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 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.