

Catholic Services Appeal 2007
Conducting & Processing
The In-pew Effort: October 13/14, 2007

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This information and additional materials are also available at www.archlou.org

1. What is the In-pew effort and why??

The In-pew effort is a component of the Catholic Services Appeal that allows for parish participation in a communal way. During the 2007 Appeal, parishes are asked to conduct the In-pew effort at Masses on the weekend of **October 13th and 14th**.

Supplies: Each parish is supplied with pre-printed In-pew gift envelopes and pencils based on average reported attendance. The process for conducting the effort is outlined in Section 2.

The process for conducting the In-pew effort is based on successful models in use around the country by several dioceses. The process has been designed to place a minimal burden on the parish staff and appeal team while maximizing the opportunity to generate gifts and new donors.

The Office of Stewardship and Development is available to assist parishes with any questions or concerns on processing In-pew gifts.

Why conduct the In-pew effort?

The In-pew effort has proven to be an effective way to increase donor participation and gifts to the Catholic Services Appeal. More importantly, the In-pew process reengages former donors as well as those who have never made a gift to the appeal or who are not registered as a member of a parish.

Last year, parishes reported gifts and pledges from the In-pew process ranging in size from \$1 to \$2,000. One parish collected over \$18,000 in gifts and pledges from 90 donors in one weekend. Another much smaller parish raised over \$10,000 from 142 donors in the course of two weekends.

In 2006, the In-pew method produced an overall result of over \$325,000 in gifts and pledges to the Catholic Services Appeal.

2. Conducting the In-pew Effort at Mass

The following steps will guide you through conducting the In-pew process in your parish. While each parish is free to determine how to conduct its own In-pew procedure, the following steps will help ensure a smooth process.

Before the In-pew effort weekend:

Before the In-pew weekend arrives, the pastor or Catholic Services Appeal parish chairperson should familiarize themselves with the entire process. They should also ensure that:

- The Appeal team member who will lead parishioners through the process is familiar with the process and script
- Ushers are aware of what special items will need to be distributed and collected during Mass
- Parish office staff and volunteers are prepared to process the In-pew gifts after they are collected
- Music ministers are consulted and made aware that appropriate music may be needed during the In-pew process

During In-Pew Weekend, October 13/14:

Before Mass: Before the Mass begins, the pastor, Appeal chairperson, or designated Appeal team member should consult with ushers to ensure that the needed supplies are prepared and available.

During Mass:

Step 1- Appeal from homilist - The homilist is asked to include a personal appeal for support of the Catholic Services Appeal in their homilies on October 13th / 14th.

Step 2- Instructions from Appeal Team Member - At the conclusion of the homily, the homilist indicates that those who have not yet responded with a gift to this year's appeal will now have the opportunity to do so. A designated member of the parish appeal team should be invited to come forward to explain how to complete the In-pew envelope. (Please see In-pew presentation Script on page 8).

Note: By conducting the effort immediately after the homily, appeal gifts can be included in the community's offertory to God

Step 3- The speaker invites the ushers/hospitality ministers to come forward and distribute the In-pew envelopes and pencils. During the envelope distribution, the speaker should instruct parishioners to refrain from completing the envelope until all of the envelopes have been distributed. He / she can use this time to discuss the option of making a pledge over a period of time or explain the various giving options.

Note: It is recommended that envelopes and pencils not be placed in the pews prior to this time in the Mass. Children will have a tendency to mark up or play with the pledge envelopes.

Step 4- Once the envelopes have been distributed, the speaker will invite one member of each household to open the envelope flap and follow along as the speaker reviews the

information and instructions for completing the form. Ask parishioners to refrain from filling out the envelope until instructed to do so (see In-pew Leader's Script on page 8).

Step 5- The speaker should explain each section beginning with name, address, and parish information on the bottom half of the inside panel.

Note: While we would prefer that each household indicate their name and current address, donors wishing to remain anonymous may leave their envelope blank or simply write "anonymous."

Step 6- The speaker should point out the box below the personal information section that can be checked if the household has already mailed a gift or pledge to the appeal. If that box is checked, the household does not need to complete any other part of the In-pew envelope.

Step 7- After explaining the gift giving options and referring to the sample pledge chart, (see In-pew Leader's Script on page 8), the speaker should invite the parishioners to take a few minutes to prayerfully reflect and complete the form. Remind the parishioners that every gift makes a difference.

Note: The choir musicians should play appropriate offertory music while parishioners are completing the pledge portion of the envelope.

Step 8- Once a sufficient amount of time has passed, the speaker should thank the people for their generosity and time and instruct them to place their gifts in the collection basket at the Offertory. Remind donors to place their Appeal gifts in the designated In-pew envelopes to distinguish these gifts from the regular parish offertory.

Note: Parish may wish take a separate collection for the In-pew effort; this is left entirely to the discretion of the parish.

After Mass: Once the Mass has ended, the pastor, appeal chairperson, or designated appeal team member should ensure that envelopes are delivered to the location where they will be processed and secured. Ushers/hospitality ministers should remove any remaining envelopes and pencils from the pews and ensure that supplies are sufficient for any remaining Masses.

In-pew Follow-up Weekend, October 20/21

The weekend of October 20 and 21 has been designated as In-pew follow-up weekend. Parishes are asked to either conduct the In-pew process again or to conduct a shortened version of the process. This provides an additional giving opportunity for any parishioners who may have been absent on In-pew weekend.

Again, parishes are free to modify the process as they see best; however, we ask that all parishes conduct the In-pew effort on the weekend of October 13th and 14th.

Please see the proposed In-pew Leader's Script on page 8.

3. Processing In-pew Envelopes

Getting Started:

- It is suggested that In-pew gifts be processed at the same time as the regular weekend collection. You may wish to utilize members of your parish Catholic Services Appeal team to supplement your regular collection counting team.
- Some donors may return their original pledge forms from the Archdiocese through the parish on the In-pew Weekend. These gifts can be processed and included in the same groups as the In-pew envelopes.
- Please be sure the collection counting team and parish staff understand the sorting and handling procedure below. Please do not hesitate to call the Office of Stewardship and Development at (502) 585-3291 with any questions or concerns.
- Parishes may wish to have a parish listing available to check off the names of those who respond to Catholic Services Appeal with an In-pew gift. This can help with follow-up efforts by avoiding contacting individuals who have already responded.

Sorting and Grouping In-pew Envelopes/Pledge Forms

Step 1- Separate Catholic Services Appeal In-pew gifts from the regular parish offertory.

Step 2- Open sealed In-pew envelopes by slitting the envelope **along the top fold**. Since gift information may be contained on the foldover flap, be sure it remains attached to the In-pew envelope via the envelope's adhesive strip, or use tape if necessary. Leave the contents inside the envelopes at this time.

Note: An envelope opener is included in your parish kit.

Step 3- Sort the In-pew envelopes into the following groups:

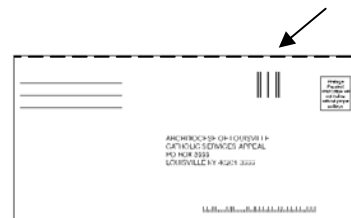
Group A - Envelopes containing Cash (*actual money*)

Group B - Envelopes containing a Check

Group C - Other Types of Gifts (*credit card, automatic bank transfer, stock gifts or pledges where no cash or check was enclosed.*)

Group D - Already responded with a gift or will not be making a gift to the Appeal.

Step 4- Verify that personal (name and address) and parish information is completed on the lower inside panel of the envelope. Some cash gifts may be anonymous; however, be sure the parish name is written inside the envelope.



Step 5- Processing each gift group:

Group A. In-pew Envelopes Containing Cash

- Any loose cash received is to be treated as a Group A gift.
- Before removing cash from envelope for deposit, be sure to verify that the cash amount is correctly listed on the “**Amount Enclosed**” line. Some gifts may be cash and pledges, so the donor may have a remaining balance. Be sure to include these envelopes in Group A.
- Once all Cash Gift envelopes have been verified, please have one person count the actual cash on hand while a second person runs a calculator tape on the “**Amount Enclosed**” line on the envelopes. The total cash on hand **must match** the “Amount Enclosed” total from the calculator tape. Mark the calculator tape “Group A.”
- List **Total Cash on Hand** and the **number of envelopes** on the **In-pew Parish Gift Transmittal Form** for Group A (Cash Gifts). Attach the calculator tape to the transmittal form.
- Rubber band Group A, (cash gift) In-pew envelopes (and pledge forms, if any) together and set aside for the parish office to send in with a parish check.
- **Cash is to be deposited into the parish bank account. The parish office is to mail a parish check for the total amount of the cash deposited along with the “Group A” envelopes and the transmittal form to the Archdiocese no later than Friday, October 19th.** (Please see mailing instructions in step 6.)



Group B. In-pew Envelopes Containing Checks

Please do not remove checks from In-pew envelopes unless it is necessary to verify the signature and check amount. Checks must be left in their individual In-pew envelopes for final processing.

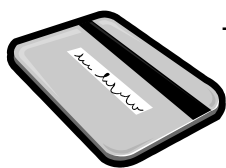
- Verify that the enclosed check is signed and that the check amount matches the amount listed in the “**Amount Enclosed**” line.
- *If a check is unsigned, parishes are asked to contact the donor and arrange for a signature. Set the check and In-pew envelope aside and notify the parish office. Please do not process or forward the gift to the Archdiocese until the check has been signed.*
- After verifying that checks are signed and check amounts match the amount listed in the “**Amount Enclosed**” line, run a calculator tape on the “**Amount Enclosed**” line on all Group B In-pew envelopes (and any pledge forms, if any). Mark the tape as “Group B.”
- List the number of Group B envelopes on the Transmittal Form and indicate the total amount from the calculator tape in the “Total Amount of Checks Enclosed” line on the Transmittal Form. Attach the calculator tape to the transmittal form.



- Rubber band together all “Group B” In-pew envelopes leaving checks (& pledge forms, if any) inside the In-pew envelopes. These “Group B” envelopes are to be placed in one of the large white, mailing envelopes provided in your parish kit. Each white envelope should hold up to 500 In-pew envelopes. (Please see mailing instructions in step 6.) Use additional large envelopes if necessary, but **please complete a separate transmittal form for each large envelope.**

Group C. Other Types of Gifts (envelopes that do not contain cash or checks)

These will include In-pew envelopes indicating credit card, automatic bank transfer, stock gifts or pledges for future payments.



- Leave any voided checks or notes from donors inside envelopes.
- Run a calculator tape on the amount listed in the “**Total Gift**” box on the In-pew envelope (and pledge forms, if any). Mark the tape as “Group C” and attach the tape to the Transmittal Form for Group C gifts.
- List the number of Group C envelopes on the Transmittal Form and indicate the total amount from the calculator tape on the “Total Amount” line on the Transmittal Form.
- Rubber band together all Group C gifts and, space permitting, place in the same large white envelope as Group B gifts. (Please see mailing instructions in step 6.)

Group D. Already responded with a gift/no gift to the Appeal

These will include In-pew envelopes where the donor has either checked the box indicating that they have already responded with a gift to the appeal or that they will not be making a gift this year.

- Verify that the parish name is included on the lower inside of the In-pew envelope.
- List the number of envelopes in Group D on the Transmittal Form.
- Rubber band together all Group D envelopes and, space permitting, place in the same large, white envelope as the Group B and C envelopes. (Please see mailing instructions in step 6.)

Step 6- Mailing In-pew envelopes and Transmittal Forms to the Archdiocese

Your parish kit contains a number of large, white mailing envelopes for use in mailing the In-pew envelopes and Transmittal Forms to the Archdiocese.

- Mail Group A (cash gift) In-pew envelopes along with a completed Transmittal Form and **parish check** for the total amount of cash received to the Archdiocese no later than Friday, October 19th. Be sure to retain a *copy* of the Transmittal Form for parish records.
- Mail Groups B, C, and D In-pew envelopes along with a completed Transmittal Form to the Archdiocese no later than Tuesday, October 16th. These 3 groups may be mailed in the same white mailing envelope. **If more than one mailing envelope is needed, be**

sure to enclose a Transmittal Form with information for only those In-pew envelopes contained in that particular mailing envelope. Be sure to retain a *copy* of the Transmittal Form for parish records.

- Due to the important nature of this mailing, parishes should use a postal service that has tracking capability.
- Please be sure to use mailing labels (see mailing address below) on the outside of the mailing envelope since ink or markers tend to smear when hand-written on the mailing envelope. Be sure that a parish return-address label is also affixed to the mailing envelope.
- All envelopes should be mailed to:

**Archdiocese of Louisville
Catholic Services Appeal
P.O. Box 3999
Louisville, KY 40201-3999**



Note: Envelopes may be hand-delivered by the parish to the Chancery. Please be sure that envelopes are received by a member of the Finance Office.

Processing Appeal Gifts Received at Other Times

Appeal gifts may be received by the parish at other times throughout the months of October, November, and December. These gifts should be processed and forwarded to the Archdiocese in the same fashion as outlined above for the In-pew weekend. These gifts should be forwarded to the Archdiocese on a weekly basis with a new Transmittal Form.

Reminder: Cash gifts should be processed in the same manner as on the In-pew weekend, i.e. the cash is deposited into the parish bank account, and a parish check is sent to the Archdiocese.

REVIEW

- ⇒ **Sort gifts into 4 Groups.**
- ⇒ **Forward Group A (cash gifts) along with a parish check and the Transmittal Form by October 19th.**
- ⇒ **Forward Group B (check gifts), Group C (other types of gifts), and Group D (already made a gift or no gift) along with a Transmittal Form by October 16th.**
- ⇒ **Process gifts received at other times on a weekly basis using the same process as the In-pew weekend.**

In-pew Leader's Script

The following is a suggested script to use when conducting the In-pew effort on October 13th and 14th. Please feel free to edit in order to meet your particular parish's needs or situation or to draft a script tailored to your parish. This script is available from the Office of Stewardship & Development in electronic format for ease of editing.

Good (Morning/Afternoon/Evening)

My name is _____. I will be leading this portion of our Catholic Services Appeal today.

At this time, I would like to: (Option #1 below is the suggested option: however, the Parish may choose the option best suited for its needs.)

Option 1. Invite the ushers to come forward and distribute Catholic Services Appeal envelopes to each pew. Please take only one envelope per household.

Option 2. Ask that the envelopes located at the ends of the pews be passed throughout the pew. Please take only one envelope per household. If there are not enough envelopes in your pew, please raise your hand and an usher will bring more envelopes.

If you are visiting us today from another parish, you can still participate. Simply include your parish name in the appropriate spot on the envelope.

Please wait until the envelopes have been distributed and we've had a chance to review the instructions together before you begin to complete the information. I ask for your patience as we do this together as a parish family. Our giving together is a sign of our commitment as members of the Body of Christ.

The Catholic Services Appeal In-pew envelopes contain the same information as the pledge form recently mailed to all households by Archbishop Kurtz. If you've already responded to the Catholic Services Appeal, please take one of the In-pew envelopes anyway. You will be able to indicate that you have already made a gift to this year's Appeal. If you have brought your pledge form and gift with you today, then you will not need to complete one of the In-pew envelopes.

While the envelopes are being distributed, I would like to remind you that it is not necessary to make your full gift today or even a down payment. The In-pew envelope will provide you with the opportunity to make a **pledge gift**. This type of gift will allow you to make a gift that can be paid out in installments between **now and June, 2008**.

There are also several ways that you can make a gift to the Catholic Services Appeal. You can make a gift by:

- Check
- Cash
- MasterCard, Visa, Discover Card
- Automatic withdrawal from your bank account
- You can also make a gift of stock.

There is a box to check for each type of giving option on the inside panel of the envelope.

Now, please take the envelope that you just received and open the flap.

[Hold up a sample envelope to show the congregation the area that you want them to view.]

Please fill in your name, both first and last, current address, and your parish name. If you happen to go by a nickname, please be sure to give us your real name as well! If you are visiting us this weekend, **please be sure to indicate your home parish name**.

If you have already mailed in your gift to the Catholic Services Appeal, simply check the box indicating “I have made a gift” in the area below the parish name. There is no need to fill out the rest of the envelope.

[Pause briefly to allow people to fill in the name information]

Next, you will see the spaces for indicating your gift. Before you complete the gift information, we ask that you reflect on how you have been blessed by God and what gift or pledge you would like to make to support His work in our Archdiocese. Every gift is appreciated and put to good use.

The top box is for the **Total Amount** of the Gift that you intend to give. The middle line is for the actual **Amount Enclosed** in the envelope today. The bottom line is for the **Balance** that you wish to pay at a later date.

If you would like to make a gift pledge today, you may want to refer to the Sample Pledge Plan above the fold of the envelope.

Below the gift amount is the information on the various options for paying your balance.

- If making your gift or pledge by CHECK, please make the check payable to: **Catholic Services Appeal.**
- If you are making a gift by credit card or wish to arrange for an automatic withdrawal from your bank account, please be sure to complete the appropriate section above the fold [*point this out*] so that your gift can be properly processed by the Archdiocese.
- If you are intending to donate stock for your gift, please mark the stock box and advise your broker of your intended gift.

Now, please take the next few minutes to prayerfully complete your envelope.

[Please have your choir, cantor, or musicians play an appropriate offertory hymn during this period of silence. At the conclusion of the hymn, please conclude the process.]

Once you have completed the necessary information, please enclose your gift, then fold and seal the flap on your envelope. Please place your envelope in the collection basket with your regular Sunday offertory.

On behalf of the ministries and services of our Archdiocese, Archbishop Kurtz, Father (*insert pastor's name*), and the parish Appeal Team, I would like to thank you for your participation today, but more importantly, for your support of the work of our Archdiocese and those served by its ministries. [*Or other appropriate closing*]

In-pew / Parish Gift Processing At A Glance

1) **Group A** - In-pew Envelope/Gift containing **Cash**

- Verify amount enclosed and personal/parish information on In-Pew envelope
- Record total amount and number of envelopes on Parish Gift Transmittal Form
- Deposit Cash into parish bank Account
- Rubber band Group A In-pew envelopes and Transmittal Form
- Parish office to issue parish check for total cash amount deposited
- Send parish check,* Group A envelopes, and transmittal form to Archdiocese in a secure mailing envelope

2) **Group B** - Any In-pew Envelope/Gift containing a **Check**

- Leave check inside In-pew envelope
- Verify amount enclosed, check amount, and personal/parish information on In-Pew envelope
- Record total amount and number of envelopes on Parish Gift Transmittal Form
- Rubber band together Group B In-pew envelopes and Transmittal Form
- Send Group B** envelopes and Transmittal Form to Archdiocese the next day in a secure mailing envelope

3) **Group C** - Any In-pew Envelope/Gift **not containing** cash or check

(credit card, automatic bank transfer, stock gift or pledge)

- Leave any additional paperwork, voided checks, or notes inside donor envelope
- Verify “Total Gift” amount and personal/parish information on In-Pew envelope
- Total amounts listed as “Total Gift”
- Record total amount and number of envelopes on Parish Gift Transmittal Form
- Rubber band together Group C In-pew envelopes and Transmittal Form
- Send Group C** and Transmittal Form to Archdiocese the next day in a secure mailing envelope.

4) **Group D** - Any In-pew Envelope/Gift marked “**Gift Already Made**” or “**No Gift**”

- Leave any notes from donor inside the envelope
- Verify personal/parish information on In-Pew envelope
- Record number of Group D envelopes on Parish Gift Transmittal Form
- Rubber band together Group D In-pew envelopes and Transmittal Form
- Send Groups D** and Transmittal Form to Archdiocese

*Group A should be mailed with separate Transmittal Form by October 19 or as soon as parish check is available.

**Groups B, C, and D may be mailed together (in the same envelope) on the day after the collection is taken, if they will fit in the same mailing envelope. Otherwise, please complete separate Transmittal Forms for each envelope.

In-pew Gift Transmittal Form

Finance Office Use	
Date Received:	_____
Verified By:	_____
Batch #	_____

Please review instructions on the opposite side of this sheet. Expanded instructions are available in the "Guide to Conducting and Processing the In-pew Effort." Complete sections for all gift types that you will be mailing along with **this** transmittal form only.

Parish Name:	_____	Parish ID #:	_____
Prepared By:	_____	Phone #:	_____
E-mail:	_____	Date Gifts Received at Parish:	____/____/____

<u>Group A: Cash Gifts</u>	Parish check and Group A envelopes from In-pew weekend to be mailed by October 19
Total Number of Envelopes Enclosed: _____	
Total Cash received in envelopes:	\$ _____
Total Cash received as loose:	\$ _____
*Total Cash deposited for Appeal: \$ _____	
Parish Check # _____	*Parish Check Amount \$ _____
<small>*Parish check amount should match the Total Cash deposited for Appeal and should be mailed with Group A envelopes & Transmittal Form</small>	

<u>Group B: Check Gifts</u>
Total Number of Envelopes Enclosed: _____
Total Amount of Checks Enclosed: \$ _____

<u>Group C: Other Gifts</u>	(credit card, bank transfer, or pledges <u>without</u> cash/check enclosed)
Total Number of Envelopes Enclosed: _____	
Total Amount of "Total Gift" box: \$ _____	

<u>Group D: Gift Already Made/No Gift</u>
Total Number of Envelopes Enclosed: _____

Each package of In-pew envelopes mailed to the Archdiocese should be sent with a **separate** transmittal form reflecting the contents of that package only. A new transmittal form should be sent each time gifts are processed and mailed to the Archdiocese. Make additional copies of this form as needed. Contact the Office of Stewardship & Development at (502) 585-3291 with any questions.

In-pew Envelope Processing Flow Chart

