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Advent 2012 Newsletter

Out of the Office - Wednesday, Dec. 19th thru Friday, Dec. 21st

I will be out of the office Wednesday, December 19th thru Friday, December 21st. I will be available via cell phone and e-mail throughout that time. I'm traveling down to watch my son play for Seattle Prep in the Mission Prep Christmas Classic in San Luis Obispo. Just a Freshman, but he's doing well so far :).

Stewardship 2013 - Helpful Report [List of Lost Pledgers]

As you finish up your 2013 Stewardship campaigns, I want you to be aware of a great report within PDS Church Office. The *List of Lost Pledgers* report is a great tool to allow you to follow-up on parishioners that have pledged in the prior year, but not yet responded to your current campaign.

It's available from Families | Reports | Stewardship | Financial - Treasure | Evaluation | List of Lost Pledgers

Report Preview

Parish Data System
List of Lost Pledgers for Fund: 4 (01/01/2009 - 12/31/2010)

Total Number of Families: 112
 Families in Previous Period: 81 Previous Period: 01/01/2009 - 12/31/2009
 Families in Current Period: 87 Current Period: 01/01/2010 - 12/31/2010

Amounts Pledged										
Category	Previous Pledges	Current Pledges	New Pledges	Lost Pledges	Pledges Increased	Pledges Decreased	Remained the Same	Prev. Amt. Pledged	Curr. Amt. Pledged	Total Gain/Loss
\$0.00 - \$25.00	0	0	0	0	0	0	0	0.00	0.00	0.00
\$25.01 - \$50.00	0	0	0	0	0	0	0	0.00	0.00	0.00
\$50.01 - \$75.00	0	0	0	0	0	0	0	0.00	0.00	0.00
\$75.01 - \$100.00	2	0	0	2	0	0	0	200.00	0.00	-200.00
\$100.01 - \$150.00	2	2	0	0	0	0	2	236.67	236.67	0.00
\$150.01 - \$200.00	0	0	0	0	0	0	0	0.00	0.00	0.00
\$200.01 - \$300.00	7	5	0	3	0	0	4	1,949.92	1,426.67	-523.25
\$300.01 - \$400.00	3	1	0	2	0	0	1	1,160.00	400.00	-760.00
\$400.01 - \$500.00	2	1	0	1	0	0	1	909.96	500.00	-409.96
\$500.01 - \$750.00	15	15	0	0	0	0	15	9,170.00	9,170.00	0.00
\$750.01 - \$1,000.00	4	3	0	0	0	1	3	3,700.00	2,900.00	-800.00
\$1,000.01 - \$1,500.00	17	16	0	1	1	1	14	19,540.00	18,340.00	-1,200.00
\$1,500.01 - \$2,000.00	6	5	0	1	0	0	5	11,499.00	9,600.00	-1,899.00
\$2,000.01 - \$2,500.00	5	5	0	0	0	0	5	12,000.00	12,000.00	0.00
\$2,500.01 - \$3,000.00	2	2	0	0	0	0	2	5,800.00	5,800.00	0.00
\$3,000.01 - \$3,500.00	0	0	0	0	0	0	0	0.00	0.00	0.00
\$3,500.01 - \$4,000.00	1	1	0	0	0	0	1	4,000.00	4,000.00	0.00
\$4,000.01 - \$4,500.00	1	1	0	0	0	0	1	4,140.13	4,140.13	0.00
\$4,500.01 - \$5,000.00	2	2	0	0	0	0	2	19,000.00	19,000.00	0.00
\$5,000.01 - \$7,500.00	0	0	0	0	0	0	0	0.00	0.00	0.00
\$7,500.01 - \$10,000.00	1	1	0	0	0	0	1	8,000.00	8,000.00	0.00
\$10,000.01 - \$15,000.00	0	0	0	0	0	0	0	0.00	0.00	0.00
\$15,000.01 - \$10,000,000.00	0	1	1	0	0	0	0	0.00	20,000.00	20,000.00
Total	70	81	1	10	1	2	57	\$92,006.68	\$196,313.46	\$14,306.79

Pledge Last Year	ID#	Family Name
\$100.00	41	Abbott, Harold, Mr.
\$100.00	892	Montaigne, Thomas, Mr.
\$209.92	400	Avillon, Laura (Garrison), Lisa, Mrs. I, Ms.
\$290.00	23	Babbitt, Joseph (Agnes), MM
\$300.00	689	Velach, Anthony (Bertrn, Betty, Mrs.), Mr., II
\$360.00	2871	Harcourt, Elizabeth, Mrs.
\$400.00	3841	Schmit, Jeffrey (Lenore), MM
\$409.96	235	Jacobson, Phyllis, Mrs.
\$1,200.00	258	Strickland, Arthur (Shirley), MM
\$1,800.00	559	O'Brien, Clare, Mrs.

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As you can see from the sample above, the report produces some helpful information in the top table and then a list of those families that have pledged in the year prior, but have not yet responded for 2013. During the report process, you can also choose to attach a FAMILY KEYWORD to those families that will allow you to create follow-up communications directly with this group.

Engaged Church & Strengthsfinders

In the past year or so, I have had a number of parishes ask questions about how to track the Strengths information from the Clifton Strengthfinders process and I'm beginning to get more questions on the Engaged Church process.

I can assist your parish with a couple of different options for setting up tracking for the Strength inventory information on a member by member basis. In addition to creating the data fields to store the information, I can also assist with a number of different report processes that will work well with this new category of data. Please contact me for more information.

I'm also interested in how parishes are working with the Engaged Church surveys and communication with parishioners. If you have some feedback on how your parish has worked with this, please let me know so that we might share this information with other parishes.

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End of Year Tax Letters - Helpful Hints



The End of Year Donor Substantiation Letter can be found at:

- Contributions | Reports | Tax Reports | End of the Year Donor Substantiation

This report will generate a one or two page statement for all donors in your system. Everyone will receive the first page that lists a summary of donations for the year. If a family has given over \$250 on any given day, they will receive a second page, with detailed specifics on those gifts over the \$250 limit. This second page is required by the IRS and has the *tax language* about '...goods and services....'.

If you'd like all of your families to have that statement on their first page, you will want to add that phrase to the BODY OF THE LETTER within PDS.

The settings for the \$250 or above and whether donations on the same day should be combined can be found by going to the setup section - Setup/Admin | Setup Options | Batch Number and Tax Limit Information:

Check for Current Versions

PDS updates their programs periodically and it is always a good idea to be sure that you're using the most current update for your version number. The following is a list of the most recent update builds for all of their products:



Church, Formation and School Office Management - 6.4D
 Facility Scheduler - 6.0G
 Ledger & Ledger/Payroll - 6.2G
 Ministry Scheduler - 6.5D

To download the most recent update, within each program, go to [ONLINE RESOURCES](#) | [CHECK FOR PROGRAM UPDATES](#) and the program will search the PDS website for any updates automatically for that particular program.

If you are still on version 4 or 5 of any of the above, please contact me for update pricing.

One on One Remote Training - 50% off during the month of December!

I've been asked recently for updates on upcoming trainings. I'm finding myself doing a number of one of one sessions with staff members via remote web training. These are tremendously useful as we can focus on as little or as much as you need.

During the month of December, I'm offering 50% off remote session trainings for one or more staff members. I'm happy to do this for 30 minutes up to several hours, depending upon your specific training needs.

Please contact me at bryan@ptechs.com for more details.

Have a Blessed Advent Season, Bryan

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Save

50%

Save 50% off of your online training sessions. From 30 minutes to hourly sessions for one or more staff members. Perfect way to resolve those 'how do I do that one report I've been wanting to do' situations.

Offer Expires: December 31, 2012

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