

SECRETARY/BOOKKEEPER/GIFT REPORTING PROCEDURES

RESPONSIBILITIES

The Parish Secretary/Bookkeeper is responsible for the collection, auditing, recording and mailing of all pledges and/or payments received at the parish to be sent to the BSA Office.

This includes the:

- **Prepare Gift Reporting Form, accompanied with check payments** submitted.
 - **Reports are to be mailed** to the Diocese, following your second collection each month and addressed as follows:
Office of Stewardship and Development
Bishops Services Appeal
1408 Carmel Drive
Lafayette, Louisiana 70501
 - ***NOTE: Any report received without payments will be returned to Parish office, to be re-submitted with appropriate payments.***
- All checks are to be made payable to **“Bishop’s Services Appeal”**
 - ***These checks are NOT to be included with any other checks sent to the Diocese (through the Office of Financial Affairs or Parish Finance – i.e. assessment checks, etc.)***

MATERIALS

Pledge Forms – The BSA office utilizes different pledge card formats, depending on the method of solicitation, to record campaign gifts.

- **Mailed Pledge Letters/ Form:** A pre-printed pledge form will be mailed to all current, lapsed and non-donors on record for the Diocese. These mailed pledge forms are most frequently turned in via #9 return envelopes mailed directly back to the Diocese of Lafayette - Office of Stewardship and Development.
- **In-Pew/Commitment Weekend Cards:** A printed pledge card/return envelope will be used for direct mailing back to the Diocese during the in-pew appeal during Commitment Weekend.

Gift Reporting Form – A form used by the Parish Secretary/Bookkeeper in reporting gifts to the Diocesan Office **must** accompany pledge cards along with initial first payments on pledges.



PROCESSING GIFTS

The Parish Secretary/Bookkeeper is responsible for recording completed pledge cards and initial payments and sending **the completed pledge cards, payments and Gift Reporting Form to the BSA Office.**

The steps for processing gifts are as follows:

- Collect all completed pledge cards and initial payment checks.
 - **No holding of pledges and payments (i.e. checks) in the parish.**
 - **Donors want to be acknowledged soon after making their gifts.**
- Verify all checks are signed, dated and made payable to “Bishop’s Services Appeal”.

BSA IN-PEW COMMITMENT WEEKEND PLEDGE CARDS:

- † Bishop’s Services Appeal (BSA) pledge cards received in the parish offertory are to be collected and mailed (or delivered) to the **Office of Stewardship and Development.**

CHECKS MADE PAYABLE TO PARISH:

- † Checks received and made payable to parish are to be deposited in the **PDS Liability Account #251100.**
- † **A parish check is then remitted to the Diocese of Lafayette made payable to “Bishop’s Services Appeal”** along with a completed **Gift Reporting Form or Parish Data System (PDS) Church Office (Batch) Report.** The form is **required to be submitted at least monthly**, and is to include the names of donors, complete address and gift amount.
- † Mail, email (csleblanc@diolaf.org) or fax (337-261-5645) the completed **Gift Reporting Form or Church Office (Batch) Report** to the **Office of Stewardship and Development.**

CASH:

- † Cash received is to be deposited in the **PDS Liability Account #251100.**
- † **A parish check is then remitted to the Diocese of Lafayette made payable to the “Bishop’s Services Appeal”** along with a completed **Gift Reporting Form or Parish Data System (PDS) Church Office (Batch) Report.** The form is **required to be submitted monthly** and is to include the names of donors, complete address and gift amount.
- † Mail, email (csleblanc@diolaf.org) or fax (337-261-5645) the completed **Gift Reporting Form or Church Office (Batch) Report** to the **Office of Stewardship and Development.**



CHECKS MADE PAYABLE TO DIOCESE OF LAFAYETTE OR BISHOP'S SERVICES APPEAL (BSA):

- † Checks received and made payable to Diocese of Lafayette or Bishop's Services Appeal (BSA) are collected, and mailed to the **Office of Stewardship and Development**.
- † **DO NOT** deposit checks.
- † Parish bookkeeper is not required to enter gifts into parish accounting/Parish Data System (PDS) Church Office database system.

PARISH ENVELOPE SYSTEM:

- † Parish envelopes received in the parish offertory are collected, **opened** and reviewed.
- † Checks received and **made payable to parish** are to be deposited in the **PDS Liability Account #251100**.
- † A **parish check is then remitted to the Diocese of Lafayette made payable to "Bishop's Services Appeal"** along with a completed **Gift Reporting Form or Parish Data System (PDS) Church Office (Batch) Report**. The form is **required to be submitted at least monthly** and is to include the names of donors, complete address and gift amount.
- † Mail, email (csleblanc@diolaf.org or fax (337-261-5645) the completed **Gift Reporting Form or Church Office (Batch) Report** to the **Office of Stewardship and Development**.
- † Checks received and **made payable to the Diocese of Lafayette or Bishop's Services Appeal** are collected, along with **corresponding parish envelopes** and mailed (or delivered) to the **Office of Stewardship and Development**.

BSA PLEDGE ENVELOPES:

- † Bishop's Services Appeal (BSA) pledge envelopes received in the parish offertory are collected, and mailed (or delivered) **unopened** to the **Office of Stewardship and Development**.

SECOND COLLECTION AND/OR PLEDGE PAYMENTS:

As donors continue to fulfill their BSA pledges, payments should be sent directly to the Diocese of Lafayette BSA office. All gifts and pledges will be acknowledged by the BSA office. **Should the parish receive a pledge payment, the following steps should be taken:**

- Complete a separate Gift Reporting Form
- For checks made payable to the parish, or any cash received, the parish needs to deposit these payments into the parish account and facilitate the writing of a check from the parish to "Bishop's Services Appeal" to be mailed to Diocese along with pledge cards and copy of initial checks written to parish.
- When depositing cash or checks made payable to the parish, please use the PDS Liability Account #251100.



MAIL all completed forms with pledge cards and checks to:

**Office of Stewardship and Development
Bishop's Services Appeal
1408 Carmel Drive
Lafayette, Louisiana 70501**

***Gift Reporting Form* is located on page 21.**

