



Catholic United Financial
MINISTREE
Community service rooted in faith

PROGRAM & USER GUIDE

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Catholic United
Financial



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MinisTREE Program Overview

The MinisTREE program helps your school or 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 payment to the 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

Payment Windows

- There are TWO payment windows each calendar year. **January 1 – June 30 and July 1 – December 31.**
- Up to 50 cards will be considered toward funding in each window. ***Any cards submitted after 50 will not be paid out.***
- For every 25 cards completed in a payment window, \$125 is earned. Max is \$250 every six months.
- **No rollover** is allowed between payment windows. If you do not reach the 25 or 50 card thresholds during the six-month window, your card count will reset at zero for the following sixth month window and **you will not receive payment for these cards.**
- Completion date is based on the date the volunteer information is logged on the Catholic United Website, **NOT** the date of the volunteer task.

General Guidelines

- There are no limits to the number of cards for any given event or activity.
- Available cards should be displayed in a prominent place in the parish, on a tree or bulletin board. See examples ([page 3](#))
- All MinisTREE cards must have the description and date needed for the volunteer opportunity filled out before giving them to volunteers. 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 **CAN NOT** include participation in other **Catholic United Member Engagement Programs such as Grants4Good or Matching Grant** or in the **parish liturgy**, such as server, lector, organist, choir member, greeter, etc.

Privacy Statement

Visit <https://www.catholicunitedfinancial.org/company/privacy-statement/> to view Catholic United Financial's Privacy Statement on Catholic United Financial's Commitment to Privacy, Confidentiality and Security Procedures, Information We May Collect and Use, and Sharing Within and Outside the Catholic United Family.

MinisTREE Resources

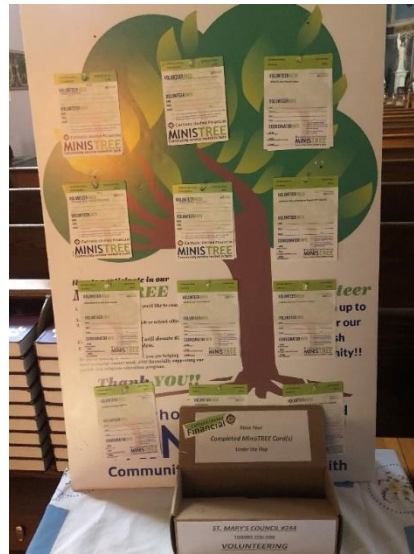
Displaying your MinisTREE cards

There are many options for how to display your MinisTREE cards in your church. It is common to have a dedicated bulletin board in a high traffic area, or to create a free-standing display. The more prominent the display is within the parish, the easier it will be to promote to your community. Note that cards come with a hole punched in the top, making them easier to hang. Below are a just a few examples.

1



2



3



1. Cards on an actual tree in Elysian, MN!

2. A piece of foamboard with small hooks is used in the back of the sanctuary in Strasburg, ND

3. A custom tree cutout has lots space for all of the volunteer needs in Detroit Lakes, MN.

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/or school staff along with Catholic United Financial members and our Catholic United Financial sales 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/or religious education program.
- Once you have completed the volunteer activity, follow the directions on the card to complete the activity. Sign the card and return it to the MinisTREE Coordinator listed on the card.

For every 25 cards 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 (MinisTREE Coordinator) at (Phone Number) or (Sales 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 sales 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!

Signing Up as a MinisTREE Coordinator

Create your 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* section of the login page.
4. You will now be asked to verify if you are an existing Catholic United member. If you are a current member of Catholic United, skip to **step 6**. 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

5. Enter your account Information. All fields are required to create an account. **Skip to step 7** to finish account setup.

Account Information

First Name	<input type="text"/>
Last Name	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text" value="Select A State"/>
Zip	<input type="text"/>
Date of Birth	<input type="text"/>
<small>Enter valid date and numeric digits. Example: enter 01/31/2010 for January/31/2010</small>	
Primary Phone #	<input type="text"/>
Phone Type	<input type="text" value="Select..."/>
<small>Enter ten numeric digits. Example: (999) 999-9999</small>	
SS # (Last 4 digits)	<input type="text"/>
Confirm SS # (Last 4 digits)	<input type="text"/>
Email	<input type="text"/>
<small>If e-Delivery selected, Email is required.</small>	

- As an existing member, you will need your policy number and the last 4 digits of your social security number to create your account. If you do not know your policy number, please call our home office (1-800-568-6670) and ask to speak with our Member Services Department. Member accounts will have all contact information from step 5 pre-filled based on our records.

Create an Account

Existing Member

Current Policy Holder? Yes No

Policy Number
Enter one of your existing policy numbers.

SS # (Last 4 digits)

Confirm SS # (Last 4 digits)

- 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

- Select your security questions and provide answers. All fields are required to complete this section.

- Agree to Terms and Conditions and choose e-delivery settings.

- Enter the information displayed in the CAPTCHA image.

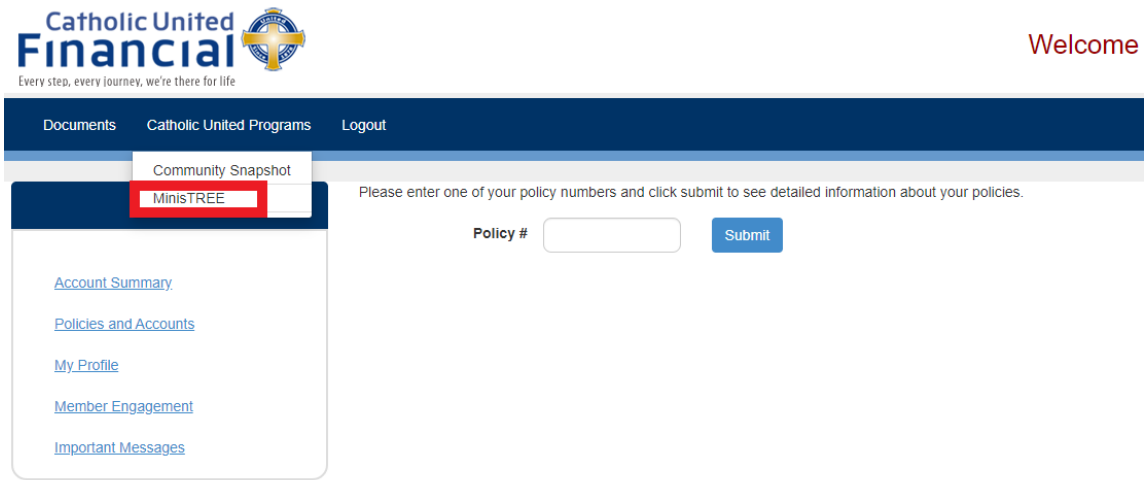
- Click "Submit" to create your account.

- Use the username and password you just created to log in to the site.

Accessing MinisTREE

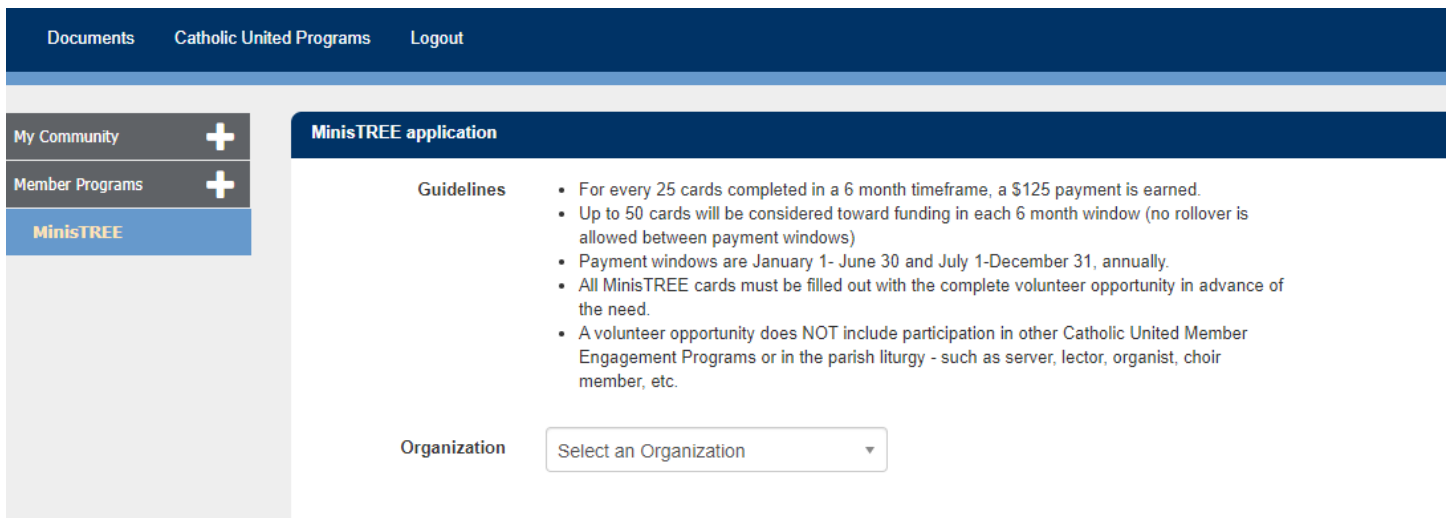
When you log in to your account on the Catholic United website, you will see several options in the header on your account. To access the MinisTREE program, you will navigate through the "Catholic United Programs" option by hovering over it in the header.

1. Click “MinisTREE” from the Catholic United Programs dropdown.



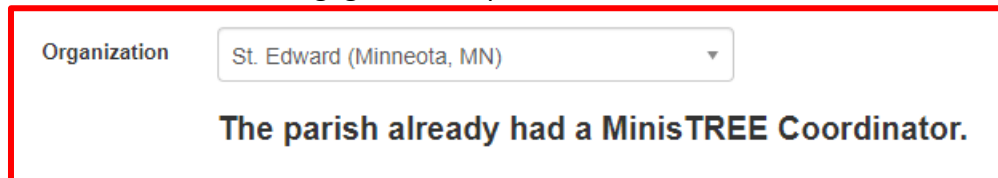
2. You will be directed to a page under “Member Programs” in the menu on the left-hand side of the page. You will see the MinisTREE Guidelines and Organization selection on the main portion of the page.

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



Selecting a Church & Becoming Coordinator

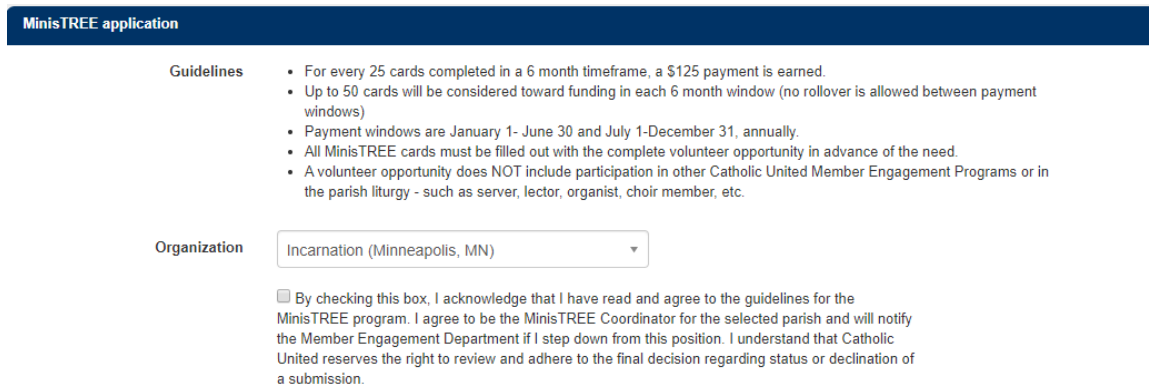
1. In the "Organization" field, search for your parish or school. It is recommended to search by the name of your city or town for the most accurate results.
 - a. If you do not see your organization in this list, contact the Member Engagement Department to have it added to our parish network.
 - b. If there is already a coordinator assigned for this organization, you will see the following message. Only one coordinator may be assigned per organization. If you would like to know who the current coordinator is, or have that person removed from the position, please contact the Member Engagement Department.



Organization St. Edward (Minneota, MN) ▼

The parish already had a MinisTREE Coordinator.

2. Once you find your organization, you will see a check box appear below. Check this box to sign up to run MinisTREE for this parish or school.



MinisTREE application

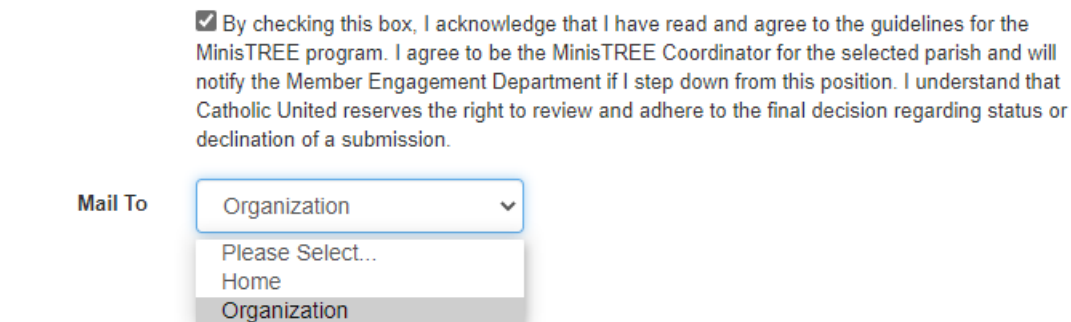
Guidelines

- For every 25 cards completed in a 6 month timeframe, a \$125 payment is earned.
- Up to 50 cards will be considered toward funding in each 6 month window (no rollover is allowed between payment windows)
- Payment windows are January 1- June 30 and July 1-December 31, annually.
- All MinisTREE cards must be filled out with the complete volunteer opportunity in advance of the need.
- 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, etc.

Organization Incarnation (Minneapolis, MN) ▼

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.

3. After checking the box, select whether your MinisTREE cards should be mailed to your home address (or whatever address is tied to your account on our website) or directly to the organization.



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 Organization ▼

- Please Select...
- Home
- Organization

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.

1. As coordinator, your full page will look like the one below. Select the “Order Cards” tab to access the page for placing new card orders.

The screenshot shows the 'MinisTREE application' interface. At the top, there is a dark blue header with the text 'MinisTREE application'. Below this, there are several sections: 'Guidelines' with a list of rules, 'Organization' with a dropdown menu set to 'St. Olaf (Minneapolis, MN)', a checkbox for acknowledging guidelines, and 'Mail To' with a dropdown set to 'Home'. At the bottom, there is a navigation bar with 'Card Management' and 'Order Cards' (highlighted with a red box). Below the navigation bar is a table with columns: 'Select All', 'Quantity', 'Category', 'Description', 'Status', and 'Delete'. An 'Add Cards' link is visible in the top right corner of the table area.

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 the 'Create your MinisTREE Card' form. It has a blue header with the title and a close button. The form contains the following fields: 'Card Category' (a dropdown menu with 'Select a Category' selected, labeled A), 'Description' (a large text area, labeled B), 'Date Needed' (a date input field, labeled C), and 'Quantity' (a number input field, labeled D). At the bottom right, there are two buttons: 'Cancel' and 'Submit' (labeled E).

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.

- A) Choose a card category.
- a. Donation – items you would like to request for donation from parish members.
(ex: DVD player for youth room, materials for service project, food items)
 - b. 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)
 - c. Service Need – activities around the parish and/or community that need doing.
(ex: lawn maintenance, filing help, driving elderly to mass, cleaning)

- B) 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. Do not use special characters i.e. 's (" - / when writing a description.

IF YOU ARE ORDERING BLANK CARDS LEAVE THIS FIELD BLANK.

- C) Choose a date.
- a. 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 LEAVE THIS FIELD BLANK.

- D) Indicate quantity
- a. If you have multiple volunteer opportunities of the same nature, you can simply create one batch by including the number of cards you would like printed with the same information you entered above.
 - b. If this is an individual volunteer opportunity and you will not need multiple copies of the same card, enter "1".

- E) Submit
- a. 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. See the sample order ([Page 11](#)).

- 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, then click "Order Cards".



- A confirmation screen will appear letting you know how many cards you are requesting in this batch. There is a minimum order of 25 cards.

- 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.

- The MinisTREE cards will be printed and mailed to the address we have on file for the location specified, either "Home" or "Organization".

Sample MinisTREE card order

Order Details					Add Cards
Select All	Quantity	Category	Description	Status	Delete
<input type="checkbox"/>	2	Donation	Ream of copy paper for parish office.	Pending	Delete
<input type="checkbox"/>	8	Event Volunteer	Work the children's game station at parish picnic.	Pending	Delete
<input type="checkbox"/>	10	Donation	Donated desserts needed for parish picnic. One pan/dish - please mark if desserts contain nuts.	Pending	Delete
<input type="checkbox"/>	1	Service Need	On-call snow removal week of Dec 7-14, if needed.	Pending	Delete
<input type="checkbox"/>	15	Service Need		Pending	Delete
<input type="checkbox"/>	20	Event Volunteer		Pending	Delete

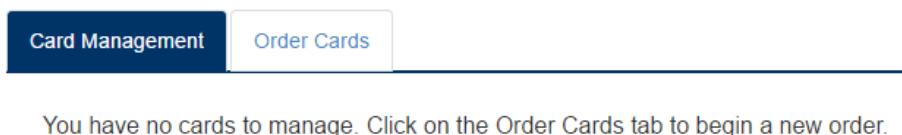
[Order Cards](#)

The order above contains 6 different types of cards for a total order of 56 cards. The "date needed" field is not shown in this order details view, but if one was indicated in the order it will be outlined below.

1. **Two** cards, each one will ask for the **donation** of a ream of copy paper for the parish office.
2. **Eight** cards for **event volunteers**. Each volunteer will work at the parish picnic on September 17.
3. **Ten** cards asking for **donations** of desserts on a September 17.
4. **One** card for a **service need**. The full week is in the description and the “date needed” field shows 12/7.
5. **Fifteen** blank **service need** cards. The dates and descriptions will be filled in by the coordinator by hand once needs are determined.
6. **Twenty** blank **event volunteer** cards. The dates and descriptions will be filled in by the coordinator by hand once needs are determined

Managing the MinisTREE Program

The Card Management tab is where you will assign volunteers to your completed MinisTREE cards when they are returned to you. To see the cards in your program, click on this tab.



Each individual card is assigned a specific card ID number to help track and identify cards in the online system. The ID number is assigned when the Member Engagement Department prints your card. Once cards have been printed, they will appear in the “card management” tab with an “Active” status.

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:

- **Active** – Member Engagement has approved the volunteer opportunity, a Card ID has been assigned, and the card has been printed and mailed.

- **Pending Payment** – A card has been returned and the volunteer information entered by the MinisTREE Coordinator. 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.

Submitting MinisTREE Cards for Payment

1. When a completed card is returned to you, search in the “select a card” box for the corresponding Card ID number listed on the card.

Total paid this year: \$0.00
Cards needed for next payment: 25

Card Lookup

Select A Card

Select a Category Card Status

Status	Category	Volunteer	Description	Submitted
Active	Event Volunteer	Add Volunteer	Add Description	N/A
Active	Event Volunteer	Add Volunteer	Add Description	N/A
Active	Event Volunteer	Add Volunteer	Add Description	N/A
Active	Event Volunteer	Add Volunteer	Add Description	N/A
Active	Event Volunteer	Add Volunteer	Add Description	N/A
Active	Event Volunteer	Add Volunteer	Add Description	N/A
Active	Event Volunteer	Add Volunteer	Add Description	N/A
Active	Event Volunteer	Add Volunteer	Add Description	N/A

2. After locating the correct card ID number in the list, click the “edit” link located in the left column of the card management table.

Edit	Card ID	Status	Category	Volunteer	Description	Submitted
Edit	75454	Active	Event Volunteer	Add Volunteer	Add Description	N/A

3. An “Edit Card” section will appear at the top of the card list, displaying the Card ID and Person field.

Edit Card

Card ID 75454

Person

Description

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.

- To mark the card complete, click "Select" next to the Person field to open the volunteer search.
- Type in the first and last name as they appear on the completed card and Click "Find."

Name Search

and/or

Select	Name	Address
<input type="checkbox"/>	JOE JOHNSON	3595
<input type="checkbox"/>	JOE JOHNSON	16894
<input type="checkbox"/>	JOE JOHNSON	13825
<input type="checkbox"/>	JOE JOHNSON	1171
<input type="checkbox"/>	Joe Johnson	140

The search above is for someone with the name "Joe Johnson". There are 5 results. Normally the full address will be shown, but they have been hidden for the sake of being in this manual.

- 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. Click the check box next to their name to select. Skip to step 8.
- If the person is not yet in our system, you will need to add them. Start by clicking "Add Person".

Name Search

or

No results found

- Fill out the required (*) fields on the form. Always required are First and Last Name of the volunteer, and their ZIP code. One other form of communication is also required (full address, mobile phone, home phone, OR email address).

Add A Person

Only add a new person if they cannot be found in the search.
Also, adding as much information as possible will help prevent duplicate entries of volunteers.

First Name * required
Last Name * required
Address *
City
State ▾
Zip Code * required
Mobile Phone *
Home Phone *
Email *

* Please enter an Address or Mobile Phone or Home Phone or Email.

- 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 future.

- After selecting/adding the volunteer from/to the database, the name of the volunteer will appear in the Person field. If the description field is open, fill in that task that the volunteer completed. Click "Save" in the Edit Card section to complete to the card.

Edit Card

Card ID 75454

Person

Description

- The status in the "Card Management" table will now say "pending payment" where it will remain until it can be included in a batch of 25 for payment.

Payment Process

Payments for the MinisTREE program will only be made in batches of 25 cards – or \$125 at a time. Once you have submitted 25 cards within the same payment window (Jan 1-Jun 30, Jul 1-Dec 31) the website will automatically initiate a \$125 payment. If the threshold of 25 cards is not met during a payment window, the submitted cards will be forfeited and will not receive payment. Cards do not roll over between payment windows. The payment window is determined by the date the card is submitted online, NOT the date the activity took place. The maximum payment in a payment window is \$250, for a total of \$500 per calendar year.

For example:

- If 23 cards are submitted in a payment window, no payment will be sent.
- If 48 cards are submitted, a \$125 payment will be sent for the first 25 cards. The remaining 23 cards will not receive payment.
- If 75 cards are submitted in a payment window, \$250 will be sent. The extra 25 cards do not roll over to the next window and will not trigger an additional payment.

If your parish is associated with a Catholic United Financial Council or Volunteer Team, the payment will be sent directly to the team checking account via direct deposit. If your parish is not associated with a Catholic United Financial volunteer team the check will be mailed to your local Sales Rep for delivery.

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 people 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?

Yes, but 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 many volunteers for one event. If you do have one very large event, remember that there is a 50-card maximum for payment during each half of the year.

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.

Can our church have multiple coordinators for the MinisTREE program?

No, not currently. Our website is only able to connect one user for each organization running the program. If you are no longer able to run the program, or would like to transfer MinisTREE Coordinator access on the website please contact the Member Engagement Department.

I just completed my first batch of cards. How do we receive payment?

If you are located at a parish where we have a Catholic United Council or Volunteer Team, the payment will come in the form of a direct deposit to the group checking account. If your parish does not have a Council/VT a physical check will be sent to your local sales rep for delivery.

We were only able to complete 37 cards during a payment window. What happens with our unpaid cards?

Since the payment thresholds are set at exactly 25 cards during each 6-month window, any cards between 25 and 49 would not receive payment. A \$125 payment would be made for the first 20 cards, and the remaining 12 would not receive payment. Card payment status is determined by the date they are completed on the website, and they do not roll over between payment windows.

I ordered cards last year and wound up not using them all. Can I still use them, or do I need to order new ones?

If a card has not been completed on the website with a volunteer, it can still be used. The website only looks at the date the card is turned in for payment, so the date the card was ordered doesn't matter. However, if your cards would be confusing to volunteers because of the printed date or description, please order new ones.