

**ANNUAL CATHOLIC APPEAL**

**GIFT PROCESSING PROCEDURES**

The purpose of the gift processing procedures is to assist parish staff and The Catholic Foundation team in proactively reviewing and recording all contributions made to the Annual Catholic Appeal (ACA).

**Please follow the following gift audit and recording steps so that we can:**

* properly credit every donor
* accurately report the level of participation in your parish

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| **Important Points to Remember when Auditing Gifts**1. Checks should remain in the envelopes (**DO NOT DEPOSIT CHECKS**).
2. **ALL CASH** needs to be removed from envelopes, write the amount of cash on the outside of each envelope.
3. Return all contribution envelopes with donor information to The Catholic Foundation.
4. Deposit **ALL CASH** and prepare a parish check to cover the envelopes and loose cash.
5. Do not record gifts at the parish, The Catholic Foundation will process, record, and mail correspondence (thank you letter, pledge statements, tax letter) for each contribution.
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**Processing Instructions**

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

* Parish Transmittal Form
* Adding machine with tape
* Rubber bands
* Contribution envelopes
* Gift type labels for sorted envelopes

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

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| **Pledge and Recurring Gift Envelopes:*** w/ Checks
* w/ Credit cards
* w/ Direct debit
* w/ Cash payments
* w/o Payments
 | **One-Time Gifts:*** w/ Checks
* w/ Credit cards
* w/ Direct debit
* Loose checks
 | **Cash Gifts:*** Envelopes with donor information
* Anonymous envelopes
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 **Step 3: 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 COLLECTIONS.

**Step 4: Prepare Parish Transmittal Form:**

* Retain a copy of the Parish Transmittal Form for your records.

**Step 5: Please send the completed package using the FedEx envelope provided OR a box that fits the collection. The Catholic Foundation will pay for shipping. Preprinted FedEx labels are provided for your use:**

Annual Catholic Appeal

Diocese of Sacramento

2110 Broadway

Sacramento, CA 95818

**Step 6: For any questions regarding processing gifts please call
916-733-0266 or Email:** **aca@scd.org**

**ANNUAL CATHOLIC APPEAL TRANSMITTAL FORM**

Report No.: \_\_\_\_\_\_of\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Parish Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Person: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Telephone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| PLEDGES and RECURRING GIFTS |
| #\_\_\_\_\_\_\_\_\_\_ Envelopes with checks#\_\_\_\_\_\_\_\_\_\_ Envelopes with credit cards#\_\_\_\_\_\_\_\_\_\_ Envelopes with direct debit payments#\_\_\_\_\_\_\_\_\_\_ Envelopes with cash payments (Cash: $\_\_\_\_\_\_\_\_\_\_\_\_)#\_\_\_\_\_\_\_\_\_\_ Envelopes without payments |
| ONE-TIME GIFTS |
| **Checks, Credit Cards and Direct Debit Gifts** |
| #\_\_\_\_\_\_\_\_\_\_ Envelopes with checks#\_\_\_\_\_\_\_\_\_\_ Envelopes with credit cards#\_\_\_\_\_\_\_\_\_\_ Envelopes with direct debit#\_\_\_\_\_\_\_\_\_\_ Loose checks |
| **Cash Gifts** |
| #\_\_\_\_\_\_\_\_\_\_ Envelopes with donor information Total $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (The donor name and address are known.) #\_\_\_\_\_\_\_\_\_\_ Anonymous envelopes Total $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Donor information not known.)  Cash gifts without envelopes Total $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**Parish Check Amount: $**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Important: Please deposit cash into your parish bank account and
make a check payable to “ACA” for the amount.

Mail the check and all donation envelopes to:
Annual Catholic Appeal, 2110 Broadway, Sacramento, CA 95818.

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| Report submitted by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Audited by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Parish Auditor Foundation Staff |

 **Questions? Call 916-733-0266 or email** **aca@scd.org****.**

**Labels for separated group bundles**
(use each page folded in half to bundle each type of gift)

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| Pledge and Recurring Gift Envelopesw/ checks |

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(use each page folded in half to bundle each type of gift)

|  |
| --- |
| Pledge and Recurring Gift Envelopesw/ credit cards |

**Labels for separated group bundles**
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|  |
| --- |
| Pledge and Recurring Gift Envelopesw/ direct debit payments |

**Labels for separated group bundles**
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|  |
| --- |
| Pledge and Recurring Gift Envelopesw/ cash payments |

**Labels for separated group bundles**
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|  |
| --- |
| Pledge and Recurring Gift Envelopeswithout payments |

**Labels for separated group bundles**
(use each page folded in half to bundle each type of gift)

|  |
| --- |
| One-Time Gift Envelopesw/ checks |

**Labels for separated group bundles**
(use each page folded in half to bundle each type of gift)

|  |
| --- |
| One-Time Gift Envelopesw/ credit cards |

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|  |
| --- |
| One-Time Gift Envelopesw/ direct debit payments |

**Labels for separated group bundles**
(use each page folded in half to bundle each type of gift)

|  |
| --- |
| Loose checks |

**Labels for separated group bundles**
(use each page folded in half to bundle each type of gift)

|  |
| --- |
| Cash Gift Envelopesw/ donor information |

**Labels for separated group bundles**
(use each page folded in half to bundle each type of gift)

|  |
| --- |
| Cash Gift Envelopeswithout donor information |