

THE ROLE OF THE SECRETARY

As Appeal Secretary, you will play an important role in the management and control of the gifts received from your fellow parishioners. You will also serve as a vital communication link between your parish and the Development Office. The information contained in this section is here to help you clarify and simplify your responsibilities.

Each week, please complete the Annual Catholic Appeal forms (found on pages 17 & 18) and mail, along with the pledge cards and one parish check for the total amount paid made out to *Annual Catholic Appeal*, to Daisy Perez at the Development Office. Please note the following:

- Please **differentiate payments received in calendar year 2020** from those received in **calendar year 2021**, including completing separate reports and submitting separate checks. This will help to ensure that donations are receipted for the proper calendar year, and to prevent any confusion. Please see Page 20 for more information.
- **Alphabetize the pledge cards.** The pledge cards and the names written/typed on the **Donor List** MUST BOTH be in alphabetical order.
- Place the appropriate parishioner **label** (provided by the Development Office) on the pledge card, unless the card is already pre-printed, including a Diocesan account number.
- **Correct names and addresses** if needed. Ensure that titles such as Mr., Mrs., Mr. & Mrs., Ms., Rev., are correctly shown on the card.
- **Verify the Amount Enclosed** with the check or cash submitted by circling the amount on the “Amount Enclosed” line on the pledge card or putting a check mark next to it. This procedure will serve as a check and balance so the amounts on the reporting forms will equal the cash and check totals that will be deposited into the Parish checking account. **If there is no payment enclosed**, make sure a **zero** is written on the “Amount Enclosed” line on the pledge card.
- Transfer the information from the pledge card to the appropriate column on the Donor List form.
- Please fill in the **electronic* Parish Report Transmittal Form**. It is important to list any payments on prior 2021 pledges under line #4 with the account number (if known), name, and amount of payment. Line #4 is for recording a payment made on a pledge that was recorded earlier in the 2020 Campaign. Any late payments submitted from a prior year’s ACA campaign will be processed as a new pledge and payment for 2021. *Filling out electronically when possible or make sure to write each name legibly.
- Once the forms are completed, please **make a copy** of them for your records and mail the originals to the Development Office, along with the pledge cards and **ONE parish check** by Thursday of each week during the Appeal. You will deposit the individual payments into the parish account, and the amount of the parish check you submit to the Diocese should equal the amount that you deposit into the parish account. **Please double-check that these are equal and that the math on your ACA forms is correct.**

We thank you in advance for your important work on the 2021 Annual Catholic Appeal. If you have any questions or need any help, please contact Alma Benitez, Director of Stewardship & Development, at (509) 965-7117 or alma.benitez@yakimadiocese.net or Susi, ACA Bookkeeper, at (509) 965-7117 or Susana.Figueroa@yakimadiocese.net.

2021 ANNUAL CATHOLIC APPEAL

Donor List

Parish: **SAMPLE PARISH**

City **YAKIMA**

Donor Name	ID#	Pledge	Check	Cash	CC/ EFT (✓)
1.		\$	\$	\$	<input type="checkbox"/>
2.		\$	\$	\$	<input type="checkbox"/>
3.		\$	\$	\$	<input type="checkbox"/>
4.		\$	\$	\$	<input type="checkbox"/>
5.		\$	\$	\$	<input type="checkbox"/>
6.		\$	\$	\$	<input type="checkbox"/>
7.		\$	\$	\$	<input type="checkbox"/>
8.		\$	\$	\$	<input type="checkbox"/>
9.		\$	\$	\$	<input type="checkbox"/>
10.		\$	\$	\$	<input type="checkbox"/>
11.		\$	\$	\$	<input type="checkbox"/>
12.		\$	\$	\$	<input type="checkbox"/>
13.		\$	\$	\$	<input type="checkbox"/>
14.		\$	\$	\$	<input type="checkbox"/>
15.		\$	\$	\$	<input type="checkbox"/>
16.		\$	\$	\$	<input type="checkbox"/>
17.		\$	\$	\$	<input type="checkbox"/>
18.		\$	\$	\$	<input type="checkbox"/>
19.		\$	\$	\$	<input type="checkbox"/>
20.		\$	\$	\$	<input type="checkbox"/>
Totals		\$ B	\$ C	\$ D	E

Alphabetize the pledge cards. The pledge cards and the names written/typed on the **Donor List** **MUST BOTH** be in alphabetical

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Rules for Tax Receipting

Please remember that the parishes *do not* include the Annual Catholic Appeal on their tax statements to parishioners. Since parishioners who make monthly payments send those to the Diocese rather than the parish, it is best if their total ACA donation is receipted by the Diocese only. This will hopefully help avoid confusion so the donor does not accidentally *doubly* deduct a donation.

For the Annual Catholic Appeal, there is inevitably a lag time between the when the donor gives their donation to the parish and when that donation arrives at the Stewardship & Development Office. It is very important to note dates of when a gift is given. The year that we give the receipt is determined by when the donor hands over the money. It is *not* determined by the date written on the check.

Please carefully review the following examples:

1. The donor writes out a check on December 31, 2020, and gives it to the parish that same day. The parish does not deposit the check until January 2, 2021. This donation would go towards the 2021 tax receipt because the money was actually given by the donor in December.
2. The donor writes out a check on December 31, 2020, and gives the check to the parish in the collection basket at Mass on January 1, 2021. This donation would go towards the 2020 tax receipt because the money was actually given in January.
3. The donor writes a check dated December 31, 2020, and mails it to the parish. The postmark on the envelope shows the USPS canceled the stamp on December 31st even though it does not arrive at the parish until January 2, 2021. This donation would go towards the 2020 tax receipt because the money was actually given in December. (Advised to keep the envelope as proof of the date.)
4. The donor writes a check dated December 31, 2020, and mails it to the parish. The postmark on the envelope shows the USPS canceled the stamp on January 2nd. This donation would go towards the 2020 tax receipt because the money was actually given in January. (Advised to keep the envelope as proof of the date.)
5. A donor fills out a pledge card on December 31, 2020, asking to make a credit card donation. The pledge card is not forwarded to the Diocese until January 2nd when it is charged. This donation would go towards the 2020 tax receipt because credit card must be charged in the year the donation is receipted. (Advised to call the Diocese if there is any doubt a credit card pledge will not arrive in our office prior to Dec. 31st.)

I highly recommend for any gift that comes in the collection basket or is handed to the office in person, that the parish office writes the actual date the gift was received on the envelope because that will determine what year the donation counts towards and will make it easier for you to sort when you make out the ACA reports. Donations that come through the mail can be sorted by the postmark.