



## **For Appeal Secretaries: How to Process a Pledge Form**

In order to make processing easier for the parishes and the Diocesan Appeal Office staff, there are a few suggested steps on processing the gifts.

1. Before you separate the pledge forms from the envelopes, make sure that all information on the pledge form corresponds and is correct and completely filled in. (Name, address, parish, check, etc.) This information is crucial for the correcting processing of the gifts. For any parishioners that are new, kindly print the word NEW at the top of the pledge form.
2. Alphabetize and record pledges and payments on the transmittal form. Please keep each pledge card and its payment(s) together.
3. Make sure that the total "Payment Enclosed" on the Transmittal Form and the cheque total agree.
4. Complete and mail the transmittal form, pledge forms and payments each week during and for a short time after the active portion of the appeal.
5. Deposit all cash received at the parish and send a parish cheque to cover it.
6. Please report your weekly totals to the Appeal Office by Tuesday. This information will be used in the Appeal Newsletters that will be produced weekly during the active period of the Appeal. This should be inserted into your weekly parish bulletin.

### **Other Helpful Hints:**

- If you cannot read the handwriting, neither can we. Please print with pen or use a label.
- When in doubt about any information on a pledge form or if the pledge is not complete, contact the parishioner before sending the pledge to the Appeal Office. We cannot process an incomplete pledge.
- If your weekly records do not seem to match what the Appeal Weekly Update is showing, contact the Appeal Office at 250-964-4424 ext 227. Remember, we can only process completed pledges, there might be electronic gifts that has not been processed or we may have received a pledge directly from a donor, etc.



### **Things to Remember When Processing a Pledge Form**

When you receive a pledge form, please be sure the following entries are CLEARLY AND LEGIBLY WRITTEN ON THE FORM.

TOTAL INITIAL DOWN. This is the amount paid and submitted with the pledge form. The "initial down" can be a cheque, cash (to be put in the form of a transfer cheque) or money order.

TOTAL AMOUNT OF PLEDGED GIFTS. This is the total pledged for this year's appeal. This is the total commitment *including* the initial down. For example, if a person pledges \$250 and includes \$25 with the pledge form. The total initial down is \$25 and the total amount pledged is \$250.

For parishioners who are new to the parish, please make sure all the contact information, *and parish*, is on the pledge card and indicate that it is a "NEW" parishioner on the pledge form.

A PLEDGE FORM MUST BE ACCOMPANIED WITH EVERY GIFT. If a parishioner sends a cheque, money order or cash with the envelope, please fill out a pledge form for them. If it is an anonymous gift of cash, please indicate on the transmittal form that there is an anonymous gift of "dollar amount" included.

*\*PLEASE DO NOT SEND US CASH. Cash should be deposited in your parish account and an exchange cheque should be forwarded with the corresponding transmittal form.*

### **Parish Records**

Pledge cards and transmittal forms are to be retained for 2 years

All other records should be kept until the current appeal year is finalized.

Please be sure to shred anything that has parishioners' personal information on it.