

5. Gift Processing & Publishing of Parish Results

Gift Processing Overview

Purpose

This gift processing procedure is designed to ensure easy and accurate recording of every gift that comes in from your parish. The instructions below provide a step-by-step guide to quick and easy remittance of all Appeal materials you receive.

As gifts from your parish are recorded, both those that you forward from the parish and those that are mailed directly to us from your parishioners, TCF will be updating our reporting process daily.

Instructions for retrieving 1) your parish's daily results and 2) your parish donor and LYBUNT lists are available on the inside cover of this Guide.

Of course, if at any time your parish requires further information or help accessing the above resources, please feel free to contact Tim Regele at tregele@rcab.org or 617-779-3709.

Description

- Please follow the correct Procedures for Processing Gifts on the next page.
- Credit Cards are processed on the monthly anniversary of day the initial pledges are entered into our system. This affects the timing of the transactions booked on a parishioner's credit card and the timing of when these gifts show on reports of your parish totals.
- Stock gifts often take a little bit longer than cash/check gifts to be reflected on parish reports.
- There will be a Monthly Appeal results mailing from The Catholic Foundation. We can deliver your reports via mail, email or fax. You can also request additional parish information from TCF at any time.

Procedures for Processing Gifts and Pledges

We greatly appreciate all of the hard work you do for The Catholic Appeal. Please follow the procedures outlined below so we can record and acknowledge all gifts received from your parish promptly. Thank you!

Receiving Gifts: The 4 Types of Envelopes You May Receive

1) Loose Coins and Cash:

- Please count all *loose coins and cash* received and deposit into your parish account.
- Please write a check from your parish account made out to the Catholic Appeal for the corresponding amount.
- Please put the parish check with all other checks received without envelopes.

2) Checks without envelopes:

- Please put all loose checks together (checks that are not received in sealed envelopes) and include your parish check.
- Please write or stamp your parish number on the front of all loose checks to ensure all gifts from your parish are accurately credited to your parish.
- Please bind all loose checks with a rubber band and place in bank bag.

3) Sealed Envelopes:

- Please do not open sealed envelopes.
- Please write or stamp your parish number on the outside of each envelope to ensure all pledges and gifts are accurately credited to your parish.
- Please bind sealed envelopes with a rubber band and put in bank bag.

4) Completed Pledge Forms:

- You may receive some in-home pledge forms without an envelope.
- Please bind completed pledge forms that come without an envelope with a rubber band and place in bank bag.

Preparing Bank Bags

1. Please confirm all items are in bank bag.
2. Please seal the bank bag(s).
3. Please write your parish name and parish number on the outside of the bank bag.
4. Please place the sealed bank bag(s) in the prepared FedEx Pak(s).

Preparing FedEx Bags:

1. The FedEx Airbills have been filled out for your parish for the first 2 weeks of the Appeal. You can schedule FedEx pickups for either the same day or the next business day. Paks must be ready when FedEx arrives.
2. To set up Federal Express pick-up: Call (800) 463-3339 and give the 2010 Catholic Appeal 9 digit account #2255-3308-3. This number is also on your FedEx Airbill.
3. Your 2010 Catholic Appeal Weekend gifts will be going directly to Datamatix, Inc., our lockbox services provider.

Datamatix, Inc.

125 Walnut Street, Suite #115

Watertown, MA 02472

Phone: (617) 924-5555

4. Tear off the top sheet of the FedEx Airbill (Sender's Copy) and retain for your records.
5. Please set up your FedEx pickups for Monday or Tuesday following Catholic Appeal Weekend. This will allow the Gift Processing Department enough time to report the number of donors and dollars raised in your parish to you by the end of the week.

As always, please feel free to contact Domenico Bettinelli, Gift Processing Manager, at 617-779-3708 or dbettinelli@rcab.org with any questions. We look forward to working with you this year. Thank you.