Diocese of Lansing
GIFT PROCESSING PROCEDURES
DSA GIFT PROCESSING FORMS

- Pledge Forms
- Transmittal Cards
- Batch Cards
- Payments on Previous Pledges Form
- Transmittal Summary
CASH OR CHECK PLEDGE FORM*
* CREDIT CARD/EFT GIFTS, USE OTHER SIDE OF FORM.

Name ________________________________________________
Mr/Mrs/Ms  First Name  Spouse Name  Last Name

Address __________________________________________________

City/State/Zip ________________________________________________

Preferred Phone ________________________________________________

Preferred Email ________________________________________________

Please credit my gift to ___________________________________________
Parish Name  Parish City

Total Pledge Amount $____________________
Amount Paid Now $____________________
Total Pledge Balance $____________________

I wish to make my pledge payments monthly in months checked below, please send me pledge reminders.

☑ May  ☑ June  ☑ July  ☑ August  ☑ September  ☑ October
☑ November  ☑ December  ☑ January 2021

Parish Use Only
Donor Identification Label
CASH OR CHECK PLEDGE FORM*
* CREDIT CARD/EFT GIFTS, USE OTHER SIDE OF FORM.

Name _______________________________________________
Mr/Mrs/Ms  First Name  Spouse Name  Last Name

Address ________________________________________________

City/State/Zip ____________________________________________

Preferred Phone __________________________________________

Preferred Email ____________________________________________

Please credit my gift to _______________________________________
Parish Name  Parish City

Cash Gift
Check (Payable to: Your Parish Name/DSA)

Total Pledge Amount $____________________
Amount Paid Now $____________________
Total Pledge Balance $____________________

I wish to make my pledge payments monthly in months checked below, please send me pledge reminders.

- May  - June  - July  - August  - September  - October
- November  - December  - January 2021

Parish Use Only
Donor Identification Label
# CASH OR CHECK PLEDGE FORM*

* CREDIT CARD/EFT GIFTS, USE OTHER SIDE OF FORM.

<table>
<thead>
<tr>
<th>Name</th>
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<tbody>
<tr>
<td>Mr/Mrs/Ms</td>
<td>First Name</td>
<td>Spouse Name</td>
<td>Last Name</td>
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</tbody>
</table>

**ANONYMOUS**

- Cash Gift
- Check (Payable to: Your Parish Name/DSA)

| Total Pledge Amount | $____________________ |
| Amount Paid Now     | $____________________ |
| Total Pledge Balance| $____________________ |

I wish to make my pledge payments monthly in months checked below, please send me pledge reminders.

- May
- June
- July
- August
- September
- October
- November
- December
- January 2021

Please credit my gift to ____________________________________________

Parish Name  Parish City

Parish Use Only
Donor Identification Label
CREDIT CARD/EFT PLEDGE FORM

Name ____________________________
Mt/Mrs/Ms    First Name    Spouse Name    Last Name

Address ________________________________________________________________

City/State/Zip _________________________________________________________

Preferred Phone _______________________________________________________

Preferred Email _______________________________________________________

Total Pledge Amount $__________________

Amount Paid Now    $__________________ (Cash or Check only)

Total Pledge Balance $__________________

I am planning to go online to fulfill my pledge balance via:

☐ Credit Card    ☐ EFT

If you wish to pay by Credit Card or to have funds automatically withdrawn from a bank account (EFT), please complete this pledge card to assure your gift is added to your parish pledge total. We will use your email address to send you a link to our secure giving page where you may complete your gift and select your terms of payment. The gift page may be accessed by clicking the “Make a Gift” tab at www.dioceseofansing.org.
CREDIT CARD/EFT PLEDGE FORM

Name ____________________________
Mr/Mrs/Ms First Name Spouse Name Last Name

Address ____________________________

City/State/Zip ____________________________

Preferred Phone ____________________________

Preferred Email ____________________________

Please credit my gift to ____________________________
Parish Name Parish City

Total Pledge Amount $ ______________
Amount Paid Now $ ______________ (Cash or Check only)
Total Pledge Balance $ ______________

I am planning to go online to fulfill my pledge balance via:

☐ Credit Card  ☐ EFT

If you wish to pay by Credit Card or to have funds automatically withdrawn from a bank account (EFT), please complete this pledge card to assure your gift is added to your parish pledge total. We will use your email address to send you a link to our secure giving page where you may complete your gift and select your terms of payment. The gift page may be accessed by clicking the “Make a Gift” tab at www.dioceseoflansing.org.
Mr. and Mrs. James Doe
1234 Main Street   4567 Gibson Drive
Lansing, MI 48933   48934
SORTING THE BATCH

Sort all gift/pledge forms into the following categories:

- Gifts Paid in Full – Cash or Check
- Pledges – Cash or Check WITH DOWN PAYMENT
- Pledges – Cash or Check WITH NO DOWN PAYMENT
- Pledges – Credit Card or EFT WITH NO DOWN PAYMENT
- Pledges – Credit Card or EFT WITH DOWN PAYMENT BY CASH OR CHECK ONLY
- Payments on Previous Pledges – Cash or Check Only

Not every batch will have gifts in each category.
CORRECT I.D.

NEW PARISHIONERS

ADDRESS CHANGE
GIFTS FOR OTHER PARISHES

DECLINED DECEASED
# Payments on Previous Pledges Form

Parish number: ____________________ Parish name: ____________________

Report number: __________________ Report date: ____________________

## Cash/Check Payments on Previous Pledges

<table>
<thead>
<tr>
<th>Donor Number</th>
<th>Donor Name</th>
<th>Check #</th>
<th>Amount</th>
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<tbody>
<tr>
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</tbody>
</table>

Transfer total to transmittal summary and total cash/checks.
<table>
<thead>
<tr>
<th>Category</th>
<th># Cards</th>
<th>Pledged</th>
<th>Paid Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gifts Paid in Full – Cash or Check</td>
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</tr>
<tr>
<td>Pledges - Cash or Check with Down Payment</td>
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<td></td>
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<tr>
<td>Pledges - Cash or Check with No Down Payment</td>
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<tr>
<td>Pledges - Credit Card or EFT with No Down Payment</td>
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<tr>
<td>Pledges - Credit Card or EFT with Down Payment by Cash or Check Only</td>
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<tr>
<td>Payments on Previous Pledges</td>
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</tr>
</tbody>
</table>

**Total Amount Pledged** # _____ $ _________

**Total Amount Paid Now** $ _________

**Total Amount Enclosed** $ ______________ Parish Check # ______________

The total amount paid now and the total amount enclosed must be the same.

- Total Number of Gifts for Other Parishes # __________ Total Amount Paid $ __________
- Please do not add gifts for other parishes & cash paid for other parishes in with your above totals
- Enter these items — only on the two blank lines in this box.
# TRANSMITTAL SUMMARY

<table>
<thead>
<tr>
<th>Batch #</th>
<th>Total # of Gifts</th>
<th>Amount Pledged</th>
<th>Amount Enclosed</th>
</tr>
</thead>
</table>

**WITH NO DOWN PAYMENT**

<table>
<thead>
<tr>
<th>Date</th>
<th>Parish #</th>
<th>Parish Name</th>
<th>Parish City</th>
<th>Contact Person</th>
<th>Phone</th>
</tr>
</thead>
</table>

**Cash or Check**

<table>
<thead>
<tr>
<th>Gifts Paid in Full — Cash or Check</th>
<th># Cards</th>
<th>Amount Pledged</th>
<th>Amount Paid Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pledges - Cash or Check with Down Payment</td>
<td># ______</td>
<td>$ __________</td>
<td>$ __________</td>
</tr>
<tr>
<td>Pledges - Cash or Check with No Down Payment</td>
<td># ______</td>
<td>$ __________</td>
<td></td>
</tr>
</tbody>
</table>

**Credit Card or EFT**

| Pledges - Credit Card or EFT with No Down Payment | # ______ | $ __________ |
| Pledges - Credit Card or EFT with Down Payment | # ______ | $ __________ | $ __________ |

**Payments on Previous Pledges**

| Cash or Check Only | $ __________ |

**Total Amount Pledged**

| # ______ | $ __________ |

**Total Amount Paid Now**

| $ __________ |

**Total Amount Enclosed**

| $ __________ | Parish Check # __________ |

The total amount paid now and the total amount enclosed must be the same.

- Total Number of Gifts for Other Parishes # __________ Total Amount Paid $ __________
- Please do not add gifts for other parishes & cash paid for other parishes in with your above totals
- Enter these items — only on the two blank lines in this box.
MAILING BATCHES TO THE CATHOLIC FOUNDATION

Please check the following before mailing batches to The Catholic Foundation:

All gift/pledge forms are sorted into the proper categories and placed into bundles.

Each bundle has the appropriate **TRANSMITTAL CARD** on top of bundle.

Each bundle is further sorted and separated by the colored **BATCH CARD** sub-categories.

All gift/pledge forms in each category or sub-category are sorted in alphabetical order by donor’s last name.
MAILING BATCHES
TO THE CATHOLIC FOUNDATION

Please check the following before mailing batches to The Catholic Foundation:

KEEP THE TOP SHEET of each TRANSMITTAL CARD and TRANSMITTAL SUMMARY SHEET at the parish.

ATTACH THE BOTTOM SHEET of each TRANSMITTAL CARD to the appropriate bundle of gift/pledge forms, along with the proper colored BATCH CARDS.

INCLUDE THE BOTTOM SHEET of the TRANSMITTAL SUMMARY SHEET with your batch.

INCLUDE THE BOTTOM SHEET of the PAYMENT ON PREVIOUS PLEDGES FORM, if you received any - you should keep the top sheet of the form.
MAILING BATCHES TO THE CATHOLIC FOUNDATION

Please check the following before mailing batches to The Catholic Foundation:

**DO NOT ENCLOSE OR MAIL ANY CASH OR CHECKS FROM YOUR PARISHIONERS.** Deposit all DSA cash and checks received from your parishioners to a parish account, then make a check payable to The Catholic Foundation in the sum of the amount of DSA gifts deposited.

Your batch should be mailed, along with your parish check made payable to The Catholic Foundation, in the DSA TRANSMITTAL ENVELOPE.

Gifts received for other parishes should be sent directly to The Catholic Foundation. These are reported in the highlighted section on the bottom of the Transmittal Summary and are **NOT** included in your parish totals.
Friday Email Update to Parishes:
The Diocese of Lansing will send an email to parishes each Friday reporting parish DSA totals.

In the interest of accuracy, we will publish parish totals after batches are received in the mail and reconciled at the diocese.

This process will greatly diminish the chance of reporting inaccurate weekly totals.
IMPORTANT CONTACT INFORMATION

The Catholic Foundation team is here to serve you. We want your parish to be successful in meeting and exceeding your parish goal this year. Please contact one of our team members if you have questions or need assistance with DSA.

If you have questions regarding address changes, whether or not a donor has made a pledge, or for donors needing assistance with Credit Card or EFT gifts, please contact: **Donor Services**
Email: donorservices@dioceseoflansing.org  •  Telephone: 517.253.8792

All other DSA related questions/issues, please contact:
**Matt Hufnagel, Vice President of Development**
Email: mhufnagel@dioceseoflansing.org  •  Telephone: 517.253.8748
Thank You!