

Month and Quarter Calculation Options

- **Base monthly totals on weeks that fall in a given month (like Version 17.4)** — Print the report as it would have printed in Census 17. This method calculates weeks in whole week blocks. For example, if the first week of the month starts on Wednesday, this method would include Monday and Tuesday's totals in the month. To calculate totals strictly based on the date, clear this option.

Worksheet for Pledge Entry

This report is a useful worksheet. For each family, it prints blank lines for recording pledge information, and it can also print information about a pledge that the family made in the past.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Preparation** > **Worksheet for Pledge Entry**.

Analyzing the Information

After you print all the reports, you can examine the contribution information contained in the reports. If more than one person is going to study these reports, it's a good idea to package the reports together for each person and provide them with some guidelines to guide the analysis. For example:

- How are envelopes being used?
- How frequently are families contributing?
- Are there any significant patterns in giving?
- Is there anything significant about the group that contributes nothing? Less than $10 per year?
- Are there many who only contribute at Christmas and Easter?
- Are there any groups of contributors that you need to focus on?

These are just a few of the questions that you can ask during this stage of the process.

Preparation reports are helpful in your preliminary analysis. They're designed to tell you something about the past history of giving and can show some patterns that will help you prepare your plan of action for increased contribution of giving. If you're interested in how ministry affects giving, you can use the reports in the **Combined Time, Talent and Treasure** menu. For more about these reports, see Combined Stewardship of Time, Talent, and Treasure.

> ⚠ **Note**
>
> When you analyze the reports, you may discover inconsistencies in data entry. For example, fund periods vary from year to year, amounts are entered in different funds, and so on. Data inconsistencies make analysis more difficult.

Questions to Consider

The following are sample questions you can ask as you begin to analyze the reports:

- Are there many inactive families?
- Should they be a part of this process?
- Should some families be removed?
- Are there groups of members who stand out in these reports?
- How many are giving nothing? Less than $25 a year? Less than $50?
- Should substantial donors be handled differently?
- How well do those involved in ministry contribute?

Part 2 - Develop a Plan of Action

After you have analyzed the contribution history, it's time to develop your plan of action. This plan is unique for each parish because it should reflect the understanding that comes out of the analysis stage. The following ideas can help you develop your plan of action:

- An understanding of the concept of sacrificial giving, which needs to color all materials used in presenting your Sacrificial Giving program.
- A timetable for the program - when it begins and ends, mailing dates, homily dates, meeting dates, and so on.
- What are the objectives of the sacrificial giving project?
- Who will monitor the progress of the project? How will progress be communicated to your membership?
- Who will be in charge of various aspects of the project? Developing materials, writing letters, supervising the mailings, and so on.

Suggested Outline

This suggested outline requires at least a few months of preparation by those involved in the process. The more time spent preparing, the better the chance of success.

Preliminary Preparation

1. Establish a Sacrificial Giving Committee (a small group to oversee each step in the process). Assign one or two coordinators. Give this committee at least two months to prepare.
2. Develop a common understanding of sacrificial giving so it can be offered to the whole community.
3. Decide on the theme and content of all materials (letters, brochures, displays, and so on). This program is based upon two mailings, so develop the materials and letters with that in mind.
4. Complete work on brochure material and print them before the first week of the program.
5. Compose bulletin announcements.
6. Develop a timetable for each step of the process.
7. If you plan to use eGiving (automatic payments made from member checking accounts), make sure you have procedures set up and materials on hand to explain that process.
8. Make sure there is someone who knows how to set up the fund in the Census/Contribution program to record pledge information. This same person should know how to develop a follow-up process.

First Week

- Print information about sacrificial giving in the bulletin. Make an announcement about the program from the pulpit.
- Complete letters that you will use and print them so they are available for mailing this week. Invite people to pray for the success of the Sacrificial Giving program.

Second Week

- Print information about sacrificial giving in the bulletin. Give special emphasis about the program from the pulpit.
- Invite people to pray for the success of the Sacrificial Giving program.
- Bring the second mailing to the post office so it will be mailed before the end of the week.
- Display posters and banners about the program. Use a thermometer graph to show progress.

Third Week

- Print information about sacrificial giving in the bulletin. Make an announcement about commitment or pledge cards that will be collected next weekend.
- Display progress information about the program.
- Invite people to pray for the success of the Sacrificial Giving program.
- Homily and/or witness about sacrificial giving at each weekend service.

Fourth Week

- Print information about sacrificial giving in the bulletin.
- Invite people to pray for the success of the Sacrificial Giving program.
- Homily and/or witness about sacrificial giving at each weekend service.

Fourth Week

- Print information about sacrificial giving in the bulletin.
- Invite people to pray for the success of the Sacrificial Giving program.
- Homily and/or witness about sacrificial giving at each weekend service.
- Special ceremony in picking up and receiving the pledge cards.

Follow-Up

- Send reminders to those who haven't returned commitment cards.
- Develop a procedure for those who have recently registered so they can participate in sacrificial giving.
- Send thank you letters to those who have pledged and include a progress report.
- Put inserts in the bulletin about the progress of the Sacrificial Giving program.
- Prepare announcements from the pulpit that speak to the progress of the program.

Part 3 - Prepare Materials Used in Mailings and Displays

Once a plan is established, you must develop all materials that will be used to convey the message. This includes letters, posters, banners, display materials, and so on. In addition, you need to prepare pulpit announcements, talks, or homilies that explain the purpose and nature of the project.

Stewardship has the spiritual need for generosity and the earthly need to meet the parish's financial needs. You must incorporate these ideas in the overall presentation.

Bulk Mailing is an Option

The U.S. Postal Service provides a discount to those who mail a number of pieces at the same time and who do some of the work by sorting the mail. You might explore this option when you are mailing letters to your membership. You are required to have the ZIP Codes certified within a six-month period before a mailing if you are going to use barcodes. This is called CASS (Coding Accuracy Support System) certification. This means having all ZIP Codes in your database checked and corrected by an authorized source. To take advantage of an additional discount you must be certified within 90 days of the mailing and include the postal line of travel information (LOT) in the ordering of the pieces of mail. This low rate, called the Enhanced Carrier Route Rate, is not available in every ZIP Code. If you want to take advantage of this lower rate, make sure those who CASS Certify your data put in the line of travel (LOT) information.

Before you do a bulk mailing, you must take care of Postal Service forms and fees. This can take some time, so don't wait until the last moment. In addition, there are some questions you need to answer before you check with the Postal Service:

- Which class do you intend to use: First Class or Standard Class?
- Are you going to print barcodes to get an additional discount?
- What postage method should you use: precanceled stamps, Permit Imprint, or Postal Meter?

Taking advantage of Bulk Mailing discounts can mean a significant savings on mailings containing a large number of pieces. However, it also means that you will have to do more work before taking your mail to the Post Office. PDS can help with the bulk mailing process in the following ways:

- You can check the addresses for common errors before running CASS Certification.
- Use the CASS It! Certification feature to verify bulk mailing addresses.

  > **Useful Information**
  >
  > PDS is authorized by the U.S. Postal Service to do CASS Certifications.

- The PDS EZ-Mail feature can be used to print letters and labels from the Stewardship Library of Reports. This makes it easier for you to perform the complex steps required to prepare a mailing at discounted postage rates. As it prints your letters or labels, it automatically sorts them into the order required by the Post Office to qualify for a discount.

Part 4 - Contact the Membership

Contacting members can be done in a variety of ways. The easiest way is to address members from the pulpit on multiple occasions, each time presenting a different aspect of the project. You should also send letters and other information in the mail multiple times. The objective is to convince your membership of the value of stewardship, so it will take a number of reminders to keep the subject in their minds. The more personal the approach, the more chance there is for success.

For reports that can be used during this part of the process, on the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Communication**.

You can edit the wording of these letters and pledge cards. We encourage you to take advantage of this and make the letters as specific to your parish as possible. Since all of these reports are financial reports, there's a window in the Report wizard where you must select the fund(s) and a date range. Any additional options window are described in the description of each communication report.

Intro Letter

The first letter can be sent to everyone on your list and can be sent with brochures or other printed materials.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Communication** > **Letters** > **Intro Letter**.

Useful Information

You can customize a set of letters by editing the wording. To change the text of the letter, in the Listing Layout window, click **Modify the Body of the Letter**.

After you print the letters, you are prompted to make an entry on the family's record. We suggest that you log the letters you send for stewardship to make it easier to identify families for future mailings.

Tip

The Note field is most useful for notifications when receiving responses to the letter later.

The information you enter is logged in the Families window.

2nd Letter

You can send the second letter with a pledge card and more information about sacrificial giving. This letter is a follow-up to the first letter and is the second letter that the family receives about stewardship.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Communication** > **Letters** > **2nd Letter**.

Useful Information

To edit the text of the letter, in the Listing Layout window, click **Modify the Text of the Letter**.

After you print the letters, you are prompted to make an entry on the family's record. We suggest that you log the letters you send for stewardship to make it easier to identify families for future mailings.

Tip

The Note field is most useful for notifications when receiving responses to the letter later.

The information you enter is logged in the Families window.

Pledge Card with Prior Pledge Info

The pledge card can be sent with a letter. You can use the same report selections you used to print the letter and print one card per letter.

> **Note**
>
> The letter and card contain personal pledge information from the previous year. So, it's important to make sure the letter and card are addressed to the same person.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial – Treasure** > **Communication** > **Pledge Cards** > **Pledge Card with Prior Pledge Info**.

After you print the letters, you are prompted to make an entry on the family's record. We suggest that you log the letters you send for stewardship to make it easier to identify families for future mailings.

Blank Pledge Card

This pledge card is a sample designed to be sent with a letter. You can use the same report selections you used to print the 2nd letter and print one card per letter, or you can select to print a card for one given family, then make copies to send in the other letters.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Communication** > **Pledge Cards** > **Blank Pledge Card**.

Financial Stewardship Personal Visit Worksheet

Use this report if you plan on contacting members in person. It prints the name of your giving program, the member's name and address, when to return the form, and provides blank lines for recording the names, addresses, and phone numbers of those interested.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Communication** > **Worksheets** > **Personal Visit Worksheet**.

Useful Information

- For the Number of Members to Sign Up field, enter the number of lines you want to print on the worksheet.
- The name of your sacrificial giving program is only used on this worksheet.

Financial Stewardship Blank Personal Visit Worksheet

Use this report if you plan on contacting members in person. It prints the name of your giving program, when to return the form, and provides blank lines for recording the names, addresses, and phone numbers of those interested.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Communication** > **Worksheets** > **Blank Personal Visit Worksheet**.

Useful Information

- For the Number of Members to Sign Up field, enter the number of lines you want to print on the worksheet.
- The name of your sacrificial giving program is only used on this worksheet.

Part 5 - Enter the Pledge Information

Once you start your stewardship program, it's important to enter information from pledge cards as soon as possible. There are two types of information that are of concern: pledge details and the response type.

Entering Pledge Details

Use the Terms/Rates quick posting to enter this information quickly and accurately.

> **Useful Information**
>
> Before you enter the information from the pledge cards, it's important that you have everything set up in the Fund Setup window for the fund you will be using.

To ensure the pledge is ready for pledge entry, consider the following:

- If people will be pledging a certain amount each week, month, quarter, and so on, your fund must include a Charge activity type.
- Contributions are usually tax-deductible, so most of your payment activities should be set up with a Payment – Deductible type.
- Including a group total or balance is optional.
- You can define more than one group for activities, if necessary.

Other things you can add to your fund setup include the following:

If someone gives additional amounts that don't apply to the pledge, you can define a special activity with an Additional Gift type to track this type of donation. For example, a family can pledge to give $100 monthly but may also want to donate $50 towards flowers for the altar. In the Fund Setup window, insert **Flowers** as an activity name with an Additional Gift – Deductible type.

If someone gives an amount in addition to the pledged amount every week or month but wants that amount to count toward the pledge, in the Fund Setup window, enter a Pay Down – Deductible activity type. For example, a family can pledge $25 monthly but may want to pay an additional "down payment" of $100 up front. In this case, the $100 is a pay-down amount. However, if the family wants to treat the $100 as an initial payment so they can skip paying for four months, then resume the $25 payments every month, this is not a pay-down situation. To handle this, use the regular Payment – Deductible type used for the other regular monthly contributions.

Entering Responses to Pledge Cards

As families begin returning pledge cards, it's important to update their records with any pertinent information on the card. You can make entries for each family on their individual record, or you can process a group of families at once. If you only need to update records for a few families, enter the information individually in their Letters, Visits, Etc window. However, if you are entering information for a large group of families, you should use the Change Letters, Visits, Etc. process.

> **Useful Information**
>
> It's just as important to post negative responses as it is to post positive responses. Most likely, you will have far fewer negative responses, so you should process the negative responses individually.

When you print letters or pledge cards to send out, you are prompted to log the letter or pledge card in the family's record. This process uses the log information to update family records with responses.

Part 6 - Follow Up

After you present and mail the initial information to your membership, it's important to develop a follow-up procedure. You can send a special mailing to the following:

- Those who did respond (thank you letter)
- Those who did not respond after the first appeal (reminder letter)
- Those who did respond with a substantial pledge (special letter)
- Those who need an end-of-year statement for tax purposes

It's also important to continue progress reports from the pulpit and in the bulletin during the course of the Sacrificial Giving program. Some letters are available for you in Church Office, but you can develop and organize custom letters in the User Reports under each subheading.

Thank You Letter

Send this letter to those who have made a pledge. It includes the amount the family pledged and a note about the status of the Sacrificial Giving program.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Communication** > **Letters** > **Thank You Letter**.

Useful Information

- In the Select Funds to Print window, make sure you enter the entire date range for the fund so that the pledged amount that prints on the letter becomes the total amount pledged for the entire period of time, not just the amount they have pledged so far. You should use a future date for the ending date, not the current date.
- To print a thank you letter for only those who have pledged an amount, you could use the following additional selection: **Calc Fund.Total Pledged** is greater than **0**.

After you print the letters, you are prompted to make an entry on the family's record. We suggest that you log the letters you send for stewardship to make it easier to identify families for future mailings.

Tip

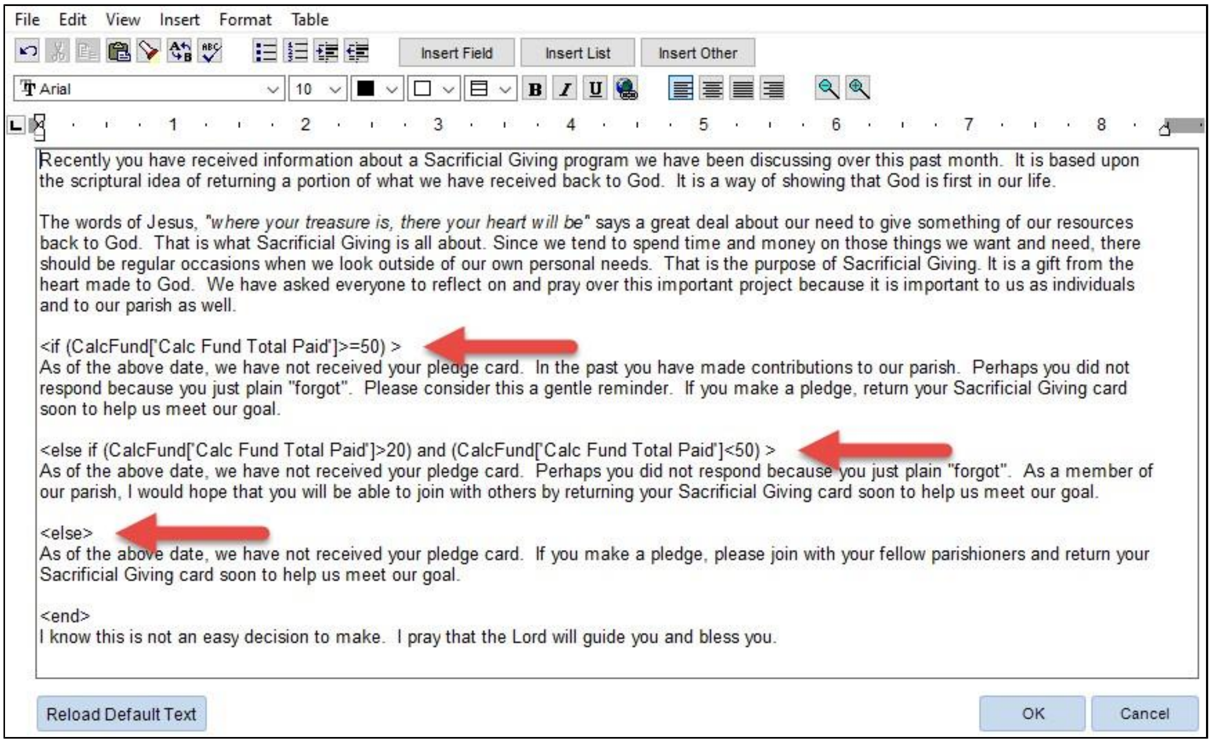
The Notes field is useful for notifications when receiving responses to the letter later on.

No Response with Special Paragraphs

This letter performs multiple functions. It has special paragraphs that print on the basis of specified conditions. For example, it prints one paragraph if the family gave $50 or more in the previous year, another paragraph if they gave $20-50, and another paragraph if they gave less than $20.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Communication** > **Letters** > **No Response with Special Paragraphs**.

In the Letter Layout window, click **Modify the Text of the Letter**. The following text displays:



The three conditions (indicated in the image above with red arrows) trigger the appropriate paragraph based on the family's record. If a family contributed over $50 in the previous year, it prints the first paragraph. When the program finds a family that has contributed less than $20, it prints the last paragraph.

> **Useful Information**
> You can edit the text of the paragraphs and you can edit the conditions. For example, if you want to start at a higher amount, such as $100, change the amount in the first condition from $50 to $100.

Progress Report

Send this letter to those who have made a pledge to inform them how the Stewardship program is progressing. This letter includes the amount the family pledged, the amount they have paid so far, and a note about the status of the Sacrificial Giving program.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Communication** > **Letters** > **Progress Report**.

Useful Information

In the Select Funds to Print window, make sure you enter the entire date range for the fund so that the pledged amount that prints on the letter becomes the total amount pledged for the entire period of time, not just the amount they have pledged so far. You should use a future date for the ending date, not the current date.

Follow Up - No Response

Send this letter to those who have not responded with a pledge. It includes a note about the status of the Sacrificial Giving program.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Communication** > **Letters** > **Follow Up– No Response**.

Useful Information

- To print No Response letters to only those who haven't pledged an amount, use the following addition selection: **Calc Fund.Total Pledged** is equal to ______ (leave this field blank).
- If the fund hasn't been added to all of the families, you can clear **Skip Families That Don't Have Any Selected Funds** to send a letter to everyone in your parish who hasn't returned a pledge card.

Payment Booklets

If you want to remind pledging families to make payments, there are two reports that work together to help you produce a booklet of payment coupons. Each coupon has a stub part (which remains stapled to the booklet) and a coupon part (which is removed at the perforation and returned with each payment).

The Capital Fund Campaign Payment Booklets report prints the coupons on special perforated paper, with four coupons per sheet. The Cover for Payment Booklets report also prints on perforated paper but can print only one coupon per family, so you can place it on top of the other coupons as a booklet cover. Use heavier paper in a different color for this cover report.

Assembling Payment Booklets

After you print the coupons and booklet covers, you can assemble the payment booklets.

1. Detach the coupons at the horizontal perforations and separate the coupons from the 1/4" pieces at the top and bottom of each page. Discard the 1/4" pieces.

   > **Useful Information**
   >
   > Do not separate the pages at the vertical perforations. If you do this, the coupon is detached from the corresponding stub.

2. Detach the coupon covers at the horizontal perforations and separate the covers from the 1/4" pieces at the top and bottom of each page. Discard the 1/4" pieces.
3. Separate all coupons for a single family and make sure they are in sequential order with the first coupon on top and the last coupon on the bottom. Make sure all edges are even.
4. Place the cover coupon for the same family on top of the coupons.

   > **Tip**
   >
   > If you want to have a back cover, detach an unprinted cover coupon and place it on the bottom.

5. Staple the coupons together at the left edge.
6. Repeat these steps for each family.

   > **Note**
   >
   > Since families can have different numbers of coupons in their booklet, make sure you don’t mix up coupons.

Capital Fund Campaign Payment Booklets

This report prints pages for payment booklets on special perforated coupon forms, printing one coupon for each scheduled payment. You can print coupons for any families with terms. Separate the coupons to create a payment coupon booklet, then run the **Cover for Payment Booklets** report to print matching booklet covers with the mailing address. Four coupons print on each single sheet of coupon paper.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Communication** > **Payment Booklet** > **Capital Fund Campaign Payment Booklets**.

Useful Information

- Check your printer manual before printing on perforated paper.
- You can order paper from Deluxe Business Forms and Supplies (1-800-328-0304) using priority Service Code T07217.

You can print payment coupons for the entire pledge period or any portion of a pledge period. In the Select Funds to Print window, enter the entire date range of the pledge period. This ensures that the Balance Remaining reflects the entire pledge amount on the printed stubs. You must do this even if you select to print fewer coupons than are needed for the entire pledge drive.

When the report prints, tear the coupons at the perforations. This produces a stack of payment coupons that you can combine into booklets. The terms, rates, and coupon start and end dates determine how many coupons print for each family. If you are printing a period of one year, families with monthly terms print 12 coupons; those with weekly terms print 52 or 53 coupons; those with quarterly terms print four coupons, and so on.

Note

Make sure that the coupons for one family are not mixed with those from another family and that they are kept in sequential order.

Cover for Payment Booklets

This report prints covers to match payment booklets printed with the Capital Fund Campaign Payment Booklets report. It also uses special forms that print a customizable title, mailing name, and address in an envelope window. One cover prints for each family.

Tip

Print a few covers on plain paper to test the layout before you print on perforated paper. This gives you a chance to adjust the placement of the address, phrase, and graphic before you print the final copies on perforated paper.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Communication** > **Payment Booklet** > **Cover for Payment Booklets**.

Useful Information

You can order paper from Deluxe Business Forms and Supplies (1-800-328-0304) using priority Service Code T07217. This light gray paper is slightly heavier than the coupon paper.

Financial Family Mailing Label

You can print labels to match your letters or payment booklets. When you use the label reports found in the Financial Reports section, you can use the same selections you used when you printed the letters or booklets. This report prints one label for every family.

On the Reports tab, click **All Reports** > **Financial Reports** > **Label/Envelope Reports** > **Family Mailing Label**.

Part 7 - Evaluate Progress

As your Sacrificial Giving program progresses, there are a number of evaluation reports you can use to track progress and analyze data.

Goal Statistics

This report uses financial goals that you set up for each fund in the Fund Setup window. The report prints totals pledged and paid, as well as percentages achieved. It also supplies a projection based upon current figures.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Evaluation** > **Goal Statistics**.

Individual Pledge and Payment

This report can print up to five years of information for comparison. It prints the total amount pledged or paid by each family in each year. At the end of the report, it summarizes the totals pledged or paid for all families in each of the years for each fund requested.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Evaluation** > **Individual Pledge and Payment**.

Useful Information

- Since this report prints information for every family selected, it can be rather lengthy. Use additional selections to print smaller groups of information. For example, print only those families who gave more than $200.
- In the Select Funds to Print window, specify more than one year in the date range. Printing a single year or less prints totals for that period of time, but it doesn't provide you with previous data so you can compare.

Pledge Progress Breakdown

This report prints information to help you determine how the pledge drive is progressing. Information is broken down by pledging categories so you can see how families in each category are meeting goals.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Evaluation** > **Pledge Progress Breakdown**.

In the Select Funds to Print window, set the date range to start on the first date of the pledge drive and end on the current date.

Projection of Yearly Comparison

This report prints a comparison of last year's pledge and this year's pledge based on categories of amount given.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure** > **Evaluation** > **Projection of Yearly Comparison**.

Yearly Comparison of Pledges and Payments

This report prints a comparison of the current pledge period with the previous pledge period. Information is printed in categories of pledge amounts. The report also compares amounts given in both periods.

On the Reports tab, click **All Reports** > **Stewardship** > **Financial– Treasure > Evaluation** > **Yearly Comparison of Pledge/Payments**.

In the Select Funds to Print window, select the date range of the current fund period. The previous fund period also prints.

Combined Stewardship of Time, Talent, and Treasure

Members who are active in the parish community are more likely to contribute monetarily to the parish. If you are running programs for Ministry of Time and Talent and Ministry of Treasure, you may also be interested in the Combined Time, Talent, and Treasure reports in the Stewardship Library of Reports. These reports print information about involvement in ministries and pledging.

Family Financial and Ministry Info

This report prints one page per family with detailed information about each member, such as age, occupation, language, grade, sacramental status, and remarks. The sheet also prints the total amount pledged and paid within the specified date range. You could provide this sheet to volunteers who make visits to the family.

On the Reports tab, click **All Reports** > **Stewardship** > **Combined Time, Talent, and Treasure** > **Family Financial and Ministry Info**.

Pledge Form with Ministry Info

This report prints one page per family with detailed information about the ministries they're currently involved in. It also prints checkboxes for members to indicate which ministries they want to continue and blank lines where they can write in new ministries. There is also a place for them to make a financial pledge. This report is useful if you are combining a drive for increased ministry and sacrificial giving at the same time.

On the Reports tab, click **All Reports** > **Stewardship** > **Combined Time, Talent and Treasure** > **Pledge Form with Ministry Info**.

Blank Pledge Form

This report prints one or more blank pledge forms than you can distribute to families so they can pledge money and/or sign up for a ministry.

On the Reports tab, click **All Reports** > **Stewardship** > **Combined Time, Talent and Treasure** > **Blank Pledge Form**.

Breakdown by Involvement

This report is an overview of how involvement in ministry affects giving. It prints statistics using a breakdown of the family's total contribution, the number of families with members involved in zero ministries, and the number of families with members involved in at least one ministry.

On the Reports tab, click **All Reports** > **Stewardship** > **Combined Time, Talent and Treasure** > **Breakdown by Involvement**.

Conclusion

It's important to keep the stewardship message and the progress of the project before your membership. With Church Office, you can easily compose follow-up letters to send to your members. Over a period of time, you will develop your own library of letters, which respond to special needs or situations.

In order for this process to be effective over a period of time, you must repeat it each year at the same time. In order to make the next year more effective, we recommend that you review each step in the process and develop a book of procedures. Data from the previous year sets the stage for what you can accomplish in the next year.

We developed the Stewardship Library of Reports to assist parishes increase members' ministerial involvement and contributions. As you use this program, you will discover unique ways to handle situations for your parish. We invite you to add your suggestions to this guide so that you can share your experiences with other parishes.

Don't See What You Need?

If you have any questions, please contact PDS Support at 1-877-737-4457.