

P u r p o s e

The Purpose of the Gift Processing Procedures is to assist the parish staff and the Office of Stewardship and Development staff in proactively reviewing and recording all gifts and/or pledges made to the Annual Catholic Appeal and Special Collections. By following effective gift audit and recording steps, we can properly credit every donor's contribution. This will help foster a spirit of partnership among donors, parish staff members and the Office of Stewardship and Development for funding the work of the local and universal church.

Annual Catholic Appeal (ACA) Gift Processing Procedures

Case for Support:

The Annual Catholic Appeal is an opportunity for the Catholic Community in the Diocese of Sacramento to come together and make a difference for tens of thousands of people in need within our communities. Together, we greatly improve the lives of our brothers and sisters in need by funding more than 100 social service programs, supporting seminarians who will return to serve our diocese, and providing for new parishes in growing areas. As in the past, 25 percent of the proceeds from the Annual Catholic Appeal will go back to your parish for your own outreach to those in need.

Materials:

By January 2009, parishes will receive the Appeal promotional and operative materials, including brochures, video, audio, bulletin information, pledge envelopes, pencils, gift processing instructions and parish transmittal forms and cards. **The Appeal Commitment Weekend will be February 21-22, 2009.**

The following are the procedures we ask parishes to follow when handling and returning Annual Catholic Appeal monies:

Step 1: Have the following materials ready prior to processing the ACA contributions:

- Parish Transmittal Forms
- Transmittal Control Cards
- Adding machine with tape
- Rubber bands
- Pledge envelopes and donor contributions

Step 2: Verify contents and sort the gift envelopes according to the following gift types:

- Pledges
- Pledges and one-time gifts containing cash with donor information
- One-time gifts of check, direct debit and credit card with donor information
- One-time gifts of cash without donor information

Step 3: Audit donor envelopes containing cash:

- Gift envelopes with information ó *The amount of cash should correspond with what is written on the envelope.*
- Gift envelopes without information ó *The total amount of cash from these envelopes will be noted as anonymous gifts on the parish check.*

- Gift envelopes containing cash and check *ó* *Indicate the amount of cash and the amount of the check on the envelope. Please include the **amount of the check** with the total loose checks and **the amount of the cash** under the cash covered by parish check. This envelope (with check enclosed) should be kept with other cash envelopes covered by parish check.*

Step 4: Prepare a parish check to cover the cash donations.

- The parish check should be made payable to the *Annual Catholic Appeal* or *ACA*. On the check stub, please indicate the total amount of loose cash and anonymous gifts. *Please **do not** combine ACA contributions with any other collection on the parish check.*

Step 5: Prepare Transmittal Control Cards. Run a tape for each of the following:

- Total amount of pledges
- Total amount of one-time gifts
- Total amount of loose checks
- Parish check should include amount of loose cash, anonymous gifts, and cash payments (*please enclose ALL empty envelopes covered by the parish check*)
- Complete all transmittal control cards and attach to corresponding gifts.

Step 6: Prepare Parish Transmittal Forms:

- Assign a number for each Parish Transmittal Form submitted
- Make sure all Transmittal Control Card totals correspond to the respective Parish Transmittal Form submitted
- Retain a copy of the Parish Transmittal Form for your parish records.

Step 7: Please send the completed package via FedEx using the pre-paid, pre-printed shipping form(s) provided. You may schedule a FedEx pick up by calling 1-800-463-3339.

Diocese of Sacramento
2110 Broadway
Sacramento, CA 95818
(916) 733-0266

Step 8: For any questions regarding processing gifts please, call 916-733-0266 or email us at aca@diocese-sacramento.org.

Thank you!

Special Collections Gift Processing Procedures

Special Collections are scheduled during the year to communicate and support the particular needs of the national and universal church. For this reason, all parishes throughout the diocese are asked to participate in nine (9) Special Collections throughout the year on designated weekends (see list below). One month prior to each Special Collection, the pastor (parish) will receive information to help promote the upcoming collection in the bulletin and from the pulpit.

2009

January	<i>No Special Collection</i>
February	<i>No Special Collection</i> (Annual Catholic Appeal Commitment Sunday ó February 22)
March 22	Catholic Relief Services (shared w/Church in Central & Eastern Europe)
April 26	Catholic Home Missions (shared w/Black & Native American Missions)
May 24	Church in Latin America
June 28	Peterø Pence (Collection for the Good Works of Our Holy Father)
July	No Special Collection
August 9	Catholic Communication Campaign
September 13	Diocesan Collection for Priests Retirement
October 18	World Mission Sunday
November 22	Catholic Campaign for Human Development
December 13	Retirement Fund for the Religious (Religious Institutes)

The following are the procedures we ask parishes to follow when handling and returning Special Collection monies:

1. Count and deposit all cash and checks received.
2. Mail one parish check for the entire amount made payable to the Diocese of Sacramento with a notation on the check to identify the collection it represents.
3. Record all donor contributions at the parish.

For more information or assistance about the special collections, please call the Office of Stewardship and Development at 916-733-0266 or refer to the Diocesan Website at www.diocesesacramento.org/giving/specialcollections.html.

DIOCESE OF SACRAMENTO

Annual Catholic Appeal

Parish Transmittal Form

Report No.: _____

Date: _____

Parish Name: _____

City: _____

Contact Person: _____

Telephone: () _____

Non-Cash Donations				
Gift Type		Envelopes/ Loose Checks # Counts	Total Pledge Amount	Total One-Time Gift Amounts
Pledges			\$	
One-time gifts	With envelopes			\$
	Loose checks			\$
Total		#	\$	\$

Cash Donations				
(Please provide a parish check made out to Annual Catholic Appeal or ACA for all cash donations received.)				
Gift Type		Envelope # Counts	Amounts	Parish Check
Envelopes with donor information			\$	
Anonymous donors	Envelopes without donor information		\$	
	Loose cash		\$	
Total		#	\$	\$

FOR OSD OFFICE USE	
Audited By: _____	
Date: _____	Batch #: _____
Comments: _____	

Report Submitted By: _____

Parish Auditor or Other Authorized Signature

Annual Catholic Appeal Transmittal Control Card

Pledges

Parish Name/City _____

_____ Pledge Envelopes

Total Amount Pledges..... \$ _____

Report No. _____ Date _____ Parish Auditor Initials _____



Annual Catholic Appeal Transmittal Control Card

One-Time Gifts (Non-Cash)

Parish Name/City _____

_____ Envelopes – Total Amount One-Time Gifts \$ _____

_____ Loose Checks – Total Amount Loose Checks.....\$ _____

Report No. _____ Date _____ Parish Auditor Initials _____



Annual Catholic Appeal Transmittal Control Card

Cash Gifts

Parish Name/City _____

_____ Envelopes with Donor Information

_____ Envelopes without Donor Information

_____ Total of Empty Envelopes Covered by Parish check

Total Cash Payments/Cash One-Time Gifts\$ _____

Total Loose Cash.....\$ _____

Total Amount Anonymous Gifts (envelopes without donor information) \$ _____

Parish Check Amount\$ _____

Report No. _____ Date _____ Parish Auditor Initials _____