

# St Vincent DePaul Rockford Council

## Conference Process for handling St. Vincent de Paul Society Donations

Our SVDP Conferences have introduced Vincentian envelopes that are collected at the weekend Masses and online donations to SVDP via the parish. The parishes have adopted a few different methods of processing these donations intended for the Society. While these different methods may have some merit, the Diocese of Rockford wishes to standardize a process utilizing best practices while aligning the parish process with the responsibilities of the SVdP conference treasurer where possible.

On October 18, 2019, Rockford Council members Susan Wiland, President, Steve Jerger, VP, and Cindy Jerger Treasurer met with the Diocese of Rockford, Don Borusch, Internal Audit, and Jodi Rippon, Director of Finance. The objective of this meeting was to understand the diocesan concerns of SVDP envelope and online collections, the impact to SVDP and to agree to one common process for both parishes and conferences.

### Parish Process Recap

The Diocese of Rockford developed a document for handling St. Vincent de Paul donations in November 2019. The following summarizes the main points concerning SVdP. The complete document is included in the Attachments section at the end of this document.

- When the collection (including SVdP envelopes) is counted, counting teams should segregate the SVdP envelopes (as well as any loose checks where St. Vincent de Paul is the payee) and should not open or count them.
- The SVdP envelopes and loose checks written payable to SVdP should be placed in a tamper-evident bag and picked up (not mailed since there may be cash in the envelopes) by the parish conference SVdP treasurer or designated volunteer on a regular basis (weekly is preferred). The tamper-evident bag will be kept in a locked safe or cabinet until picked up.
- Donation checks payable to the parish that combine parish contributions and SVdP donations should be deposited by the parish and the amount intended for SVdP should be processed in the same manner as online giving below. Ensure that donor information and donor's SVdP gift amount is forwarded to SVdP for tracking.
- Any checks intended for SVdP that are payable to the parish should be deposited into the parish account and the amount processed the same as online giving below. Forward a copy of the donor's check to SVdP with the funds.
- Online giving transactions earmarked for St. Vincent de Paul have been deposited into the parish account. The SVdP donations are posted to a special SVdP general ledger account. A parish check for the total SVdP amount collected for the period is issued and delivered to the SVdP Conference. (The parish and conference can determine the best method of delivery.) In addition, the parish provides a report of SVdP contributions made for the period including each donor name and address, date of donation, and amount.

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## Overview

- The best method for soliciting parishioner gifts for SVdP is through the use of a special envelope included with the envelope packet sent to registered parishioners. This method is highly encouraged over a general second collection for the Society. This document addresses parishes that use this method.
- Parishes and conferences should collaborate to educate parishioners to write SVdP donation checks payable to “St. Vincent de Paul Society” and NOT to the parish. Some parishes use a bulletin article to help accomplish this goal: see Attachments. Others may include payee information on the special envelope. (When printing the SVdP envelopes an instruction on the outside of the envelope to “Make checks payable to SVDP Conference Name” should be noted.) Other methods may also be helpful.
- Whenever possible, parish funds should be kept segregated from SVdP funds. There are three scenarios in which the parish must deposit SVdP funds into the parish account on their behalf:
  - Checks made payable to the parish that include funds for both the parish and SVdP.
  - Checks made payable to the parish with SVdP on the memo line, intended solely for SVdP (educate donors to write checks payable to SVdP)
  - Online giving deposited to the parish but intended for SVdP

## SVdP Conference Process

The following procedures were developed to standardize the collection, recording and reporting process. It is strongly recommended that conferences and parishes implement and adhere to the procedures. There may be instances where conferences and parishes find alternative procedures that remain compliant with the diocese’s requirements. The Conference president should be consulted in these instances.

### Collection Team (CT) for Weekly Collections

- The CT should consist of at least two members. One of the members must be a Vincentian.
- Confidentiality is highly emphasized within the Society. **It is the responsibility of the Collection Team to keep the donor information secure and private.**
- The CT should coordinate pickup of the SVdP collection/donations envelope from the parish. Confirm envelope is sealed.
- The CT should open the sealed envelope and inspect envelopes for checks written payable to the parish. Any checks payable to the parish should be removed. Two copies of the check should be made. One of the copies along with the check should be given to the parish staff member to be managed according to the Parish Process outlined above. The other copy of the check will be taken by the CT.
- The CT should count the collection/donations at the parish office. Using the Collection Register (see attachment) record the cash, checks payable to SVdP, checks payable to the parish (photocopied by CT) and the total collection amount.
- Put the envelopes with the cash, checks, photocopies and the Collection Register into a sealed envelope to be delivered to or picked up by the Conference Treasurer.

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## SVdP Conference Process (continued)

### Conference Treasurer and/or Appointed Member

*The following responsibilities may be performed by the treasurer or may be shared with a Conference member who is appointed by the Conference president.*

- Weekly collections:
  1. Get the sealed envelope processed by the Collection Team
    - a. pick up from the parish office
    - b. have the CT hand deliver to the conference treasurer
  2. Confirm envelope is sealed. Verify Collection Register agrees with the envelope contents.
  3. Checks that are payable to the parish must be returned to the parish office. (They should have been removed by the Collection Team). Only checks payable to SVdP should be deposited into the SVdP account. For checks written payable to the parish make two copies of the check. One of the copies along with the check should be given back to the parish and managed according to the Parish Process.
  4. Log donor contributions in the Donor Spreadsheet: see attachment. Checks that were copied (payable to the parish) need to be tracked as outstanding. When payment from the parish is received, they can be marked as such. Quickbooks users may choose not to use the Donor Spreadsheet and log donor info into Quickbooks when payment is received from the parish.
  5. Make deposit. Should agree with Collection Register's Cash and Check Total (A + B): see attachment.
- Online donations or checks payable to the parish intended for SVdP will be handled according to the Parish Process:
  1. The parish issues a check for these donations and includes a report with the supporting donor information: i.e. donor name and address, date of donation, amount.
  2. Use the parish's report to update Quickbooks or the Donor Spreadsheet. Record new donations and mark any outstanding ones as received. If there are any discrepancies between the parish's report and Quickbooks/ Donor Spreadsheet, communicate donor and/or contribution inconsistencies with the parish and reconcile.
  3. Make deposit.
- Donor Acknowledgement
  1. Send Thank You letters to donors recognizing the gift: see sample letter in Attachments. **This letter satisfies the IRS written acknowledgement requirement for contributions of \$250 or more.**
  2. If the donor requests a year-end donation statement, send a Gift Acknowledgement letter: see attachment. Depending on how donors are tracked in Quickbooks, users can run a Customer report or export Other Names to Excel to get the annual gift amount. Donor Spreadsheet users can sort and subtotal donations by name for the year.
  3. If acceptable to the donor the Thank You letter or year-end Gift Acknowledgement letter may be emailed.
  4. To save on postage the Conference and parish may agree to send year-end donor acknowledgements together. When the regular parish donor letters go out, the SVdP letter could be included. However, SVdP donors who wish to remain anonymous should be excluded. These letters should be sent directly from the Conference.

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## Attachments

- Parish Process for Handling SVdP Donations



SVDP Donation  
Process - 2019 - FINA

- Collection Register (CT)



Collection  
Register.pdf

- Donor Spreadsheet (Treasurer)

For conferences without Quickbooks the following spreadsheet can be used to maintain donor contributions.



SVDP Donors.xlsx

- Quickbooks donor recording and reporting instructions



Contributions using  
Other Names List.pdf



Contributions using  
Customer.pdf

- Sample Bulletin instructions for making checks payable to SVdP

The Society of St. Vincent de Paul, Rockford Council now has its own 501(c)3 determination from the IRS. As a result, we are now requesting that your check donations are made payable to St. Vincent de Paul, ***parish name***. Thank you for your understanding, but most importantly, for you continued generosity in assisting in our mission of service.

- Sample Thank You Letter



Donor Thank You -  
blank.docx

- Sample Year-end Gift Acknowledgement Letter



Donor Annual  
Acknowledgement - b