

MEMBER ENGAGEMENT

MINISTREE



 Catholic United Financial
MINISTREE
Community service rooted in faith

MinisTREE helps create a culture of volunteerism through service-based tasks designed to address volunteer needs that Catholic parishes and schools face throughout the year.



MINISTREE GUIDELINES

The MinisTREE program helps your parish community in three distinct ways: completing needed tasks throughout your community, growing your volunteer base, and the additional bonus of funds. For each separate task identified and completed by a parishioner or community member, Catholic United will make a donation to a parish or school. Your parish or school can complete activities and earn money throughout the year, all while creating a culture of volunteerism and engagement.

Guidelines

For **every 25 tasks** completed by volunteers (Catholic United members or non-members) and submitted online by the MinisTREE coordinator, \$125 will be sent to the school or parish, up to \$500 annually.

- Up to 50 cards will be considered toward funding in each six-month window
- Payment windows run from January 1 – June 30 and July 1 – December 31.
- For every 25 cards completed in a payment window, \$125 is earned, up to \$250 in each window.
- No rollover is allowed between payment windows. If you do not reach the 25 or 50 card threshold during the sixth month window, your card count will reset at zero for the following sixth month window and you will not receive payment for these cards.

All MinisTREE cards must have the **description and date needed** for the volunteer opportunity **filled out before giving them to volunteers**. Blank cards should never be given to volunteers who have completed a task not previously identified/filled out by the MinisTREE coordinator.

Completed cards can be verified for payment by the local MinisTREE Coordinator who enters and records the information through Catholic United's online activity tracking system.

A volunteer opportunity does NOT include participation in other Catholic United Member Engagement Programs or in the parish liturgy, such as server, lector, organist, choir member, greeter, etc.

VOLUNTEER NEED _____ **DATE NEEDED** _____

VOLUNTEER INFO

NAME _____

EMAIL _____

PHONE _____ **AGE** _____

I have more questions about life insurance, annuities and IRAs

I want more opportunities to volunteer, assist in disaster recovery and fundraising funds for Catholic schools

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Things to Consider

Tasks are to be written on the MinisTREE cards **before** being placed on the tree or bulletin board. The tree or bulletin board should be in a prominent place in the parish.

Cards ordered without a Volunteer Need (description) or Date Needed should be filled out by hand before being displayed.

There are no limits to the number of cards claimed for any given event or activity.

A volunteer opportunity **should be specific**, including the nature of the task.



REGISTERING FOR MINISTREE

Create an Account

Running the MinisTREE program requires you to create an account on the Catholic United Financial website. Doing this provides us with your information as the coordinator for your parish or school to ensure we have the right contact for future communications regarding the MinisTREE program.

If you already have an account on the Catholic United website, you do not need to create another account and can move to *Accessing MinisTREE* on the following page.

To create your new account, follow the steps below:

1. Visit the Catholic United Financial website (www.catholicunitedfinancial.org).
2. Click “Login” on the upper-left hand corner of the home page of the website.
3. Click “Create Account” under the *New Account?* on the account creation page.
4. You will now be asked to verify if you are an existing Catholic United member. If you are not a member of Catholic United financial, select “No” when prompted as a current policy holder.

Existing Member

Current Policy Holder? Yes No

Existing member information is already saved in our system and will pre-fill the required fields

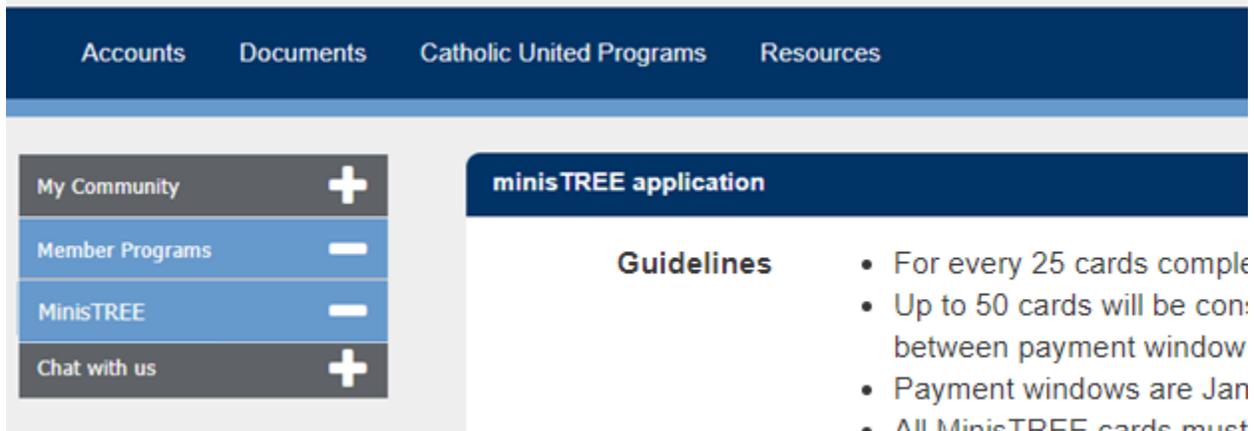
5. Enter your Account Information. All fields are required to create an account.
6. Create your Login Identification
 - Username
 - Must be 6-20 characters
 - Cannot be made up of all numbers
 - Is not case-sensitive
 - Password
 - Must be at least six characters
 - Must contain at least one uppercase and one lowercase letter
 - Must contain at least one number
 - Passwords are case sensitive
7. Select your security questions and provide answers. All fields are required to complete this section.
8. Agree to Terms and Conditions and choose e-delivery settings.
9. Enter the information displayed in the CAPTCHA image.
10. Click “Submit” to create your account on the Catholic United website.



Accessing MinisTREE

When you log in to your account on the Catholic United website, you will see several options in the header on your account. To access the MinisTREE program, you will navigate through the “Catholic United Programs” option by hovering over it in the header.

1. Click “MinisTREE” from the Catholic United Programs dropdown.
2. You will be directed to a page under “Member Programs” in the menu on the left-hand side of the page. You will see the MinisTREE Guidelines and Church selection on the main portion of the page.



Note: If you volunteer with us as a Fraternal Secretary or Administrative Coordinator for your Council or Parish Volunteer Team, the Member Programs menu will have additional options displayed.

Selecting a Church + Becoming Coordinator

1. Select your parish from the dropdown list next to the “Church” field. Type in the name of your city or parish (it is recommended to search by your parish city) to search by name.
 - If you do not see your parish in this list, contact Member Engagement to add your parish information to our network.
 - If a MinisTREE Coordinator is already assigned/running the program, a message will indicate this.
2. Agree to the terms and guidelines for the MinisTREE program by checking the box next to the disclaimer.
3. Choose whether the MinisTREE cards should be mailed directly to your home address or to the parish, care of the coordinator.

Church

By checking this box, I acknowledge that I have read and agree to the guidelines for the MinisTREE program. I agree to be the MinisTREE Coordinator for the selected parish and will notify the Member Engagement Department if I step down from this position. I understand that Catholic United reserves the right to review and adhere to the final decision regarding status or declination of a submission.

Mail To

Please Select...
Please Select...
Home
Parish



ORDERING MINISTREE CARDS

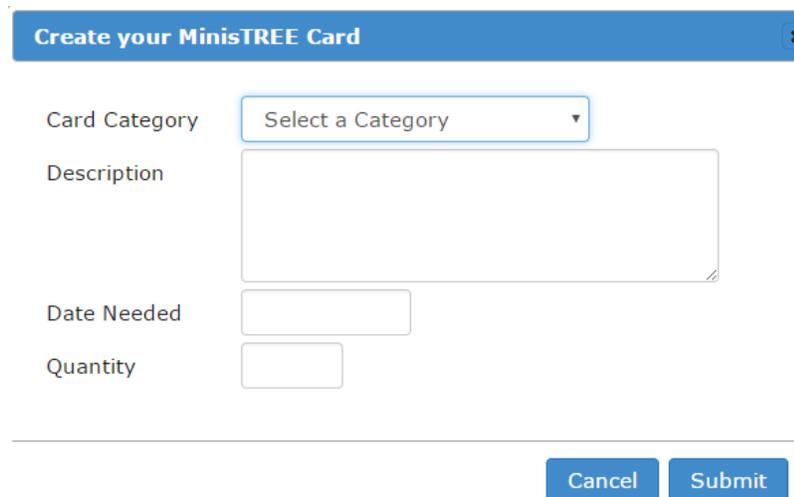
In the “Order Cards” section, you will be able to specify what information you would like pre-printed on individual cards when they are sent to you. Or, you will be able to order blank cards that will come with the parish and contact information pre-filled, that you may handwrite later as new needs arise.

1. Select the “Order Cards” tab to access the page for tracking card orders.



The screenshot shows a web interface with two tabs: "Card Management" and "Order Cards". Below the tabs is a blue header bar labeled "Order Details". Underneath is a table with a dark blue header row containing three columns: "Select All", "Quantity", and "Category".

2. Click the “Add Cards” link on the right-hand side of the page to begin entering cards for this order. You will need to fill out the following information for each different card or batch:



The screenshot shows a form titled "Create your Ministree Card" with a close button (X) in the top right corner. The form contains the following fields:

- Card Category: A dropdown menu with the text "Select a Category" and a downward arrow.
- Description: A large text input area.
- Date Needed: A date input field.
- Quantity: A numeric input field.

At the bottom of the form are two buttons: "Cancel" and "Submit".

- Choose a card category.
 - Donation – items you would like to request for donation from parish members. (ex: DVD player for youth room, materials for service project, food items)
 - Event Volunteer – people you will need to do work at a specific event. (ex: workers at fall festival booth, setup/cleanup help, mission trip chaperone)
 - Service Need – activities around the parish and/or community that need doing. (ex: lawn maintenance, filing help, driving elderly to mass, cleaning)

NOTE: Not all volunteer opportunities are known in advance to order cards pre-printed with the information on them. To order blank cards that will allow you to hand-write the opportunity when the need arises, simply leave the description and date fields (outlined on



the next page) blank. The description and date will need to be entered in MinisTREE online when you receive the completed card from a volunteer.

- Write a description.
 - Put together a description of the volunteer opportunity that best communicates what needs to be done. What is written in this section is what will be printed on the card when you receive it.
 - IF YOU ARE ORDERING BLANK CARDS IN SPECIFIC CATEGORIES, LEAVE THIS FIELD BLANK.
 - Choose a date.
 - Include the date the task should be completed by, or the date on which it will take place (the latter is mostly for Event Volunteer Cards).
 - IF YOU ARE ORDERING BLANK CARDS IN SPECIFIC CATEGORIES, LEAVE THIS FIELD BLANK.
 - Indicate quantity
 - If you have multiple volunteer opportunities of the same nature, you can simply create one batch by including the number you would like printed with the same information you entered above.
 - If this is an individual volunteer opportunity and you will not need multiple copies of the same card, enter 1.
 - Submit
 - This will add the card(s) to the list of cards you are compiling for this order and will display in the “Order Details” section of the page.
3. Repeat the process (starting at step 2 with “Add Cards”) until you have entered the needed cards.
4. Select the cards you would like to include in this order by clicking the individual check boxes next to each entry or by choosing “Select All” on the left-hand side of the form.

<input checked="" type="checkbox"/> Select All	Quantity	Category	Description
<input checked="" type="checkbox"/>	5	Service Need	Clean church basement.
<input checked="" type="checkbox"/>	1	Donation	DVD player for youth programs.

- A confirmation screen will appear letting you know how many cards you are requesting in this batch.
 - Click “Okay” to submit your order of MinisTREE cards.
 - The status for individual cards and card batches will be set to “Pending” and can now be found in the “Card Management” tab.
5. The MinisTREE cards will be printed and mailed to the address we have on file for the location specified, either “Home” or “Parish.”



MANAGING MINISTREE

Managing Cards

Member Engagement will review and process the cards submitted in each order. Once the cards have been approved and downloaded for formatting and mailing, the card status will switch to “Active,” at which point you will be able to add the volunteer information.



You have no cards to manage. Click on the Order Cards tab to begin a new order.

To see the MinisTREE cards in your program, click on the Card Management tab. The view will default to active cards, but you can filter your view to see cards with other statuses, outlined later in this process.

The Card Management tab is where you will claim your completed MinisTREE cards when they are returned to you.

Each individual card is assigned a specific card ID to help track and identify cards in the online system. This will happen when Member Engagement prints your cards and will assist in finding the correct card when entering each completed volunteer opportunity.

Card Lookup					
Select A Card	Select a Category	Active	Year		
Edit	Card ID	Status	Category	Volunteer	Description
Edit	243278	Active	Service Need	Add Volunteer	Clean church basement.
Edit	243279	Active	Service Need	Add Volunteer	Clean church basement.
Edit	243280	Active	Service Need	Add Volunteer	Clean church basement.

The online version of MinisTREE allows you to follow the progress of your cards from order to completion. A card in the system will have several statuses to help you understand the process:

- **Requested** – Card has been ordered and submitted for review, printing, and sending.
- **Active** – Member Engagement has approved the volunteer opportunity, a Card ID has been assigned, and the card has been sent to the coordinator.
- **Submitted** – A card has been returned and the volunteer information entered. Cards will remain in this status until the 25-card threshold has been reached.
- **Processing Payment** – A total of 25 cards have been completed within the appropriate six-month window and payment is being processed.
- **Complete** – The opportunity has been completed and has been paid as part of a batch of 25 completed cards.



Claiming MinistREE Cards

1. When a completed card is returned to you, search for the corresponding Card ID in the MinistREE online program with the one listed on the card. To add the volunteer information, click “Edit” next to the appropriate card ID.
 - Active cards that have not been fulfilled will have “Add Volunteer” listed in the Volunteer column on the Card Management tab.
 - An “Edit Card” section will appear at the top of the card list, displaying the Card ID and Person field.

Note: if a description was not ordered/printed on the card, a Description field will also appear along with the Card ID and Person Fields.

2. To mark the card complete, click “Select” next to the Person field to open the volunteer search.

Card Lookup

Select A Card ▼ Select a Category ▼ Active ▼ Year ▼

Edit Card

Card ID 243278

Person **Select**

Save

3. Type in the first and last name as they appear on the completed card and Click “Find.”
4. If the volunteer is a member of Catholic United or you have added them to the database previously, their name and address should appear in the search results. If no name appears, you will need to add this person to your volunteer database following these steps:

Name Search ✕

Test Search or Search by Address Find **Add Person**

No results found

Cancel

- Click “Add Person” next to the search fields at the top of the Name Search window.
- Fill out the required (*) fields on the form, including first and last name as they appear on the card and the address of the volunteer.
 - If the volunteer has included their email address or phone number on the card, be sure to enter this during this step as it will help with communication in the future.
- Click “Add Person” at the bottom of the screen to add the volunteer to the database. This person will now appear when their name is searched if they submit additional cards in the



MINISTREE RESOURCES

5. After selecting/adding the volunteer from/to the database, the name of the volunteer will appear in the Person field. Click “Save” in the Edit Card section to complete to the card.

The screenshot shows the 'Edit Card' section of the MinisTREE interface. At the top, there is a 'Card Lookup' section with four dropdown menus: 'Select A Card', 'Select a Category', 'Active', and 'Year'. Below this is the 'Edit Card' section, which includes a 'Card ID' field with the value '243278'. Underneath, there is a 'Person' field containing the text 'Volunteer Name' and a blue 'Select' button. A red rectangular box highlights a blue 'Save' button located below the 'Person' field.

Bulletin Announcement

Catholic United Financial is excited to introduce a new program to our parish. *MinisTREE* is designed to help identify and meet some of the volunteer needs in our parish, school and community that are often overlooked. These volunteer needs are identified through meetings between parish staff and school staff along with Catholic United Financial members and our Catholic United Financial field representative.

- Volunteer service opportunities will be recorded on MinisTREE volunteer activity cards and hung on the MinisTREE in the school and church entry.
- All parishioners are encouraged to review the cards weekly for activities that interest you and fit your family's schedule.
- By participating in this program, you are helping our parish meet a critical unmet need and financially supporting our school and religious education program.
- Once you have completed the volunteer activity, follow the directions on the card to verify the completion of the activity. Sign the card and return it to the MinisTREE Coordinator listed on the card.

For every 25 “leaves” turned in, Catholic United Financial will contribute \$125, up to a maximum of \$500 in a calendar year, to support our school and religious education program.

If you know of an unmet volunteer need in our community that MinisTREE could help address, please contact (Field Representative) at (Phone Number).



Pulpit Announcement

I am excited about a new program that Catholic United Financial has developed to benefit our parish and community. *MinisTREE* is a partnership between Catholic United Financial and parish, school and religious education leadership to identify and address unmet volunteer needs in our parish, school and surrounding community. These volunteer needs are identified through meetings between parish and school staff along with Catholic United Financial members and our Catholic United Financial field representative.

By participating in this program, you are helping our parish meet a critical unmet need and financially supporting our school and religious education program. Because for every 25 “leaves” turned in, Catholic United Financial will contribute \$125, up to a maximum of \$500 in a calendar year, to support our programs.

Please stop by the Catholic United Financial MinisTREE located (in the back of the gathering space), to find a volunteer need that interests you. Once you have completed the volunteer activity, sign the card and drop it in the offertory collection next week!



Frequently Asked Questions

Can I give a volunteer a card to fill out after he/she has completed a task that was not on our tree?

No. The MinisTREE program is designed so that unmet and often overlooked tasks can be identified and listed on the tree. Each task should be written out and taken from the tree in advance of the work being done.

What happens if we get 50 cards turned in and it's only March?

You should keep the MinisTREE program in effect even if you have already earned your semi-annual maximum of 50 cards. Your parish and community are benefiting from the tasks being completed even after the payment has been made. Also, remember to publicize how the MinisTREE money is being used and recognize groups that volunteered.

If we put 100 cards on the tree for one service project and fill all the unmet needs for that day, is that okay?

No, we encourage the MinisTREE program to be used to provide a variety of service opportunities to the parish throughout the year, not just to provide a large number of volunteers for one event.

If one of our other committees or groups puts a tree out in December, what should we do?

During these high commitment times, the MinisTREE should be given a temporary rest so as not to compete with another worthy cause.

Is it okay to make up task cards specifically for our confirmation students needing service hours?

Absolutely! Just be sure you have an adequate number of tasks for the rest of the community.

How do I identify volunteer needs in the parish/school/community?

Try having a meeting that includes the Pastor, Catholic United Financial Representative, Catholic United Financial local council officers, school principal (if applicable), religious education director, social justice committee chair (or similar), home and school association chair (if applicable), building & grounds person. Bring your stack of MinisTREE Leaves and everyone can start filling them out at the meeting. It might be good to have these meetings on a quarterly basis to have new tasks on an ongoing basis.

