

GIFT REPORTING PROCEDURES

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 are collected, and mailed (or delivered) 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 software.

CHECKS MADE PAYABLE TO PARISH:

- † Checks received and made payable to parish are to be deposited in **Liability Account #251100**.
- † A parish check is then remitted to the Diocese of Lafayette along with a completed **Gift Reporting Form** or **Parish Data System (PDS) Church Office (Batch) Report**. The form or report is **required to be submitted monthly**, and is to include the names of donors, complete address, and gift amount.
- † Mail or fax 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 **Liability Account #251100**.
- † A parish check is then remitted to the Diocese of Lafayette along with a completed **Gift Reporting Form** or **Parish Data System (PDS) Church Office (Batch) Report**. The form or report is **required to be submitted monthly**, and is to include the names of donors, complete address, and gift amount.
- † Mail or fax the completed **Gift Reporting Form** or **Church Office (Batch) Report** to the **Office of Stewardship and Development**.

ONLINE GIVING DESIGNATED FOR BSA:

- † Online gifts received and designated for the Bishop's Services Appeal (BSA) are to be deposited in **Liability Account #251100**.
- † A parish check is then remitted to the Diocese of Lafayette along with a completed **Gift Reporting Form** or **Parish Data System (PDS) Church**



Office (Batch) Report. The form or report is **required to be submitted monthly**, and is to include the names of donors, complete address, and gift amount.

- † Mail or fax the completed **Gift Reporting Form** or **Church Office (Batch) Report** to the **Office of Stewardship and Development**.

PARISH ENVELOPE SYSTEM:

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

BSA PLEDGE ENVELOPES:

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

***Gift Reporting Form* is located on page 19.**



TO BE NOTED

- † Please make every effort to follow the reporting procedures as they have been outlined.
- † Please coordinate reporting procedures with parish bookkeeper and money counters (if applicable) to ensure proper adherence of procedures.
- † Parishes are asked to provide annual census and/or submit monthly census updates to the **Office of Stewardship and Development**.
- † The **Office of Stewardship and Development** is to be **notified promptly each month** (by Gift Reporting Form or PDS Church Office (Batch) Report) of all gifts received directly by the parish. This is **required** to make certain that **all gifts** to the Bishop's Services Appeal are **recorded properly**, and **donors are acknowledged in a timely manner**.
- † The **Office of Stewardship and Development** provides monthly pledge payment reminders to donors.
- † The **Office of Stewardship and Development** provides monthly Appeal reports to Parish Clergy, Parish Staff, and Parish Coordinators.
- † The **Office of Stewardship and Development** provides charitable contribution letters to donors for tax purposes.
- † The **Office of Financial Affairs** administers accounting for the Bishop's Services Appeal (BSA).

**PLEASE CONTACT THE
OFFICE OF STEWARDSHIP AND DEVELOPMENT
WITH ANY QUESTIONS OR CONCERNS.**

CALL US AT (337) 261-5641

