



Diocese of Palm Beach

Diocesan Services Appeal Information

(Also shared at January 10, 2023 training meeting)

1. Development Team
 - a. Thank you for your grace as we have a new team
 - b. Team rules of engagement (call donors back within 24 hours, excellent customer service, cultivate a culture of philanthropy, educate donors)
 - c. Jennifer Trefelner, APR, CPRC, Director of Communications and Development
 - i. (561) 775-9529, jtrefelner@diocesepb.org
 - ii. Responsible for DSA and Lumen Christi marketing, communications, overseeing appeals
 - d. Vito Gendusa, CPA, Chief Financial Officer
 - i. (561) 775-9518, vgendusa@diocesepb.org
 - ii. Responsible for DSA and Lumen Christi financial accounting and procedures
 - e. Gigi Silvagnoli, Administrative Assistant
 - i. (561) 775-9590, gsilvagnoli@diocesepb.org
 - ii. Responsible for being the Lumen Christi and DSA point of contact, processing gifts for Lumen Christi
 - f. Floricela Miguel-Roblero, Donation Processing Specialist
 - i. (561) 775-9526, froblero@diocesepb.org
 - ii. Responsible for processing donations from credit cards, bank authorization/direct debit, online donations, autopay checks
 - g. Paige Kelly, Donation Processing Specialist
 - i. (561) 775-9568, pakelly@diocesepb.org
 - ii. Responsible for processing donations of cash and checks with and without pledges, organizing transmittals
 - h. Lina Salcedo, Development Specialist
 - i. (561) 775-9519, lsalcedo@diocesepb.org
 - ii. Responsible for processing donations from foundations, matching gifts, stock gifts, running reports
 - i. Temp to help seasonally
2. What is the Diocesan Services Appeal
 - a. The Diocesan Services Appeal (DSA) is the annual fundraising campaign for the five-county Diocese of Palm Beach in which the faithful are asked by our Bishop to support our local church. The contribution support stretches

beyond the individual parishes and funds the projects run by the diocese. The DSA reminds us that we are all part of the Catholic family and that we need to support not just our individual parishes, but our diocese as well.

3. Recap of 2022 DSA
 - a. Goal met (but doesn't cover all expenses of the diocese)
 - b. Regularly scheduled Zooms with DSA contacts, visits to deanery meetings, focus groups
 - c. DSA in Action Materials
 - d. More robust communication tools
 - e. Now processing gifts of any amount
 - f. Strong social media presence by diocese
 - g. Called donors who did not fulfill their pledge
 - h. Website is now updated so donors can fulfill their pledges before the start of the new year
4. 2023 General Updates
 - a. New option for bilingual content
 - b. New and equal in-pew envelopes for Spanish and Creole
 - c. Redesigned in-pew envelopes
 - d. New way of updating donor profiles for all donors
 - e. New allocations of what the DSA supports
 - f. Thank you messages for parishes to use (from Bishop and beneficiaries)
5. Timeline review
 - a. Based on feedback from all our research
6. Materials to support the parish
 - a. <https://www.diocesepb.org/ministriesoffices/offices/development/diocesan-services-appeal/materials.html>
 - b. Social media graphics, power point slides, bulletin announcements, ambo announcements, video in three languages, vignette videos of each section, logos, QR code, poster template, Bishop's Letters, Ambo Announcements, Bulletin Text, bulletin graphics, brochure copies, pledge graphics, thermometer template, Transmittal Form, Parishioner Contact Information Form, Data Entry Procedures for Parishes
7. Processing gifts
 - a. Best case scenario: Donor uses card and envelope mailed to them OR
 - b. Parish deposits checks/cash and sends one check to the diocese
 - i. Parish opens in-pew or DSA envelope
 - ii. Place donor information label on in-pew envelope
 - iii. Deposit any cash or checks made to your parish (except if the check is a down payment for a credit card and Bank Authorization/Direct Debit pledge)

- iv. Fill out Transmittal Form and email a copy of the form to Development@DiocesePB.org
 - v. Mail check(s) via FedEx or UPS with tracking
 - vi. Check FTP site to confirm we received the check
 - c. Please send Transmittal Form and/or checks/cash to the diocese as soon as possible
 - d. If you receive cash without a name, plus use the word “Miscellaneous” as the “Donor Name” in the Transmittal Form
 - e. Please send voided check for direct debit
 - f. Please don’t deposit a check for the credit card and bank authorization
 - g. We can provide a second set of donor information labels if needed
 - h. Please do not send donors to your website to donate to the DSA
8. FTP Site
- a. New system for sharing donor contact/new parishioners (for parish to diocese and diocese to parish)
 - b. Pastor to contact the diocese of who has access and who should have access to the development folder
 - c. Friday reports now available on Thursday
 - d. Please ensure someone at your parish can check the FTP, so we do not have to email the reports separately
9. Thank you process for parishes
- a. No need for parishes to send thank you notes for DSA donations
 - b. DSA Donations more than \$2,500 are signed by the Bishop
 - c. Thank you notes are sent every other Friday once they are processed
10. Tax letters for DSA donation
- a. Parishes do not need to send the tax letters
 - b. The diocese will send them in January 2023 for 2022 gifts
11. Digital tools
- a. Please add a link the DSA on your parish’s website
 - b. You can also use the QR code on all materials
 - c. You can share the diocese’s social media posts promoting the DSA
12. How donors can give
- a. Please make checks payable to Diocese of Palm Beach- DSA
 - b. Donation envelope mailed to your home
 - c. In-pew envelope at your parish
 - d. Online at www.DiocesePB.org
 - e. Gifts of donor-advised funds/stocks (please use form)/bonds/individual retirement accounts/real estate
 - f. Check with your employer for gift matching opportunities
 - g. Gifts and pledges can be made using cash, check, credit card, debit card, direct debit/bank authorization, money order/cashier’s check

13. Donor categories
 - a. Donors can become a DSA Partner, which are those donors who exemplify leadership generosity for donating or pledging \$1,000 or more. The DSA Partner categories include gifts or pledges of:
 - b. \$2,500: Circle of Faith
 - c. \$5,000: Circle of Hope
 - d. \$10,000: Circle of Charity
 - e. \$25,000 Circle of Joy
14. How the diocese thanks donors
 - a. Thank you note (\$2,500 and up signed by Bishop)
 - b. New option for Florida Catholic in print once an month and/or digital version once a week
 - c. Easter Packet (card from Bishop and prayer card) mailed to donors above \$100 mailed: March 27, 2023
 - d. Easter phone call (any donor for past calendar year)
 - e. Thanksgiving Packet (card from Bishop and prayer card) mailed to donors above \$100 mailed: October 31, 2023
 - f. Christmas phone call (any donor from past calendar year)
15. Future plans for development in 2023
 - a. Provide IRA distribution resources
 - b. Employee payroll deduction program
 - c. Create planned giving/wills/trusts/estate planning resources
16. Thank you!

Updated January 11, 2023