Annual Giving letters using the 'ADMIN:Annual Giving Report'



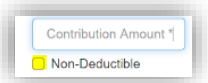
Description - Family Giving report for a selected calendar year. Select Family Statuses, Buckets/ Funds, will provide a list of the families with giving levels within the Lo and Hi limits.

Parameters:

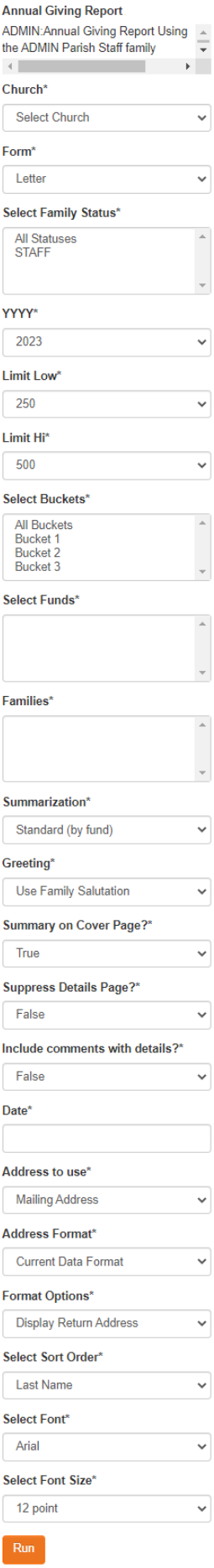
- Church
- Form (multiple forms can be defined)
- Family Statuses
- Calendar Year (Current and 4 prior available)
- Limit Low (Family picklist lower giving level)
- Limit Hi (Family picklist upper giving level)
- Fund Buckets (suggest 'All' given proper configuration)
- Funds (Suggest 'All' given proper configuration)
- Select Families
- Summarization
- Greeting
- Summary on Cover Page?
- Suppress Details Page?
- Include comments with details?
- Date
- Address to use
- Address format
- Format Options
- Select Sort Order
- Select Font
- Select Font Size

Purpose – Prepares the year-end tax reporting document for a family.

Directions: If you use the Funds to log any fees which do not qualify as deductible, or contributions from pre-tax sources like IRA's or stock, these funds need to be identified as 'non-deductible' in Gabriel. (other items non-deductible include registration fees, room rental fees, class fees, wedding fees) Gabriel can identify, at the time of entry, if an item is non-deductible. Your parish may have a separate fund for these items. This report will use either the 'non-deductible' checkbox, or the designation of a fund as a 'Bucket-2' fund, to segregate these items in the letters. Also, you may take this opportunity to designate a bucket for all your funds. This report and future reports will use this designation to distinguish 'Parish', 'Non-Deductible' or 'Diocese'.



- Bucket 1 - Parish funds
- Bucket 2 - Non-deductible
- Bucket 3 – Fees (RE, books, rental)



Note: The non-deductible indicator can be used for any of the single contribution entries. In addition, if you have a 'Contributions' and a 'Contributions Non-Deductible', and you would like to simplify your funds list and use the non-deductible indicator, the historical data can be merged with the non-deductible fund historical data indicator set to TRUE.

For assistance with configuring funds with this report, contact Bill Maly 513.263.3354.

The letter is intended to provide documentation for families itemizing deductions when filing their income tax. Many parishes use this as an opportunity to show gratitude and reach out to their families. Some also use this as an opportunity to share parish financial and ask for increases.

The parameters for the report allow you to select a subset of families. After selecting the calendar year, you can select the annual giving dollar range for the families retrieved in the report. The default is 250 and 500. (The defaults can be set by LETTER FORMAT using the PRM note entries. **See Below**) Providing low and high limits enable you to prepare different letters for different giving levels. FOR A ZERO GIVER LETTER, enter 0 in both Low and Hi parameter. (Zero entries will suppress the fund table) Suggested that you use an additional Merge Form layout for the content of Zero Giver letter.

Once you select the funds, there will be a 'pause' while the system retrieves a list of families matching the criteria entered to this point. You can select all families in the group, a single family, or select families, by holding down the 'cntl' key and clicking on multiple family names.

Each family letter included a summary of giving by fund. Non-deductible contributions are reported in a separate column. You can suppress the summary on the cover page by setting the 'Summary on Cover Page?' to 'False'. The column will display only when non-deductible contributions were made by the family. A second page, which includes details transactions by date is also prepared and can be suppressed by setting the 'Suppress Details Page?' parameter to 'True'.

The default for the summary on the first page is by fund. Configuration of Fund Attributes can provide a custom summarization. **See Below**

The greeting, 'Dear' NAME uses the Salutation by default. Choosing Family First Name, can provide a more casual greeting.

The comments entered on transactions can be displayed if you set the 'Include comments with details?' parameter to 'True'.

The date field can be changed from the default of 'today's date' if you're are back or forward dating the letters.

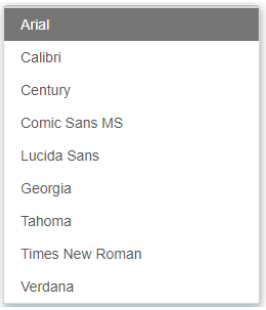
Each family can have a Street Address found on the main family page as well as a mailing address and an alternate address. The default 'Address to use' is set to Mailing Address, which considers date specific alternates and mailing addresses. You can switch this to Street Address if desired.

The ‘Address Format’ will give the choice for the address to Mixed Case, Upper Case (as desired by USPS) and left to the format found in your data (the default).

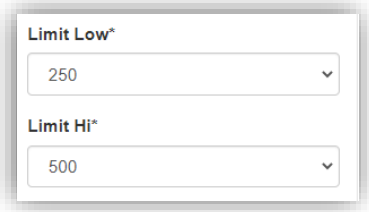
By default, your return address is printed. You can suppress this with the ‘Format Options’ parameter- ‘Suppress Return Address’.

Sort Order can be family Last Name or Zip Code/Last Name.

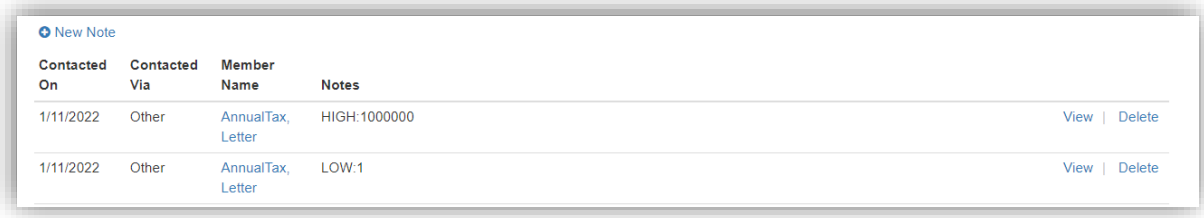
The default font is Arial, 12pt. You can choose any of the following fonts with size 12 point or 10 point:



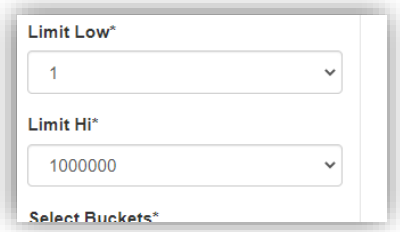
SETTING ALTERNATE DEFAULT LOW AND HIGH THRESHOLDS THIS REPORT USES THE PRM NOTE FEATURE: The default is set to retrieve families giving between 250 and 500 for the selected buckets and funds. As you are doing test runs of your letter and setting up the format, this narrow group will speed the retrieval of your families and the report run. Once you have a set format, you can then set your own low and high limits.



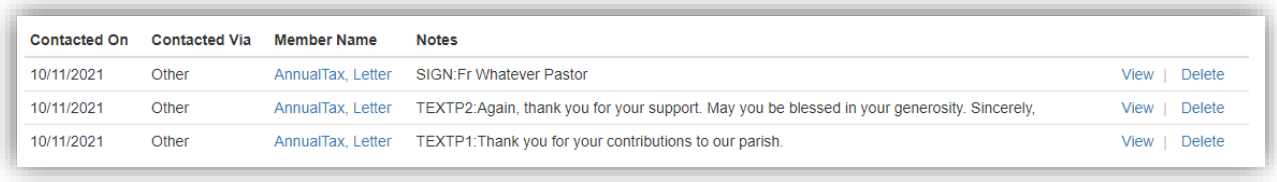
You can change the defaults for your specific form by adding a PRM note as follows:



Next time you access the report, the default values will change. You can still select alternate values.



THIS REPORT USES THE PRM NOTE MERGE FEATURE. Every parish has been loaded with a Parish Staff family named ADMIN. In this family you will find a member named AnnualTax, Letter. The text for the letter is defined in PRM notes. The text for the letter is defined in PRM notes. A parish can add multiple letter formats by adding a new member in the ADMIN family. The member's last name should be changed to 'AnnualTax' with the first name being a description of the letter. This new 'letter' will appear in the 'Form' drop down parameter.



Contacted On	Contacted Via	Member Name	Notes	
10/11/2021	Other	AnnualTax, Letter	SIGN:Fr Whatever Pastor	View | Delete
10/11/2021	Other	AnnualTax, Letter	TEXTP2:Again, thank you for your support. May you be blessed in your generosity. Sincerely,	View | Delete
10/11/2021	Other	AnnualTax, Letter	TEXTP1:Thank you for your contributions to our parish.	View | Delete

Using these PRM notes, you can define multiple letters, each containing the text for your parish needs.

- A PRM note type of 'Other' with the first characters being 'TEXTP1:' is the content of the letter before the table showing giving summarized by fund.
- A PRM note type of 'Other' with the first characters being 'TEXTP2:' is the content of the letter before the table showing giving summarized by fund.
  NOTES: For TextP1 and TextP2 data
  For italic font use a ~(tilde) +'I' before and an !(exclamation point) +'I' at end. ~Isample!I
  For bold font use a ~(tilde) +'B' before and an !(exclamation point) +'B' at end. ~Bsample!B
  For underline font use a ~(tilde) +'U' before and an !(exclamation point) +'U' at end. ~Usample!U
  To 'horizontally center' the text use a ~(tilde) +'C' before and an !(exclamation point) +'U' at end. ~Csample!C
  Optionally, a /(forward slash) can be used as a carriage return. or simply use a carriage return in the note field.
- A PRM note type of 'Other' with the first characters being 'SIGN:' is the content of the person signing the letter.
- A PRM note type of 'Other' with the first characters being 'SIGNURL:' is the location of a png or jpg of the signer's signature. (can be stored at https//finance.catholicaoc.org.)

Logo and return addresses: Family Level PRM notes can be used to define how your logo displays. This is an optional feature. You can also define these notes at the Member PRM level if you use a different logo for each letter type. Defining a member level PRM LogoURL and LogoOrientation will override the Family PRM definitions for LogoURL and LogoOrientation.

- A PRM note type of 'Other' with the first characters being 'LogoURL:' is the location of a png or jpg of the parish logo. (can be stored at https//finance.catholicaoc.org.) (can be stored at https//finance.catholicaoc.org.)
- A PRM note type of 'Other' with the first characters being 'LogoOrientation:' provides the report information about the physical dimensions of the logo file: Entering 'WIDE' will place the logo on the top of the page and the return address on the right. Entering 'Square' will place the logo on the top right of the page with the return address above the recipient's address.

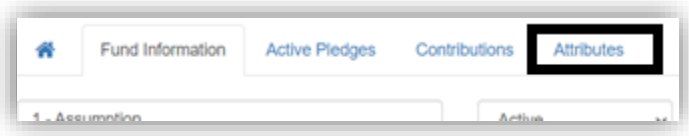
Contacted On	Contacted Via	Member Name	Notes
10/12/2021	Other	(Family Note)	LogoOrientation:WIDE
10/12/2021	Other	(Family Note)	LogoURL:http:[redacted] png

SUMMARIZATION OPTIONS: The default summary of contributions provided is by fund. Utilizing the Fund Attributes in the fund configuration, custom summary levels, or groups, can be defined, as well as the sort order.

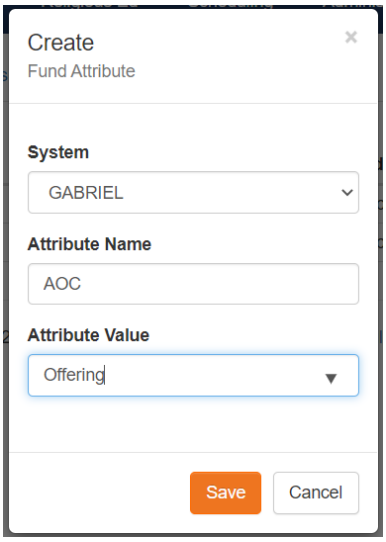
All funds fall into one of the following groups which provide the specificity for standard Archdiocese reporting and basis for best practice general ledger entry. These are the valid AOC attribute values:

Archdiocese of the Military
Ash Wednesday
Building and Grounds
Campaign for Human Development
Catholic Relief Services
Christmas Donation
Easter Donation
Flower Donation
Fundraiser
Good Friday
Holy Days
Holy Father's Collection
Mass Stipend
Memorial Donation
Offering
Other Designated
Parish School Religion
Respect Life
Retirement for Religious
Solemnity of Mary
St. Vincent de Paul
World Mission Sunday

Using Gabriel Fund Maintenance, attributes can be added to each fund to reflect their AOC grouping. First step is to configure AOC attribute for each fund. Access the fund, click Attributes, and then Add Attribute.







System: select GABRIEL
Attribute Name: enter 'AOC'
Attribute Value: enter relative AOC attribute from the above.

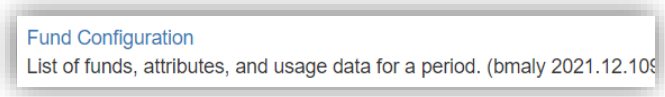
Repeat this for each Fund.

Parish Alternative Grouping. Only enter when the grouping you desire is not an AOC label you wish. It does not need to be added to every fund, as the Parish will override the AOC entry. And you can define a grouping different from the AOC.

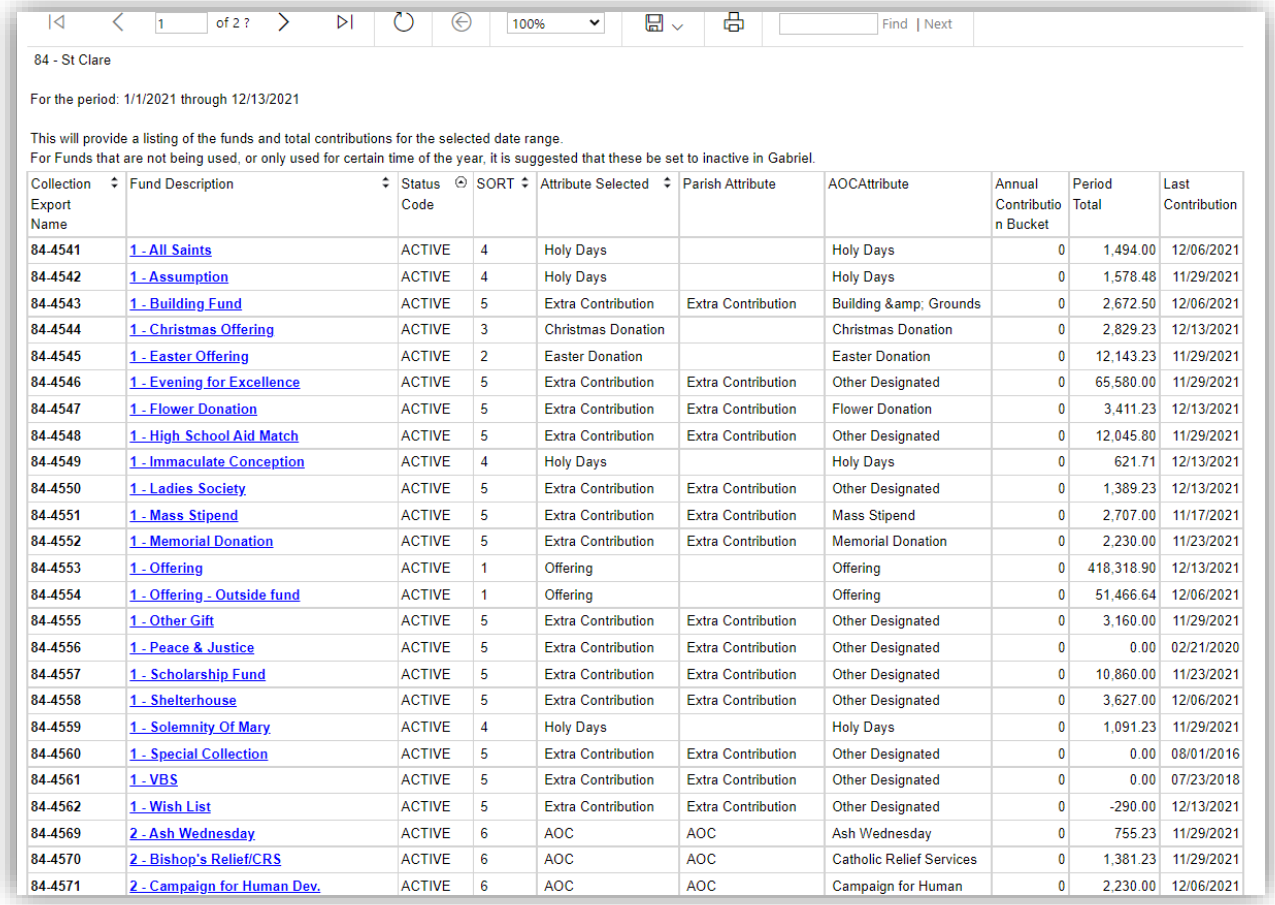
System: select GABRIEL
Attribute Name: enter 'Parish'
Attribute Value: enter relative AOC attribute from the above.

Custom sorting. By default, the sorting of the funds/fund group. Setting an alternative sorting can be done by entering yet another attribute. This attribute name is 'SORT'. The value is set numerically. Assign all of your 'like' parish/aoc attributes with the same SORT value. Note that multiple funds will then have the same values.

You can view your attribute settings using the Fund Configuration report in the library (AOC favorites).



This is a sample of a custom Parish grouping including a SORT option.



84 - St Clare

For the period: 1/1/2021 through 12/13/2021

This will provide a listing of the funds and total contributions for the selected date range.
For Funds that are not being used, or only used for certain time of the year, it is suggested that these be set to inactive in Gabriel.

Collection Export Name	Fund Description	Status Code	SORT	Attribute Selected	Parish Attribute	AOCAttribute	Annual Contribution Bucket	Period Total	Last Contribution
84-4541	1 - All Saints	ACTIVE	4	Holy Days		Holy Days	0	1,494.00	12/06/2021
84-4542	1 - Assumption	ACTIVE	4	Holy Days		Holy Days	0	1,578.48	11/29/2021
84-4543	1 - Building Fund	ACTIVE	5	Extra Contribution	Extra Contribution	Building & Grounds	0	2,672.50	12/06/2021
84-4544	1 - Christmas Offering	ACTIVE	3	Christmas Donation		Christmas Donation	0	2,829.23	12/13/2021
84-4545	1 - Easter Offering	ACTIVE	2	Easter Donation		Easter Donation	0	12,143.23	11/29/2021
84-4546	1 - Evening for Excellence	ACTIVE	5	Extra Contribution	Extra Contribution	Other Designated	0	65,580.00	11/29/2021
84-4547	1 - Flower Donation	ACTIVE	5	Extra Contribution	Extra Contribution	Flower Donation	0	3,411.23	12/13/2021
84-4548	1 - High School Aid Match	ACTIVE	5	Extra Contribution	Extra Contribution	Other Designated	0	12,045.80	11/29/2021
84-4549	1 - Immaculate Conception	ACTIVE	4	Holy Days		Holy Days	0	621.71	12/13/2021
84-4550	1 - Ladies Society	ACTIVE	5	Extra Contribution	Extra Contribution	Other Designated	0	1,389.23	12/13/2021
84-4551	1 - Mass Stipend	ACTIVE	5	Extra Contribution	Extra Contribution	Mass Stipend	0	2,707.00	11/17/2021
84-4552	1 - Memorial Donation	ACTIVE	5	Extra Contribution	Extra Contribution	Memorial Donation	0	2,230.00	11/23/2021
84-4553	1 - Offering	ACTIVE	1	Offering		Offering	0	418,318.90	12/13/2021
84-4554	1 - Offering - Outside fund	ACTIVE	1	Offering		Offering	0	51,466.64	12/06/2021
84-4555	1 - Other Gift	ACTIVE	5	Extra Contribution	Extra Contribution	Other Designated	0	3,160.00	11/29/2021
84-4556	1 - Peace & Justice	ACTIVE	5	Extra Contribution	Extra Contribution	Other Designated	0	0.00	02/21/2020
84-4557	1 - Scholarship Fund	ACTIVE	5	Extra Contribution	Extra Contribution	Other Designated	0	10,860.00	11/23/2021
84-4558	1 - Shelterhouse	ACTIVE	5	Extra Contribution	Extra Contribution	Other Designated	0	3,627.00	12/06/2021
84-4559	1 - Solemnity Of Mary	ACTIVE	4	Holy Days		Holy Days	0	1,091.23	11/29/2021
84-4560	1 - Special Collection	ACTIVE	5	Extra Contribution	Extra Contribution	Other Designated	0	0.00	08/01/2016
84-4561	1 - VBS	ACTIVE	5	Extra Contribution	Extra Contribution	Other Designated	0	0.00	07/23/2018
84-4562	1 - Wish List	ACTIVE	5	Extra Contribution	Extra Contribution	Other Designated	0	-290.00	12/13/2021
84-4569	2 - Ash Wednesday	ACTIVE	6	AOC	AOC	Ash Wednesday	0	755.23	11/29/2021
84-4570	2 - Bishop's Relief/CRS	ACTIVE	6	AOC	AOC	Catholic Relief Services	0	1,381.23	11/29/2021
84-4571	2 - Campaign for Human Dev.	ACTIVE	6	AOC	AOC	Campaign for Human	0	2,230.00	12/06/2021

St. Ignatius of Loyola Church

5222 North Bend Road, Cincinnati, Ohio 45247 • (513) 661-6565

LogoURL

10/20/2021 ⇐ Date parameter

[illegible]
[illegible]
Cincinnati, OH 45239

St Ignatius Parish
5222 North Bend Rd
Cincinnati, OH 45247

Dear [illegible],

TextP1

Thank you for your contributions to our parish. Your generosity over the past year has made it possible to continue our good works.

Our records show that you have contributed the following over the giving period: **January 1, 2020 to December 31, 2020**.

Fund	Amount
1 - Contributions	265.00
Total Envelope Number [illegible]	**$265.00**

Again, thank you for your support. May you be blessed in your generosity.

Sincerely,

⇐ SignURL (optional)

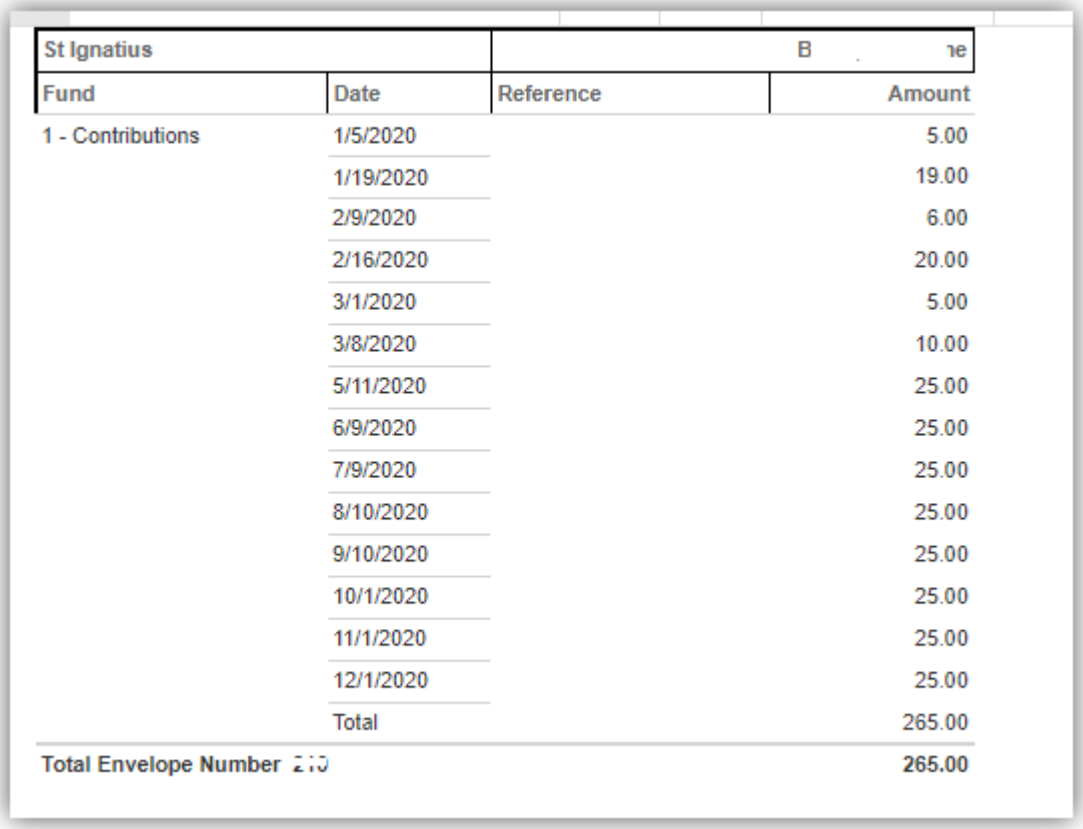
TextP2

Fr. Fernandes
Pastor

⇐ Sign

St Ignatius Parish has not provided, in whole or in part, any goods or services to the above named donor in exchange for this gift. This statement is provided by St Ignatius Parish in order to comply with the Internal Revenue Code. Retain this with your tax records.

Details Page (can be suppresses with parameter)



St Ignatius			B ne
Fund	Date	Reference	Amount
1 - Contributions	1/5/2020		5.00
	1/19/2020		19.00
	2/9/2020		6.00
	2/16/2020		20.00
	3/1/2020		5.00
	3/8/2020		10.00
	5/11/2020		25.00
	6/9/2020		25.00
	7/9/2020		25.00
	8/10/2020		25.00
	9/10/2020		25.00
	10/1/2020		25.00
	11/1/2020		25.00
	12/1/2020		25.00
	Total		265.00
Total Envelope Number 2			**265.00**