



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

This includes the following tasks:

- Collect all completed pledge cards and any initial payment checks; verify all checks are signed, dated and made payable to “Bishop’s Services Appeal”.
- Collect envelopes and/or cash for the BSA provided in the second collection during the year. Remit at least once a month (weekly preferred) to the Office of Stewardship per the more detailed instructions below.
- Prepare the Gift Reporting Form each month (weekly preferred), accompanied with submitted payments. It is important to stay timely on this as donors expect prompt acknowledgment from the Office of Stewardship and Development.
- Mail reports with payments to the Diocese each month
 - **NOTE: Any report received without payments will be returned to Parish office, to be re-submitted with appropriate payments.**
 - **All parish or donor payments received after January 10, 2021 will apply to the 2021 BSA totals.**
- 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 is 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 is used for direct mailing back to the Diocese for 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 any initial first payments on pledges. See form image on page 36.

DETAILS FOR PROCESSING GIFTS

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 unopened (or delivered) to the Office of Stewardship and Development on a weekly basis.

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 BSA Gift Reporting form is required to be submitted at least **monthly (weekly preferred)**, and is to include the names of donors, complete address and gift amount. Copies of the checks and/or parish envelope may replace detailed listing and attached to the report with your remittance.
- † 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 (weekly preferred)** and is to include the names of donors, complete address and gift amount. Copies of the parish envelope may replace detailed listing on form and attached to the report with your remittance.



- † 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 made out to the BSA.
- † Parish bookkeeper is not required to enter checks payable to the BSA 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 (weekly preferred)** and is to include the names of donors, complete address and gift amount. Making a copy of the donor's check may replace the detailed listing on the Gift Reporting Form.
- † 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 in a parish envelope and made payable to the Diocese of Lafayette or Bishop's Services Appeal are matched with the person's corresponding parish envelope and both pieces are mailed (or delivered) to the Office of Stewardship and Development.

MAIL all completed forms with pledge cards and checks to The Office of Stewardship and Development, attention Bishop's Services Appeal. Call 337-261-5641 with any questions.



GIFT REPORTING FORM

ATTN: Office of Stewardship and Development	Date: _____
1408 Carmel Drive	
Lafayette, Louisiana 70501	Parish #: _____
Email: csleblanc@diolaf.org / Fax No.: (337) 261-5645	

**Please submit completed form WITH PAYMENTS to the Office of Stewardship and Development monthly.*

PARISH: _____
ADDRESS: _____
CITY: _____
PHONE: _____ PREPARED BY: _____



PLEASE LIST ALL BSA GIFTS REMITTED DIRECTLY TO PARISH AND RECEIVED BY CASH, CHECK, OR ONLINE:

FULL NAME OF DONOR (Last, First)	ADDRESS	CITY	ST	DONOR CHECK #	GIFT AMOUNT
					\$
					\$
					\$
					\$
					\$
					\$
					\$
					\$
					\$
					\$
					\$
					\$
					\$
					\$
				LOOSE CASH (Not identifiable):	\$ _____
				TOTAL AMOUNT OF PARISH CHECK (Please attach):	\$ _____