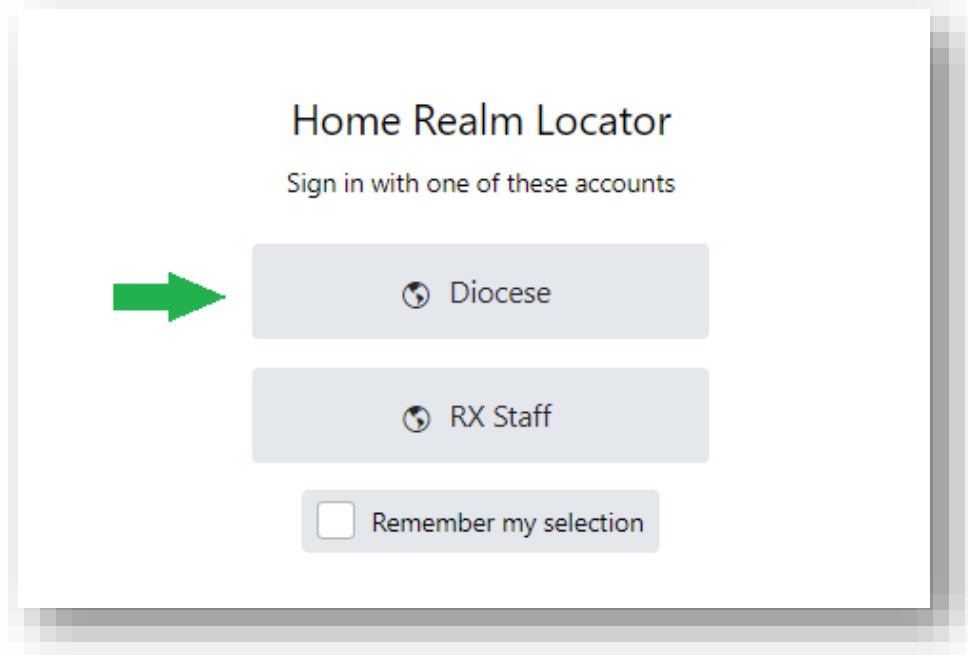
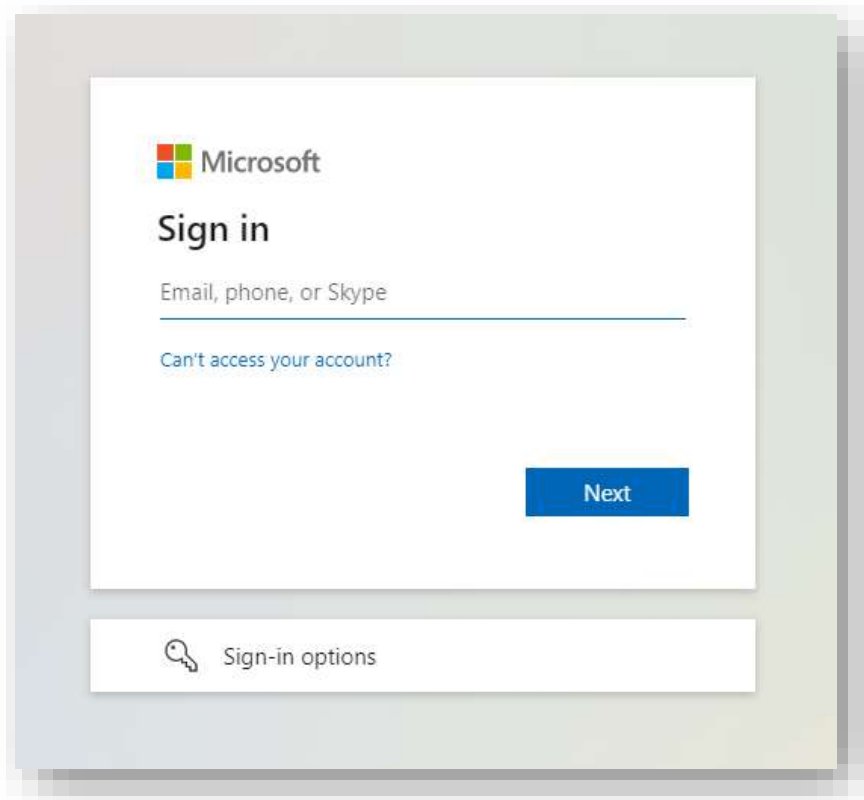


Diocese of Charleston/Reporting Xpress Guide for Accessing Your Parish's Progress Reports

- **Step 1:** Visit <https://charlestdiocese.foundationreports.org/>
- **Step 2:** Click on the “Diocese” button



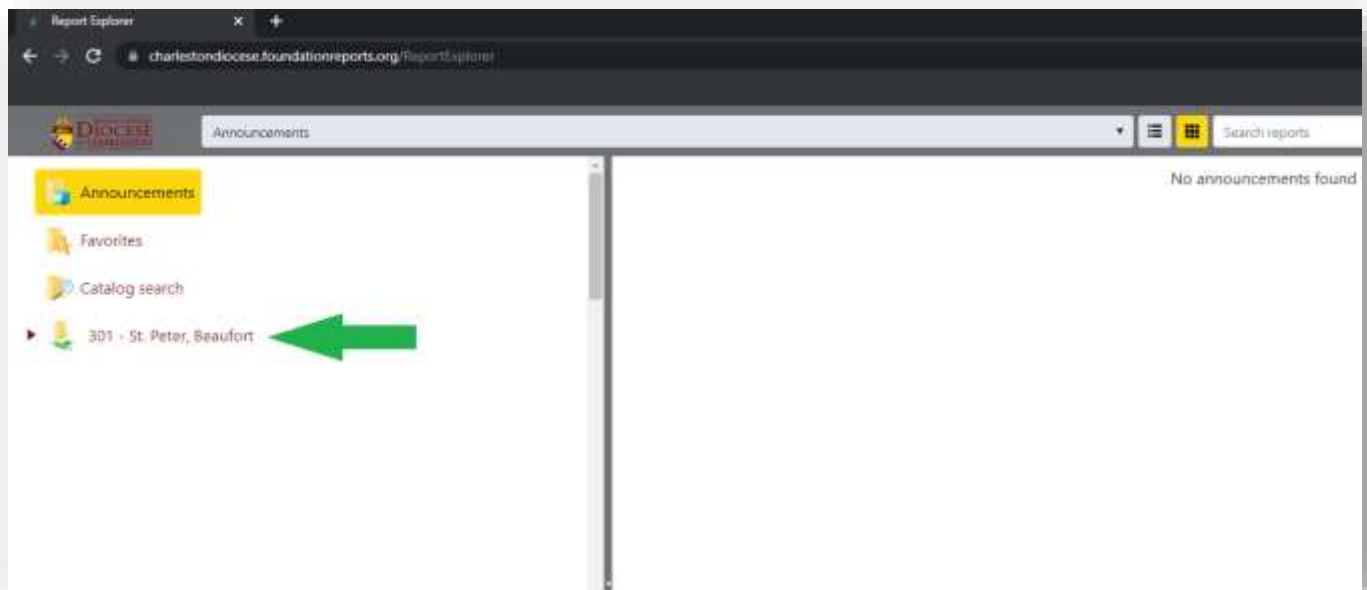
- **Step 3:** Using your @charlestdiocese.org account information, log into Microsoft



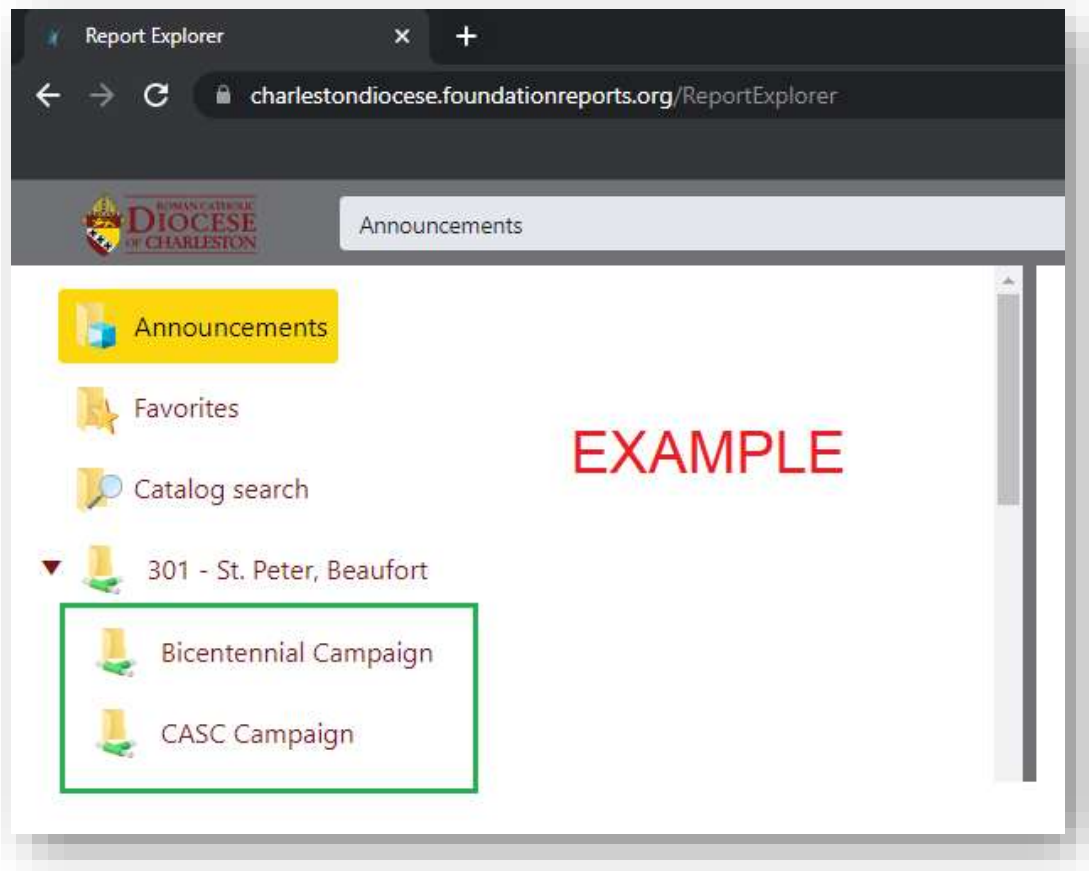
- **Step 4:** You may need to verify your identity after logging into Microsoft, such as by entering a code that is sent via text or e-mail to a personal account of yours. Once your identity is confirmed, you will have access to the online portal



- **Step 5:** On the portal, find your parish's folder on the left-hand side of the screen



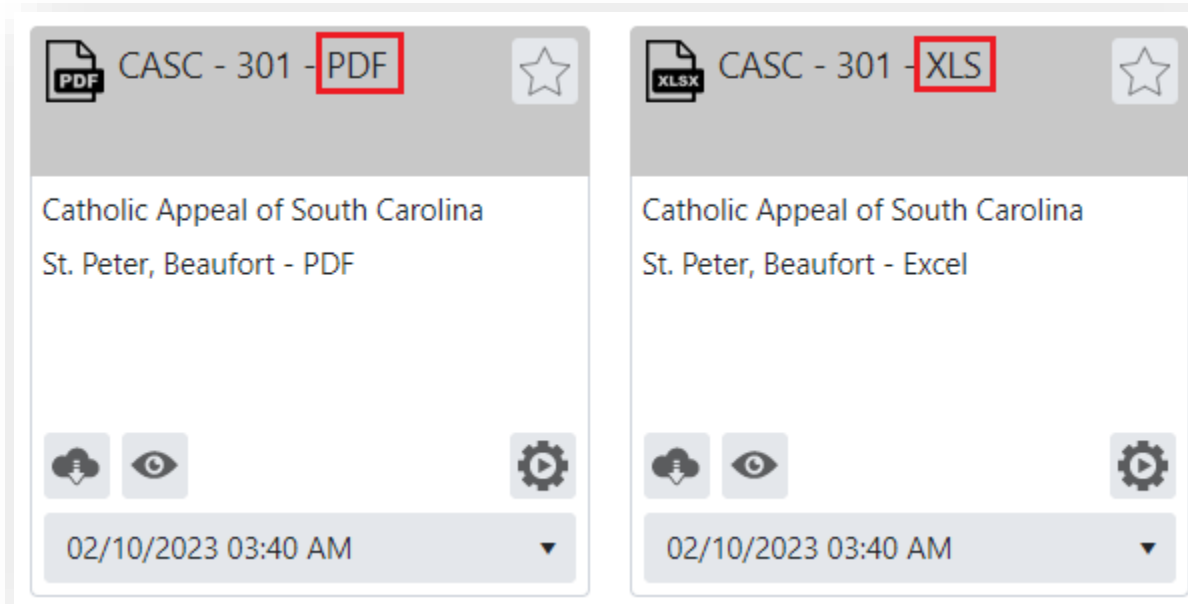
- **Step 6:** Click on your parish's folder, and you will see two items drop down: "Bicentennial Campaign" and "CASC (Catholic Appeal of SC) Campaign"



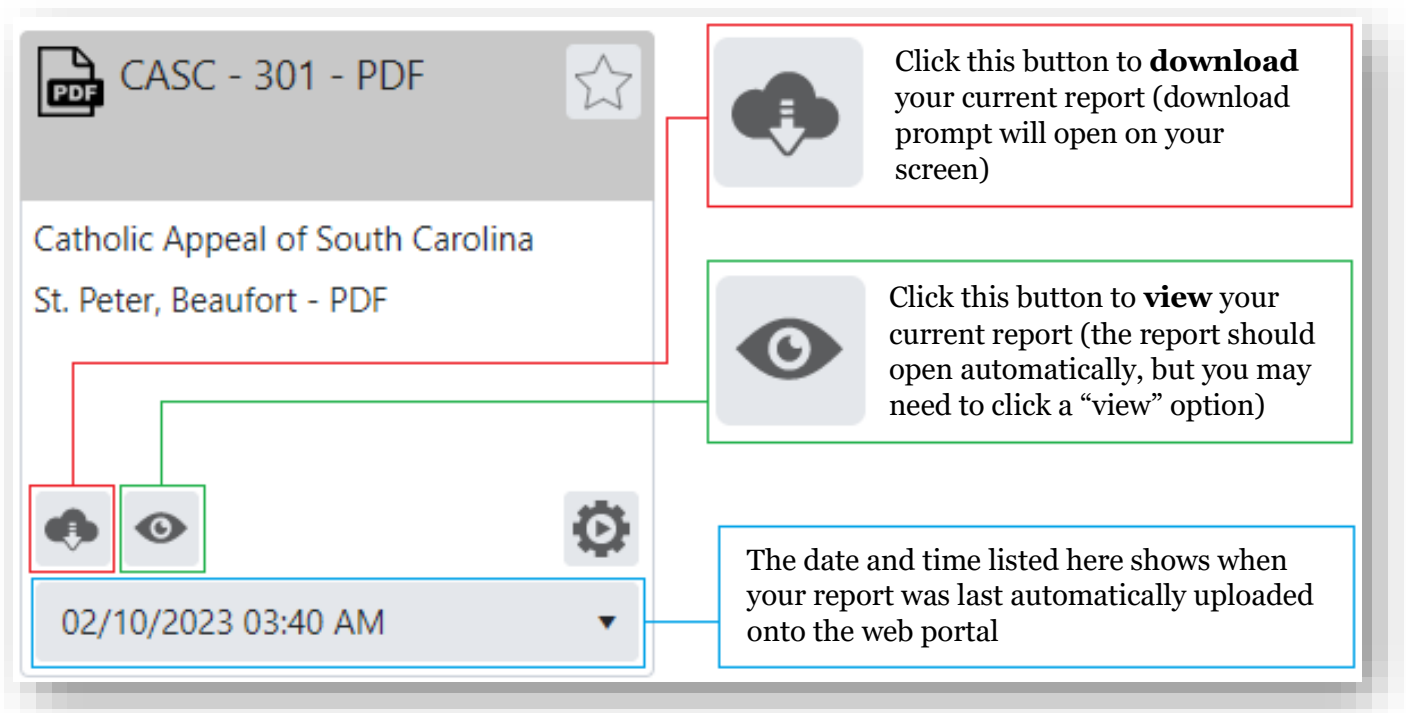
PLEASE SCROLL DOWN FOR INSTRUCTIONS TO ACCESS EACH CAMPAIGN'S REPORTS

ACCESSING YOUR PARISH'S REPORTS

- Once you click on the folder for the Bicentennial Campaign or CASC Campaign, you will see two boxes appear. These are your reports that are available to view or download. (CASC used as example).



- The box with **PDF** in the title stores the .PDF version of your progress report
- The box with **XLS** in the title stores the Microsoft Excel version of your progress report



UNDERSTANDING THE CATHOLIC APPEAL OF SC (CASC) REPORTS FOR YOUR PARISH



- An example of how your parish progress report for the CASC will look:

Catholic Appeal of South Carolina												
Parish Progress Report - 311 - St. Joseph, Charleston												
											2023 Goal:	\$49,475.00
											Raised-To-Date:	\$135.40
											Percentage of Goal:	0%
											Participating Families:	3
ID	Name	Salutation	Address	City	State	Zip	Phone	Email	Pledge / One-Time Gift	Pledge Balance	Date of Gift	Latest Gift Type
3110483	REMOVED	REMOVED	REMOVED	REMOVED	REMOVED	REMOVED	REMOVED	REMOVED	\$15.40	\$0.00	1/31/2023	Donation
3110390	REMOVED	REMOVED	REMOVED	REMOVED	REMOVED	REMOVED	REMOVED	REMOVED	\$20.00	\$0.00	1/15/2023	Donation
3111308	REMOVED	REMOVED	REMOVED	REMOVED	REMOVED	REMOVED	REMOVED	REMOVED	\$100.00	\$0.00	1/1/2023	Donation
									Count: 3	Total: \$135.40		

- The contact information of your parishioners who have donated to the 2023 Catholic Appeal of SC will be listed, including their home address, phone number, and e-mail address. **This information is reflective of the parishioner roster that was last provided by your parish to the Office of Stewardship.**
- The donor information is organized by **date of last gift**, meaning those who have given most recently will be listed at the top. This will make it easier to identify who has given since the last time you checked your report, and therefore should be contacted to thank for their donation.

2023 Goal:	\$49,475.00
Raised-To-Date:	\$135.40
Percentage of Goal:	0%
Participating Families:	3

- Under the header of the report, you will see your parish’s current overall progress towards its 2023 goal.
 - The “Raised-To-Date” amount reflects the amount that has been collected (payments) towards your goal. Pledge balances are not included in this total.
 - The “Participating Families” amount is the sum of all donors listed on the report.
- **This progress tracker can be utilized to communicate your parish’s current progress to parishioners (bulletin, e-mails, announcements at Mass)**

Pledge / One-Time Gift	Pledge Balance	Date of Gift	Latest Gift Type
\$27.50	\$0.00	1/25/2023	RecurringGiftPaym
\$10.00	\$0.00	1/25/2023	Donation
\$25.00	\$0.00	1/25/2023	Donation

- The Pledge/One-Time Gift amount, as well as any outstanding balances for your parishioners' pledges, will be listed on the right-hand side of the report.
- Under "Latest Gift Type," you will see three designations:
 - **Donation** – One-time gift (a payment received that does not fulfill a documented pledge)
 - **Recurring Gift Payment** – An automatic payment authorized by the donor to be withdrawn either monthly or annually
 - **Pledge Payment** – A payment received to fulfill a pledge for the 2023 CASC

How Should Your Parish Utilize This Report?

1. Thank Your Donors

- By checking these reports on a weekly or monthly basis, you will be informed of who from your parish has made a donation to the Catholic Appeal of SC. Acknowledging their participation and thanking them for their generosity is a true act of stewardship, and it will make your parishioners feel encouraged and appreciated for their participation.
- [CLICK HERE FOR A GUIDE ON THANKING YOUR DONORS](#)

2. Communicate Your Progress

- Your parishioners should be up-to-date on how their parish is progressing towards hitting its Catholic Appeal of SC goal.
- By posting the figures provided in this report in your parish bulletin, e-mails, or communication from the pastor **at least once a month**, your parishioners will understand how their parish is progressing in this important initiative.

UNDERSTANDING THE BICENTENNIAL CAMPAIGN REPORTS FOR YOUR PARISH



- An example of how your parish progress report for the Bicentennial Campaign will look:

Bicentennial Campaign Donor Report												
Parish Progress Report - 301 - St. Peter, Beaufort												
					Total Raised:		\$3,057,677.80					
					Current Amount Collected:		\$1,992,342.52					
					Fulfillment Rate:		65%					
					Still To Be Collected:		\$1,065,335.28					
					Number of Donors:		454					
ID	Name	Salutation	Address	City	State	Zip	Phone	Email	Pledge / One-Time Gift	Pledge Payments	Pledge Balance	Last Gift Date
30110288	Donor Information Removed							\$25,000.00	\$25,000.00	\$0.00	12/4/2020	
30100300	Donor Information Removed							\$30,000.00	\$30,000.00	\$16,970.00	3/2/2020	
62101190	Donor Information Removed							\$300.00	\$300.00	\$0.00	4/26/2022	
30100030	Donor Information Removed							\$3,000.00	\$3,000.00	\$0.00	1/26/2022	
30186112	Donor Information Removed							\$3,000.00	\$5,000.00	\$0.00	3/3/2020	
30181111	Donor Information Removed							\$1,000.00	\$0.00	\$400.00	2/18/2022	
30199444	Donor Information Removed							\$1,800.00	\$0.00	\$1,800.00	2/2/2020	
30110172	Donor Information Removed							\$12,000.00	\$400.00	\$11,500.00	3/10/2020	

- The contact information of your parishioners who have donated to your parish's Bicentennial Campaign will be listed, including their home address, phone number, and e-mail address. **This information is reflective of the parishioner roster that was last provided by your parish to the Office of Stewardship.**
- The donor information is organized by **alphabetically by last name**, although donations that were given anonymously or through loose cash will be listed under your parish name, which could be at the top of your report.

Total Raised:	\$3,057,677.80
Current Amount Collected:	\$1,992,342.52
Fulfillment Rate:	65%
Still To Be Collected:	\$1,065,335.28
Number of Donors:	454

- Under the header of the report, you will see your parish's current overall progress in collecting the funds that have been committed to the Bicentennial Campaign.
- The figure shown next to **Total Raised** is the sum of your **Current Amount Collected** and the **Still To Be Collected** amounts.
- The **Fulfillment Rate** is determined by dividing **Current Amount Collected** by **Total Raised**

Pledge / One-Time Gift	Pledge Payments	Pledge Balance	Last Gift Date
\$25,000.00	\$25,000.00	\$0.00	12/4/2020
\$20,000.00	\$30.00	\$19,970.00	3/2/2020
\$300.00	\$300.00	\$0.00	4/28/2022
\$3,000.00	\$3,000.00	\$0.00	1/26/2022
\$5,000.00	\$5,000.00	\$0.00	2/3/2020
\$1,000.00	\$600.00	\$400.00	2/18/2022
\$1,800.00	\$0.00	\$1,800.00	2/2/2020

- The **Pledge/One-Time Gift** amount shown for each donor is the amount that was originally committed by your donors.
 - If a donor originally pledged a certain amount but has since requested their pledge be written-off (cancelled) before the pledge was fully paid, **\$0.00** will be listed in the Pledge Balance column, meaning no more payments are expected.
 - If a donor made a **One-Time Gift** to the Bicentennial Campaign, the amount shown under **Pledge Payments** will match the amount shown under the **Pledge/One-Time Gift** column
- The **Pledge Payments** column will reflect the amount that has been paid by the donor toward their pledge.
- The **Pledge Balance** column will reflect the amount that is still to be paid by the donor toward their pledge.
- The **Last Gift Date** will reflect the date on which a payment was last received by the donor toward their pledge.
- All **HIGHLIGHTED** names are donors who are likely **past due** on pledge payments, as it will have been over a year since their last payment was received (on the date the report was provided.)

\$1,800.00	\$760.00	\$1,040.00	1/26/2023
\$1,800.00	\$60.00	\$1,740.00	6/24/2020
Total Raised:	\$1,992,342.52	\$1,065,335.28	

- At the bottom of the report, you will see the sums of the **Pledge Payments** and **Pledge Balance** columns.
- The sum of the **Pledge/One-Time Gift** column is **not provided**, as we must account for pledge write-offs and this total could skew the amount that a parish can actually expect to collect.

***Important Note About Opening This Report in Microsoft Excel**

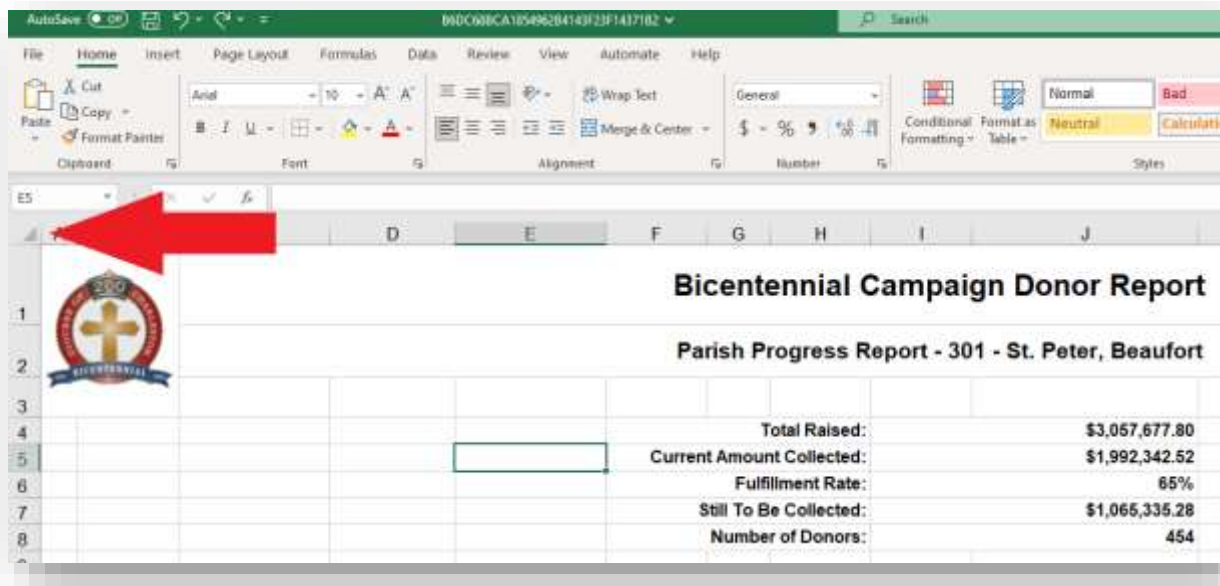
Bicentennial Campaign Donor Report
Parish Progress Report - 301 - St. Peter, Beaufort

Total Raised:	\$3,057,677.80
Current Amount Collected:	\$1,992,342.52
Fulfillment Rate:	65%
Still To Be Collected:	\$1,065,335.28
Number of Donors:	454

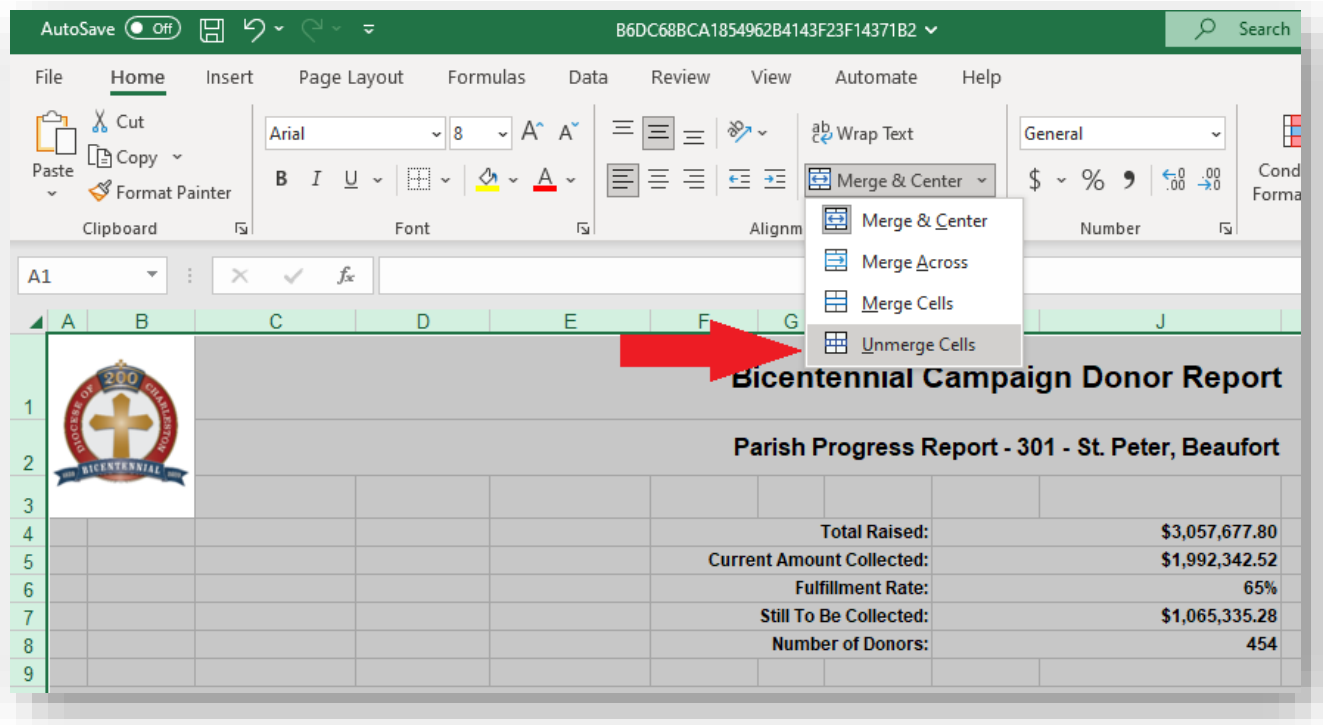
*Donor wishes to remain anonymous and/or is coded as "Do Not Solicit"
 High-priority donors have likely fallen behind on pledge payments and should be prioritized for outreach.

ID	Name	Salutation	Address	City	State	Zip	Phone	Email	Pledge / One-Time Gift	Pledge Payments	Pledge Balance	Last Gift Date
30110288			Donor information removed						\$25,000.00	\$25,000.00	\$0.00	12/4/2022
30108320			Donor information removed						\$20,000.00	\$20.00	\$19,979.00	3/2/2023
30110150			Donor information removed						\$300.00	\$300.00	\$0.00	4/28/2022
30109030			Donor information removed						\$3,000.00	\$3,000.00	\$0.00	1/26/2022
3019512			Donor information removed						\$5,000.00	\$5,000.00	\$0.00	2/3/2023
30181111			Donor information removed						\$1,000.00	\$950.00	\$400.00	2/18/2022
30199444			Donor information removed						\$1,800.00	\$0.00	\$1,800.00	2/2/2023
3011932			Donor information removed						\$12,000.00	\$450.00	\$11,550.00	3/10/2023
30101313			Donor information removed						\$600.00	\$650.00	\$0.00	12/7/2022
3013141			Donor information removed						\$300.00	\$10.00	\$290.00	3/1/2023

- The data included in this report can be sorted and re-arranged in Microsoft Excel, however certain changes must be made to the document once it is downloaded before doing so.



- Step 1:** Click the top left corner of the Excel file to highlight the entire workbook (where red arrow is pointing in image above)



- **Step 2:** Once entire workbook is highlighted, click the “Merge & Center” button found under the Home menu
- **Step 3:** Click “Unmerge Cells”
- Once the cells of the workbook are unmerged, you will be able to sort the data provided in the report and apply any formulas/functions you wish.

How Should Your Parish Utilize This Report?

1. Contact Parishioners Who are Past Due on Pledge Payments

- It is imperative that your parish take the lead in communicating the importance of pledge fulfillment, as well as keeping parishioners up-to-date on how campaign funds are addressing your parish's critical needs.
- The Catholic Community Foundation of South Carolina / the Diocese of Charleston will continue mailing pledge reminders to all parishioners who have made a pledge to the campaign, however only the parish knows how the funds that you have received are being put to use to address your needs. **If you learn from a donor that their pledge is no longer viable, please let the Office of Stewardship know right away.**
- [CLICK HERE FOR THE BICENTENNIAL CAMPAIGN GUIDE TO PLEDGE FULFILLMENT](#)

2. Communicate Your Progress

- Your parishioners should always be up-to-date on how their parish is progressing towards receiving the funds that were raised through the Bicentennial Campaign.

REMINDERS

- The information provided in these reports is **CONFIDENTIAL**. Do not distribute these reports to anyone that is not designated by your parish to handle this information.
- This web portal is only accessible by verified @charlestdioocese.org users. If a parish representative does not have a diocesan account, they will not be able to access this portal.
- Parish representatives/volunteers who are designated by the parish or its pastor to receive this information (but do not have an @charlestdioocese.org account) have the option to receive these reports automatically (in PDF and Excel format) to their personal e-mail account on a weekly basis.
 - Please contact Brian Alberts (balberts@charlestdioocese.org) if your parish wishes to add a designated individual on your parish's automatic distribution list.
- The data included in these reports is updated **weekly** every Friday morning from 3 AM to 5 AM, and will reflect the information as it is currently entered in the Diocese of Charleston's database.
- **FOR PARISH SECRETARIES / BOOKKEEPERS:** It is imperative that you attribute a donor's name to every donation to the CASC that you receive before sending it to the Diocese of Charleston for processing.
 - If you are unable to assign a donor's name (for example, if the gift is loose cash in an envelope designated for the CASC), the gift will be entered as an anonymous donation under your parish's name.

QUESTIONS?

- Contact the Diocese of Charleston's Office of Stewardship with any questions regarding the information provided in these reports.
- Answers to technological questions may not be provided right away as consultation with *Reporting Xpress* may be needed. We thank you for your patience if this is required.
- If your question is in relation to certain donation amounts or possible delays in gift processing, you may be redirected to the Office of Finance.

Office of Stewardship

- Carrie Mummert, Director – (843) 261-0435 – cmummert@charlestdioocese.org
- Brian Alberts, Associate Director – (843) 261-0518 – balberts@charlestdioocese.org
- Ruthie Major, Development Coordinator – (843) 261-0438 – ruthie@charlestdioocese.org
- Garland Crowley, Development Assistant – (843) 261-0437 – gcrowley@charlestdioocese.org