

TAKE A STEP IN YOUR PLEDGE  
PARISH STEWARDSHIP  
**TIME. TALENT. TREASURE.**

# Processing the 2024 Stewardship of Treasure and Talent Campaigns in ParishStaq™

October 4, 2023

By: Bryan Gummersall

# Stewardship Prayer

Loving God, we come to you in thanksgiving, knowing that all we are and all that we have is a gift from you. In faith and love, help us to do your will.

We are listening, Lord God. Speak your words into the depth of our souls, that we may hear you clearly. We offer to you this day all the facets of our lives, whether it be at home, at work, or at school—to be patient, to be merciful, to be generous, to be holy. Give us the wisdom and insight to understand your will for us and the fervor to fulfill our good intentions. We offer our gifts of time, talent and possessions to you as a true act of faith, to reflect our love for you and our neighbors. Help us to reach out to others as you our God have reached out to us.

We pray this with grateful hearts in Jesus' name, Amen.

# Agenda

- ❖ Prayer
- ❖ Introduction
- ❖ The Campus Admins Group – Resource for Materials
- ❖ The Workflow for Processing Talent and Treasure Commitments
- ❖ Downloading the Letters and Instructions
- ❖ The Renewal Letters
- ❖ Customizing Processes
- ❖ Customizing Pledge Forms for Parishioners
- ❖ Entering Talent/Ministry Commitments
- ❖ Entering Treasure Pledges
- ❖ Online Giving Fund Name Mapping
- ❖ The Remainder of the Campaign

# Introduction

## Processing Treasure Campaign for this year is unique

- ❖ By next year's campaign, you will have full access to the Giving Portal and pledges will be entered there using Campaigns.
- ❖ We will be leveraging unique tools in ParishStaq™ this year:
  - Forms, Process Queues, People Search with Export to Excel

## Processing Talent Campaign

- ❖ We will be leveraging unique tools in ParishStaq™ this year:
  - Forms, Process Queues, People Search with Export to Excel

## Leveraging Microsoft™ Word

- ❖ Use the best tool for the job
- ❖ Word allows you to create more graphically pleasing letters/flyers
- ❖ You can export whichever fields you need in your letter directly from ParishStaq™
- ❖ You can email and print from a mail merge document

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# Campus Admins Group

Archdiocese of Seattle

Collapse Menu

- Home
- People
- Groups**
- Events
- Check-In
- Schedules & Plans
- Giving
- Forms
- Communication
- Reports & Metrics
- Settings

**Campus Admins** Leader  
354 participants | System

INFO MESSAGES CALENDAR **FILES** NEEDS PARTICIPANTS



Communication group for those staff members who are campus administrators for ParishStaq.  
See participant list for email contact links.

**Campus Admins** Leader  
354 participants | System

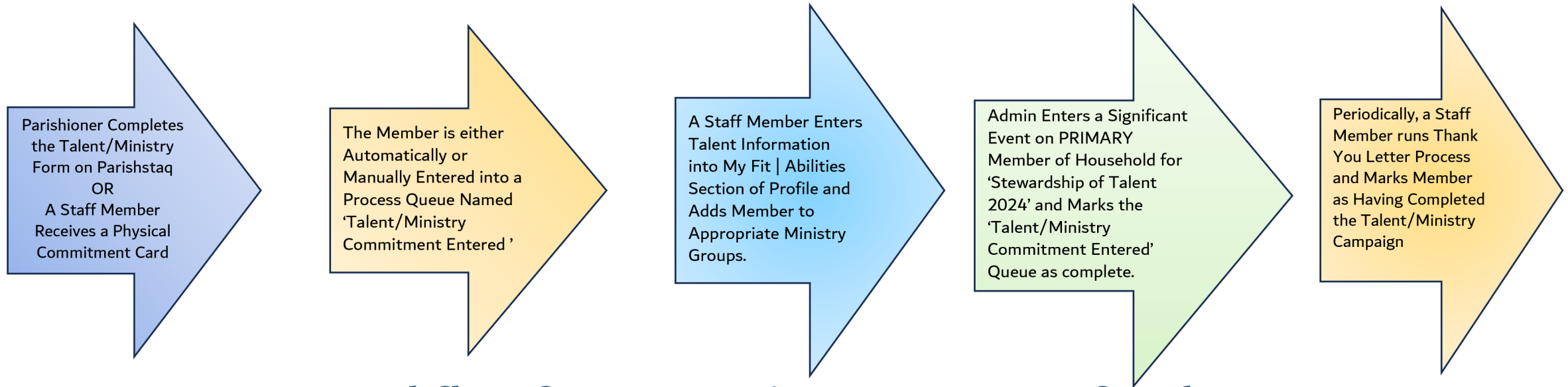
INFO MESSAGES CALENDAR **FILES** NEEDS PARTICIPANTS

- 2024 Stewardship of Treasure**  
Person: Bryan Gummersall  
Files and letters for the 2024 Stewardship of Treasure Campaign  
*23472024\_Stewardship\_of\_Treasure.zip, 3 MB, Created Sep 10, 2023, Modified Sep 28, 2023*
- 2024 Stewardship of Talent**  
Person: Bryan Gummersall  
Files and letters for the 2024 Stewardship of Talent Campaign  
*23462024\_Stewardship\_of\_Talent.zip, 3 MB, Created Sep 10, 2023, Modified Sep 26, 2023*

If you are responsible for the Stewardship Campaigns and you do not find the Campus Admins Group listed under your My Groups list, please email [parishstaq.support@seattlearch.org](mailto:parishstaq.support@seattlearch.org) to request membership.

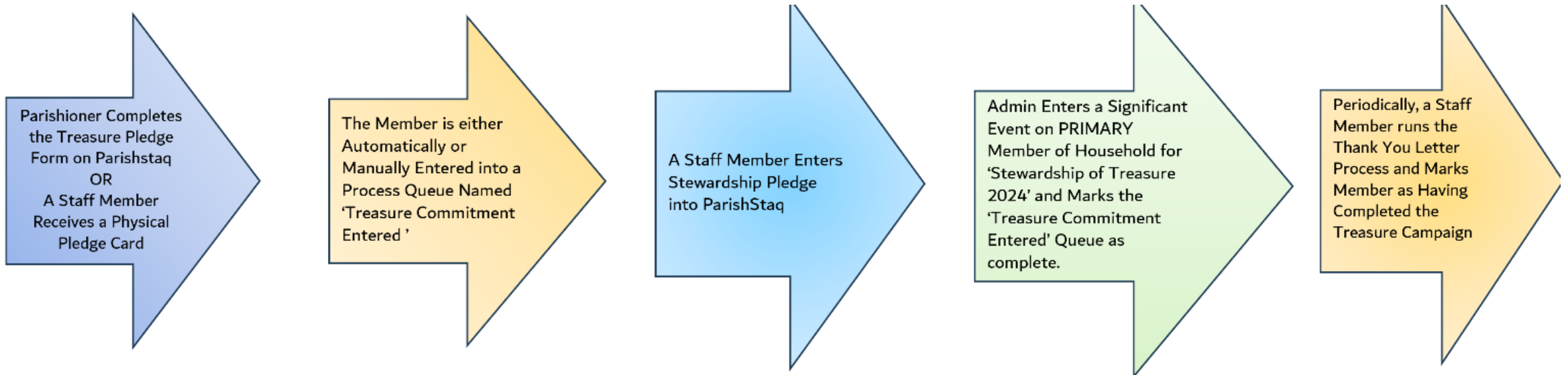
TAKE A STEP IN YOUR PLEDGE  
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# The Workflow for Processing Talent Commitments in ParishStaq™



**Workflow for Processing Responses for the 23-24 Talent/Ministry Campaign in ParishStaq™**

# The Workflow for Processing Treasure Commitments in ParishStaq™



## Workflow for Processing Responses for the 23-24 Treasure Campaign in ParishStaq™

# Downloading the Letters and Instructions

## Where are the Letters and Instructions?

- ❖ In ParishStaq, browse to the Campus Admins Group
- ❖ Click on Files
- ❖ The Zipped files for the Treasure and Talent letters and the Instruction Documents are the first 2 files in the list
- ❖ Be sure to **EXTRACT ALL** the Letters file after Downloading.

Campus Admins Leader  
354 participants | System

INFO MESSAGES CALENDAR **FILES** NEEDS PARTICIPANTS

**2024 Stewardship of Treasure**  
Person: [Bryan Gummersall](#)  
Files and letters for the 2024 Stewardship of Treasure Campaign  
23472024\_Stewardship\_of\_Treasure.zip, 3 MB, Created Sep 10, 2023, Modified Sep 29, 2023

**2024 Stewardship of Talent**  
Person: [Bryan Gummersall](#)  
Files and letters for the 2024 Stewardship of Talent Campaign  
23462024\_Stewardship\_of\_Talent.zip, 3 MB, Created Sep 10, 2023, Modified Sep 26, 2023



# The Campaign Letters

## Talent Campaign

### *The Letters*

The filenames for the ParishStaq Talent letters for 2023-2024 are listed below:

Letter Name	Filename	Report Type
ST (24) Renewal Campaign Letter	ST24Talent	<b>Family</b>
ST (24) Follow Up Letter	ST24TalentFU	<b>Family</b>
ST (24) Thank You Letter	ST24TalentTY	<b>Family</b>

**Note:** The Spanish letters have the same filenames as above, followed by ‘\_Spanish’ The Vietnamese letters have the same filenames as above, followed by ‘\_Vietnamese’

## Treasure Campaign

### *The Letters*

The filenames for the ParishStaq Treasure letters for 2023-2024 are listed below:

Letter Name	Filename	Action Date
Annual Report Cover Letter	ST24ARCL	September
Treasure Renewal Letter	ST24CPG	Week of Oct 23rd
Follow Up Letter #1	ST24FU1	Week of Nov 6th
Follow Up Letter #2	ST24FU2	Week of Nov 13th
Thank You Letter - Segmented	ST24TY	Wk of Nov 6th/13th and ongoing

**Note:** The Spanish letters have the same filenames as above, followed by ‘\_Spanish’ The Vietnamese letters have the same filenames as above, followed by ‘\_Vietnamese’

# The Renewal Letters *(both campaigns)*

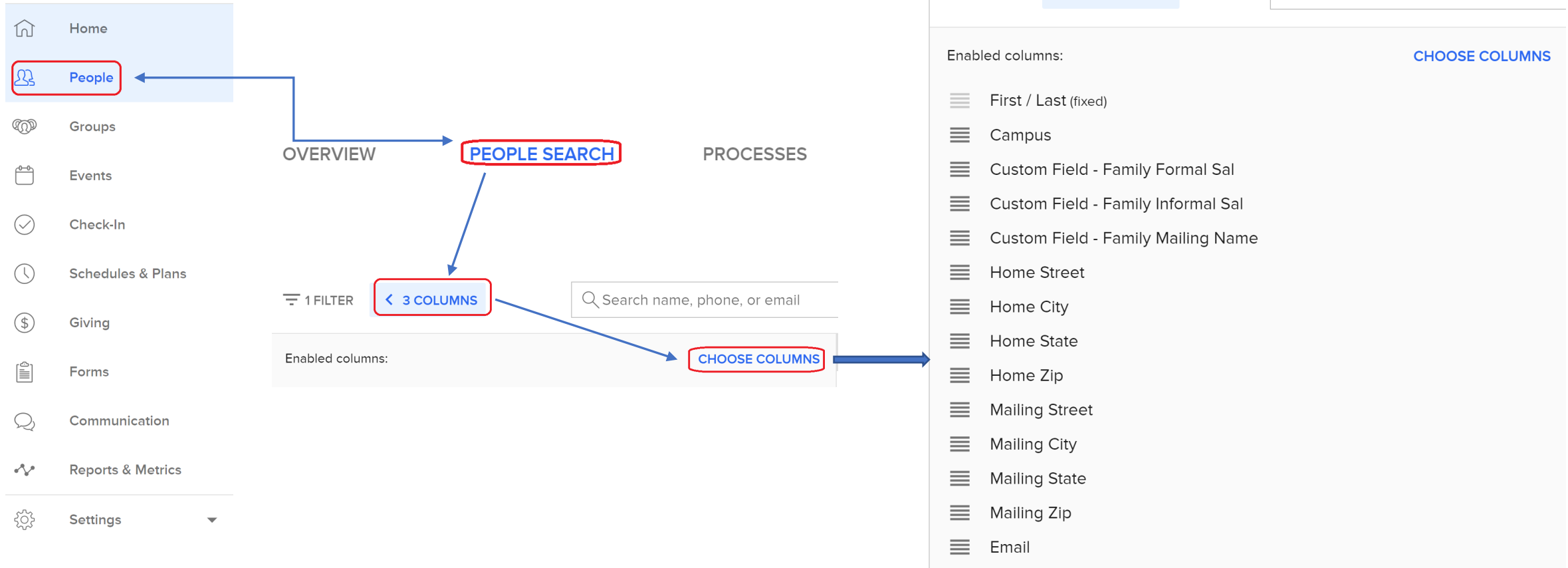
## Steps for Producing the Pastor Letter of Support

- ❖ Export list of Registered Parishioners
- ❖ Prepare for Mail Merge
- ❖ Merge Letters to the Printer or a New Document
- ❖ What if I want to send emails to those with email addresses?

*\*\*See Appendix B of Instruction Packet*

# The Renewal Letters: Export List of Registered Parishioners

## Step 1: Define List of Fields to Export



# The Renewal Letters: Export List of Registered Parishioners

## Step 2: Filter for your Registered Parishioners

- Home
- People**
- Groups
- Events
- Check-In
- Schedules & Plans
- Giving
- Forms
- Communication
- Reports & Metrics
- Settings

OVERVIEW

**PEOPLE SEARCH**

PROCESSES

< 2 FILTERS 4 COLUMNS Search name, phone, or email

SAVE SEARCH APPLY

CAMPUS SELECTION All Campuses RESET HIDE

DISPLAY IN RESULTS  People matched in the search  Primary contact in their family  Spouse in their family  Children in their family  Others in their family

REFINE BY  Include active profiles  Include inactive profiles  Include deceased individuals  Include unlisted individuals  Include "Child Protected" individuals

Apply filters below: CLEAR FILTERS

Match All

Membership Type Is Registered

Family Position Is Primary

Refine By: Name

# The Renewal Letters: Export List of Registered Parishioners

## Step 3: Actions | Export List

The screenshot displays the 'People' management interface in ParishStaq. At the top, there are tabs for 'OVERVIEW', 'PEOPLE SEARCH' (which is active), and 'PROCESSES'. Below the tabs, there is a 'SAVED SEARCHES' section with a dropdown arrow and a document icon, and a '+ CREATE PROFILE' button with a person icon. The main area features a search bar with the placeholder text 'Search name, phone, or email' and '1314 Results' displayed to its right. A red box highlights the 'ACTIONS' dropdown menu. An arrow points from this menu to a larger, detailed view of the dropdown options. The 'Export' option is highlighted with a red box, and its sub-menu 'Export List' is also highlighted with a red box. Other options in the main dropdown include 'Edit Profiles', 'Edit Sacraments', 'Add To Group', 'Add To Event', 'Add To Process', 'Send An Email', 'Send A Mail Merge', and 'Print Labels'. The sub-menu for 'Export' includes 'Export List' and 'Export Options'.

# The Renewal Letters: Review Recipients

## Step 4: Review Excel Worksheet

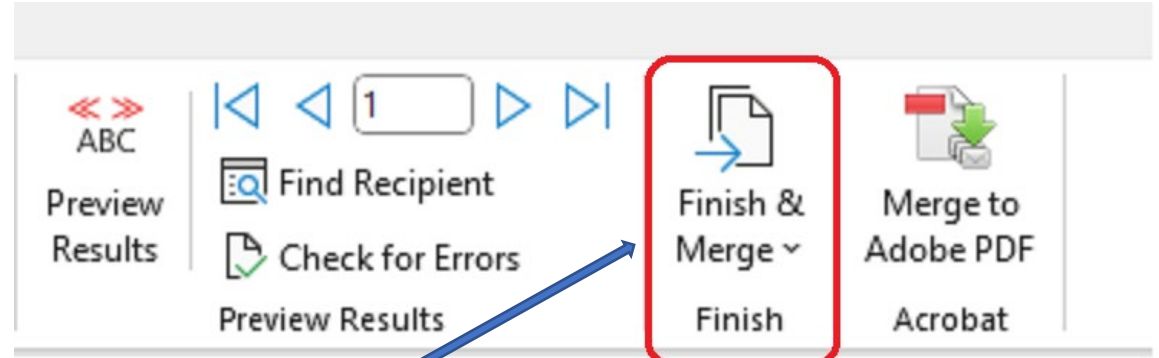
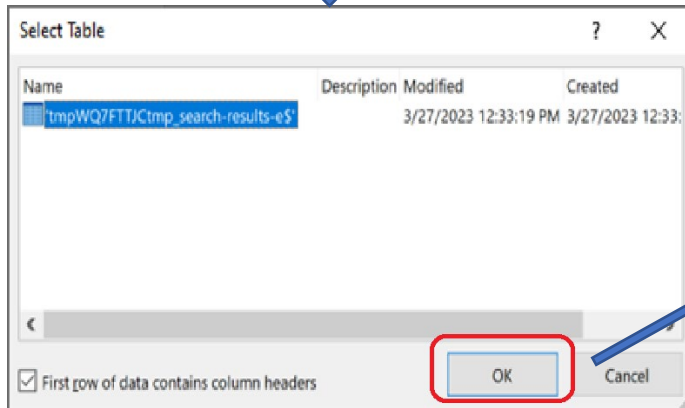
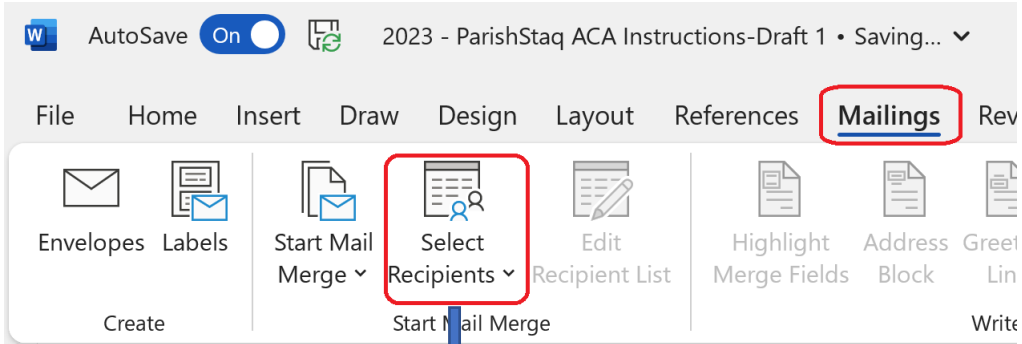
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Individual	First Name	Last Name	Campus	Custom Fields - Family Formal Sal	Custom Fields - Family Informal Sal	Custom Fields - Family Mailing Name	Email	Home Street	Home City	Home Stat	Home Zip	Mailing Street	Mailing Cit	Mailing St	Mailing Zip
2	180464	Sample	Parishioner (002) A	Assumption (Seattle)	Mr. Sample Parishioner (002) A	Sample	Mr. Sample Parishioner (002) A	email@en	1234 Anywhere Lane		WA	98115	1234 Anywhere Lane	Seattle	WA	98115
3	180624	Sample	Parishioner (002) B	Assumption (Seattle)	Sample Parishioner (002) B	Sample	Sample Parishioner (002) B	anotheren	4567 My Street	Seattle	WA	98115	4567 My Street	Seattle	WA	98115
4																

❖ We use the following fields in our mail merge letter, so make sure these are populated properly for all rows:

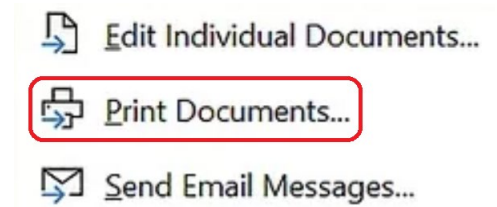
- Custom Fields - Family Mailing Name
- Custom Fields - Family Informal Sal
- Mailing Street
- Mailing City
- Mailing State
- Mailing Zip
- Email \*only used if doing an email mail merge

# The Renewal Letters: The Mail Merge

## Step 5: Complete the Mail Merge



If you'd like to email the letters instead of printing, see Appendix C in the ACA Instruction Packet for detailed instructions.



# Customizing Commitment Forms and Processes

## Step #1: Request Form and Process:

Your first step after downloading the campaign letters and instructions is to request the Stewardship of Treasure and/or Talent Custom Form and Process. The team will place a default template form and process on your campus for you to customize.

❖ Request Talent Form/Process – <https://archseattle.ccbchurch.com/goto/forms/898/responses/new>

❖ Request Treasure Form/Process - <https://archseattle.ccbchurch.com/goto/forms/1092/responses/new>



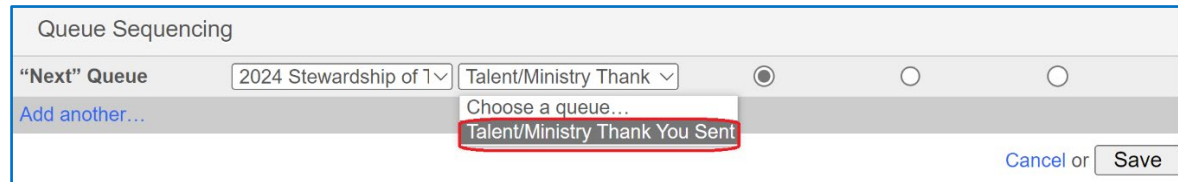
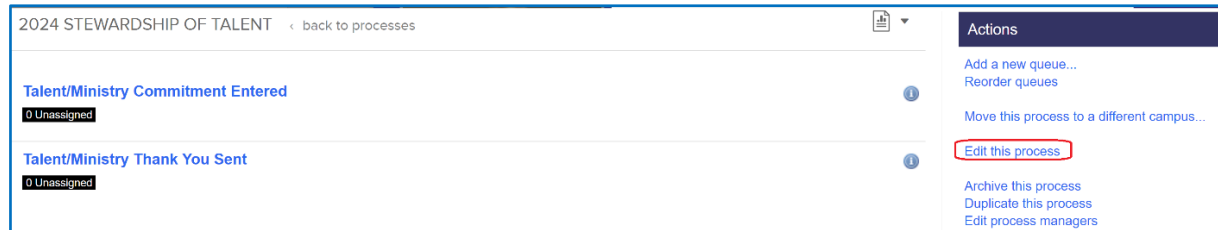
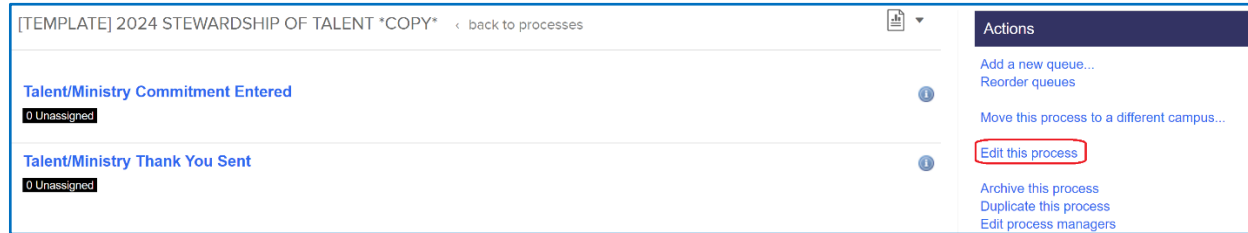
# Customizing Commitment Forms and Processes

## Step #2: Customize Process(es) (1 of 2)

Your second step is to customize the Talent Process for your parish:

### ❖ Talent Process Customizations

- Edit the Name of Process
- Setup Automation For Queue 1 to Queue 2



# Customizing Commitment Forms and Processes

## Step #2: Customize Process(es) (2 of 2)

Your second step is to customize the reasure Process for your parish:

### ❖ Treasure Process Customizations

- Edit the Name of Process
- Setup Automation For Queue 1 to Queue 2

[TEMPLATE] 2024 STEWARDSHIP OF TALENT \*COPY\* < back to processes

Process Name	Unassigned	Actions
Talent/Ministry Commitment Entered	0 Unassigned	<ul style="list-style-type: none"> <li>Add a new queue...</li> <li>Reorder queues</li> <li>Move this process to a different campus...</li> <li><b>Edit this process</b></li> <li>Archive this process</li> <li>Duplicate this process</li> <li>Edit process managers</li> </ul>
Talent/Ministry Thank You Sent	0 Unassigned	

[TEMPLATE] 2024 STEWARDSHIP OF TREASURE < back to processes

<b>Treasure Commitment Entered</b>	0 Unassigned
Treasure Thank You Sent	0 Unassigned

General Details Automation

Automation Settings

When an individual in this queue is marked as 'done', automation will take place behind the scenes to automatically place that individual into the selected Group or Event. Their Membership Type and/or Baptized status will also be set.

Type	Selection	Automated checked automatically	Optional checked by default	Optional unchecked by default	
Group	None	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	ⓘ
New Position	None	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	ⓘ
Event	None	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	ⓘ
Membership Type	None	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	ⓘ
Baptized	Don't change	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	ⓘ
Mail Merge	Choose an email...	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	ⓘ

Queue Sequencing

"Next" Queue: [Template] 2024 Stew... Treasure Thank You S...  
 Add another ... Choose a queue  
 Treasure Thank You Sent

Cancel or Save

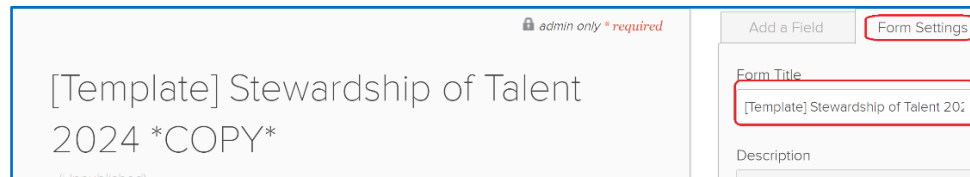
# Customizing Commitment Forms and Processes

## Step #3: Customize Form(s) (1 of 4)

Your second step is to customize the Talent/Ministry Form for your parish:

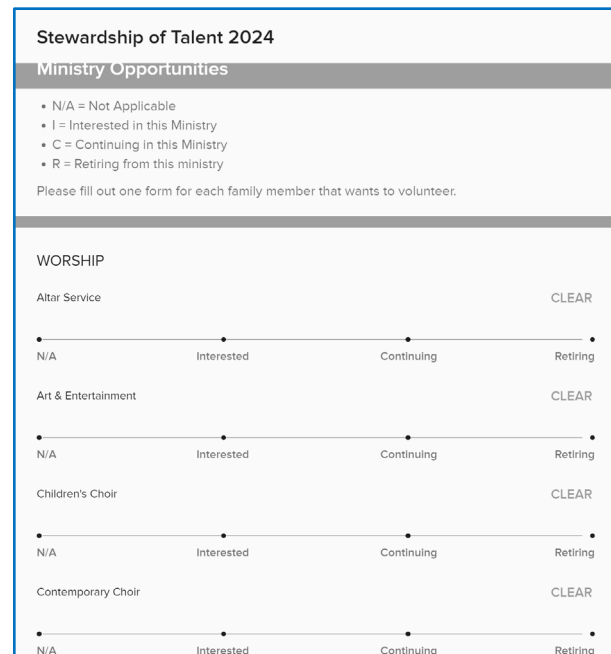
### ❖ Talent/Ministry Form Customizations

- Edit the Name of the Form



The screenshot shows the form editor interface. On the left, the form title is "[Template] Stewardship of Talent 2024 \*COPY\*". On the right, there is a "Form Settings" panel with a "Form Title" field containing "[Template] Stewardship of Talent 2024".

- Add/Remove Ministries



The screenshot shows the "Stewardship of Talent 2024" form. It includes a "Ministry Opportunities" section with a legend: N/A = Not Applicable, I = Interested in this Ministry, C = Continuing in this Ministry, and R = Retiring from this ministry. Below the legend, there are four ministry categories: WORSHIP, Art & Entertainment, Children's Choir, and Contemporary Choir. Each category has a horizontal scale with four points labeled N/A, Interested, Continuing, and Retiring, and a "CLEAR" button to the right.

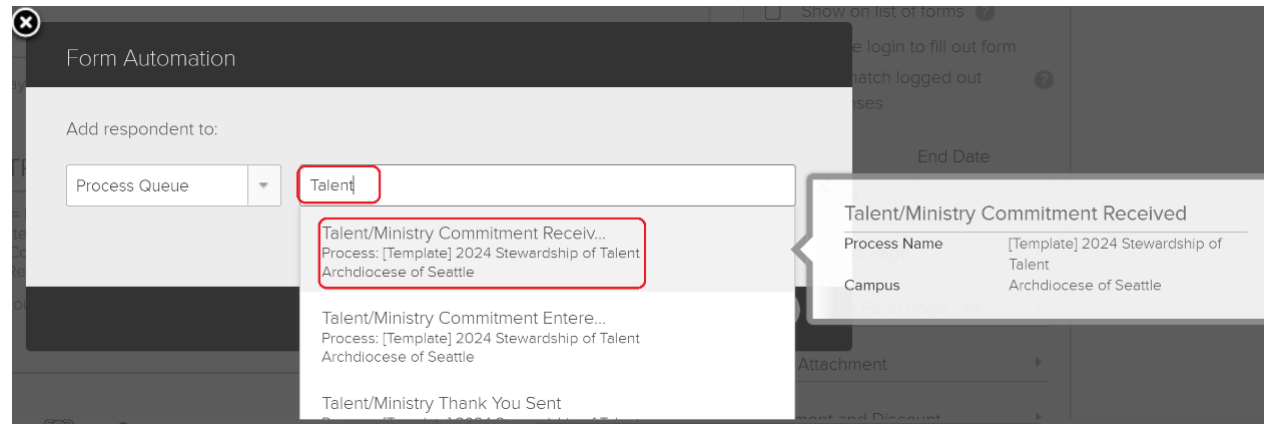
# Customizing Commitment Forms and Processes

## Step #3: Customize Form(s) (2 of 4)

Your second step is to customize the Talent/Ministry Form for your parish:

### ❖ Talent/Ministry Form Customizations (Continued)

- Setup Automation to Queue 1 of Process



- Publish Your Form

[TEMPLATE] STEWARDSHIP OF TALENT 2024 (edit) < back to forms

📄 Actions

**Unpublished**  
The form is not available to be filled out because it is not yet published.

Publish

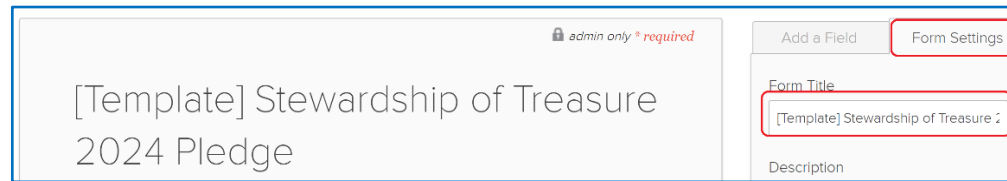
# Customizing Commitment Forms and Processes

## Step #3: Customize Form(s) (3 of 4)

Your second step is to customize the Treasure Form for your parish:

### ❖ Treasure Form Customizations

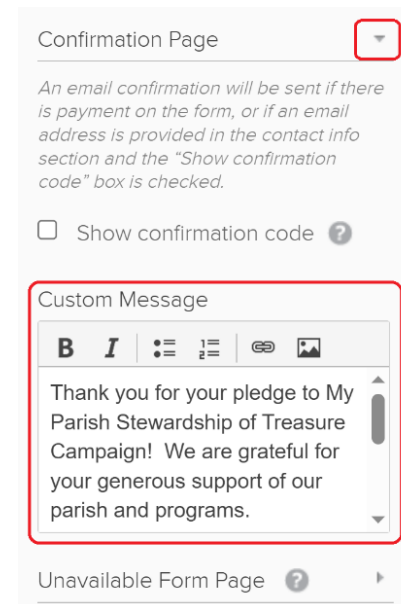
- Edit the Name of the Form



The screenshot shows a form editor interface. On the left, the form title is "[Template] Stewardship of Treasure 2024 Pledge". On the right, there is a "Form Settings" tab. Under the "Form Title" field, the text "[Template] Stewardship of Treasure 2024 Pledge" is entered and highlighted with a red box. Above the form title field, there is a "Description" field which is currently empty.

- Customize the Confirmation Text Including Redirect to Pushpay Online Giving Page

It is highly recommended that you provide a direct link to your Pushpay Online Giving page or another vendor. On the Form Settings tab, click the down arrow next to Confirmation Page and then edit the text to enter the unique URL to your giving page. For assistance with this unique URL on Pushpay Giving, please send an email to [parishstaq.support@seattlearch.org](mailto:parishstaq.support@seattlearch.org).



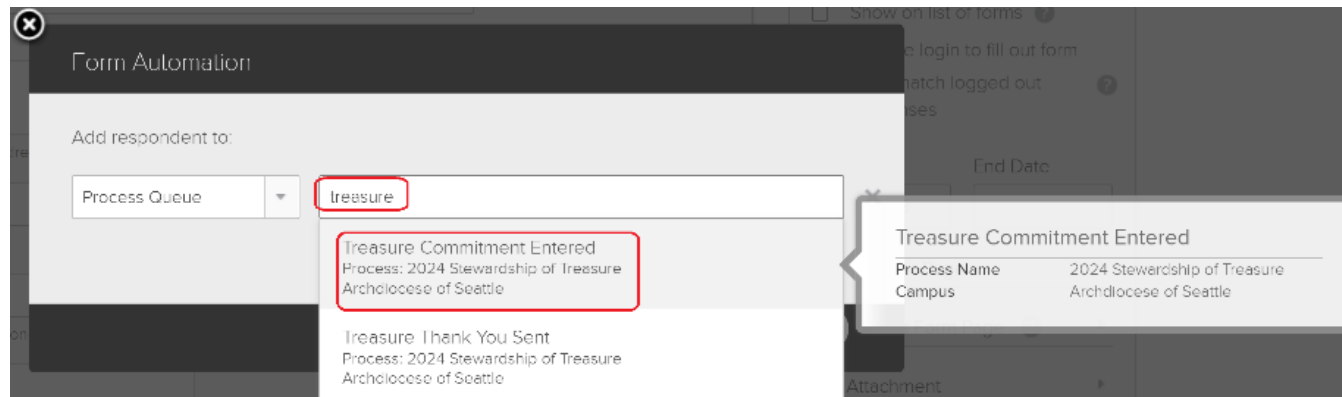
The screenshot shows the "Confirmation Page" settings in the form editor. The "Confirmation Page" dropdown menu is open, showing a list of options: "Confirmation Page", "Unavailable Form Page", and "Custom Message". The "Custom Message" option is selected and highlighted with a red box. Below the dropdown, there is a text area for the custom message. The text in the area reads: "Thank you for your pledge to My Parish Stewardship of Treasure Campaign! We are grateful for your generous support of our parish and programs." The text area has a rich text editor toolbar above it with icons for bold, italic, bulleted list, numbered list, link, and image. Below the text area, there is a "Show confirmation code" checkbox which is currently unchecked.

# Customizing Commitment Forms and Processes

## Step #3: Customize Form(s) (4 of 4)

Your second step is to customize the Treasure Form for your parish:

- ❖ **Treasure Form Customizations (Continued)**
  - Setup Automation to Queue 1 of Process



- Publish Your Form

[TRAINING] STEWARDSHIP OF TREASURE 2024 PLEDGE (edit) < back to forms

Actions



### Unpublished

The form is not available to be filled out because it is not yet published.

Publish

# Entering Talent/Ministry Commitments (1 of 3)

## ➤ Entering Skills/Abilities

- Use People Search to locate the member who has submitted a Talent/Ministry commitment.
- On the Actions drop down, select My Fit
- On the My Fit window, select Abilities and check the appropriate boxes relating to what the member entered on their Form or Commitment Card:

My Personal Fit Profile

Spiritual Gifts Passions **Abilities** Personality Style

Activity: Coaching Sports

Activity: Outdoor Sports

Activity: Sports Officiating

Arts: Calligraphy/Lettering

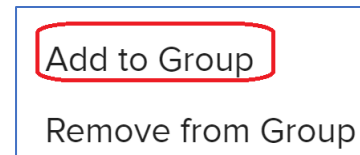
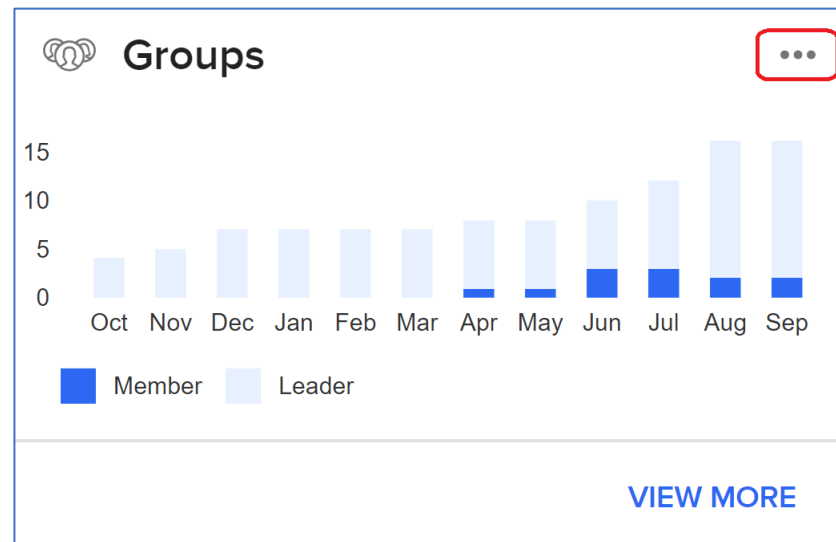
Arts: Crafts

Cancel Save

# Entering Talent/Ministry Commitments (2 of 3)

## ➤ Add Member to Ministries

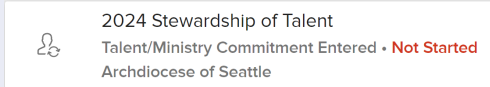
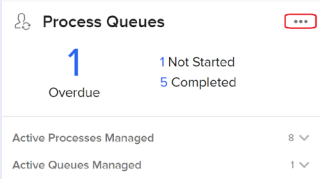
- Then, select the Involvement page for that member and add them to whichever Ministry Groups they are interested in. You can do this on the involvement page by clicking on the ‘..’ on the Groups tile and then select Add to Groups:





# Entering Talent/Ministry Commitments (3 of 3)

- **Mark Talent/Ministry Commitment Card Entered as Complete**
  - The next step with this member's commitment card is to mark them complete in the queue named Talent/Ministry Commitment Card Entered.

Commitment via ParishStaq Form	Commitment via Physical Commitment Card
<p>Since this member is already in the queue, we can mark them as complete by locating their spot in the queue from their <b>Involvement</b> tab.</p>	<p>Since this commitment came in through a physical card, the member is not in the queue yet, the first step is to add them to the queue so we can mark them as complete.</p>
<p>On the <b>Involvement</b> page, you should see a Queue in their history of engagement named <b>2024 Stewardship of Talent</b>:</p> <div data-bbox="555 908 1042 993" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;">  </div>	<p>On the <b>Involvement</b> page, click on the '...' on the Process Queues tile and select <b>Add to Process</b>:</p> <div data-bbox="1493 862 1811 1039" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;">  </div>
<p>Click on that tile and it will take you to a detailed page for this member in this queue.</p>	<p>On the <b>Add to Process</b> window, type in Talent in the search area and then select <b>2024 Stewardship of Talent Process</b>.</p>
<p>In the top right corner, click on the <b>Mark as Done</b> button.</p>	<p>Pickup at Step 2 to the left to <b>Mark them as Done</b>.</p>

# Mark Household as Having Responded

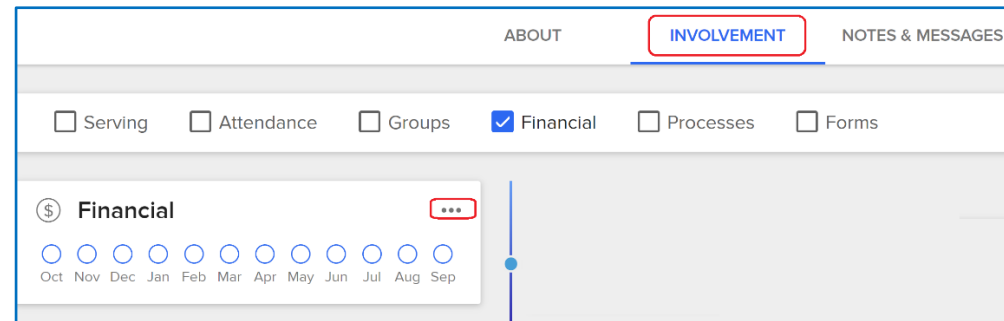
- **Add Significant Event to Primary Member of the Household for Stewardship of Talent 2024**
  - The final step for this commitment card is to enter a Significant Event on the Primary member of the household for the member that you just entered a commitment card for. This ensures that we do not send a Follow Up Letter to the household.
  - Click Edit Profile on the Primary member of the household and then on the Admin page, click Add Significant Event:

The screenshot shows the 'Edit Profile' page with the 'ADMIN' tab selected. The page contains several input fields: 'Fundraising ID', 'Diocesan ID', and 'Envelope User' (set to 'No'). At the bottom, there is a section for 'Significant Events' with a red-bordered button labeled '+ ADD SIGNIFICANT EVENT'.

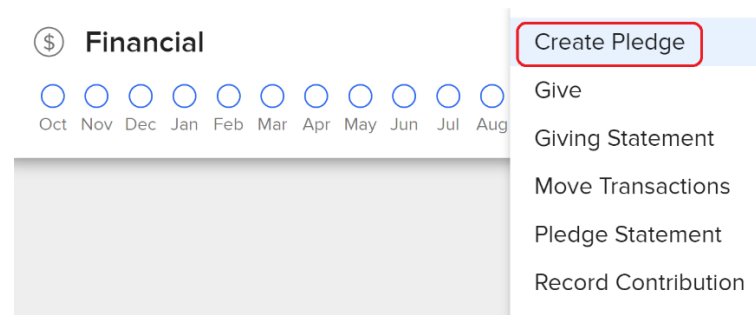
The screenshot shows a dropdown menu for 'Significant Events'. The menu is open, displaying a list of event options. The option 'Stewardship of Talent 2024' is highlighted with a red border. Other options include 'Became Godparent/Sponsor', 'College Graduation', 'High School Graduation', 'Moved Into Town', 'Moved Out of Town', 'Quinceañera', and 'Retirement'.

# Entering Treasure Pledge Commitment (1 of 3)

- **Add Pledge to Primary Member of the Household for Stewardship of Treasure**
  - Use People Search to locate the member who has submitted a Treasure commitment.
  - Click Involvement and then click on the ‘..’ on the Financial tile:



- **Select Create a Pledge:**



# Entering Treasure Pledge Commitment (2 of 3)

- **Add Pledge to Primary Member of the Household for Stewardship of Treasure (Continued)**
  - Enter pledge information for this household, using one of the following for the Fund Name:

New Pledge

Give

for

starting on

to the


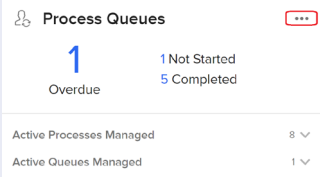
End Date

Total Amount

- Choose...
- Sacrificial Giving 2024
- Stewardship 2024
- Sunday Giving 2024
- General Fund
- Missions

# Entering Talent/Ministry Commitments (3 of 3)

- **Mark Treasure Commitment Card Entered as Complete**
  - The next step with this member's commitment card is to mark them complete in the queue named Treasure Commitment Entered.

Commitment via ParishStaq Form	Commitment via Physical Commitment Card
Since this member is already in the queue, we can mark them as complete by locating their spot in the queue from their <b>Involvement</b> tab.	Since this commitment came in through a physical card, the member is not in the queue yet, the first step is to add them to the queue so we can mark them as complete.
On the <b>Involvement</b> page, you should see a Queue in their history of engagement named <b>2024 Stewardship of Treasure</b> :	On the <b>Involvement</b> page, click on the '...' on the Process Queues tile and select <b>Add to Process</b> :
	
Click on that tile and it will take you to a detailed page for this member in this queue.	On the <b>Add to Process</b> window, type in Talent in the search area and then select <b>2024 Stewardship of Treasure Process</b> .
In the top right corner, click on the <b>Mark as Done</b> button.	Pickup at Step 2 to the left to <b>Mark them as Done</b> .

# Mark Household as Having Responded

- **Add Significant Event to Primary Member of the Household for Stewardship of Treasure 2024**
  - The final step for this commitment card is to enter a Significant Event on the Primary member of the household for the member that you just entered a commitment card for. This ensures that we do not send a Follow Up Letter to the household.
  - Click Edit Profile on the Primary member of the household and then on the Admin page, click Add Significant Event:

The screenshot shows the 'Edit Profile' page with the 'ADMIN' tab selected. The 'Significant Events' section is visible at the bottom, and a red box highlights the '+ ADD SIGNIFICANT EVENT' button.

The screenshot shows the 'Significant Event' dropdown menu with the following options: Select an Event..., Became Godparent/Sponsor, College Graduation, High School Graduation, Moved Into Town, Moved Out of Town, Quinceañera, Retirement, and Stewardship of Treasure 2024. The 'Stewardship of Treasure 2024' option is highlighted with a red box.

# The Remainder of the Campaign

## Steps for Producing the Follow Up Letters

- ❖ Export list of Registered Parishioners who have not pledged yet
- ❖ Prepare for Mail Merge
- ❖ Merge Letters to the Printer or a New Document
- ❖ Mark Members as Having Received Thank You Letter

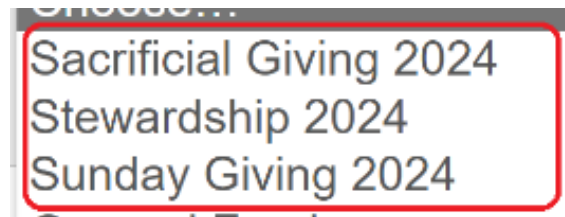
## Steps for Producing the Thank You Letter

- ❖ Export list of Registered Parishioners who have pledged
- ❖ Prepare for Mail Merge
- ❖ Merge Letters to the Printer or a New Document
- ❖ Mark Members as Having Received Thank You Letter

# Online Giving Fund Name Matching

## Key Points for Mapping Gifts to Pledges:

- ❖ It is essential that your Fund Name in Pushpay Online Giving or other vendor is named to match the Pledge Fund you selected in ParishStaq.
- ❖ Best practice for this upcoming year, is to have a Fund created in the Giving Portal, that includes one of the following and has your Parish ID:



- ❖ So, for example, if the Parish ID were 275 and the Fund Name is Stewardship 2024, the Fund Name would be setup in Pushpay Giving Portal as:

**Stewardship 2024 - 275**



TAKE A STEP IN YOUR PLEDGE  
PARISH STEWARDSHIP  
TIME. TALENT. TREASURE.

# Question and Answer

Q & A

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## Assistance From Our Team

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