

Information Management of Parish Giving

The good management of all information concerning parish giving is vitally important. It goes directly to credibility and confidence. People are generally unwilling to give meaningfully to a nonprofit organization that gives the impression of poor management.

Good information management depends upon a number of factors:

- Clear lines of communication
- Specific tasks delegated to specific people, with ongoing managerial oversight
- Adequate software and hardware
- When necessary, sufficient training of office staff
- Defined policies concerning acknowledgements, how often and when statements will be mailed and setting an optimum goal for the “24 hour turnaround” (a gift is received, receipted, entered into the database and an acknowledgement generated and mailed within 24 hours)
- In most parish settings, one person accepts the responsibility for the timely entering of data, producing proper letters and generating reports

What data is customarily maintained?

- Accurate contact information on all friends and members of the parish – especially cell phones and email addresses
- Up to date and accurate record of financial commitments (stewardship, special campaigns, capital campaigns and estate commitments)
- Proper allocation of a gift to specific giving purpose (memorial, stewardship, special campaign, etc.)
- Timely and accurate confirmation letters to all who make commitments
- Timely and accurate pledge statements, ideally sent out quarterly
- “Special circumstances” noted on individual records
- A record of parishioner responses when called at the end of the year if the commitment has not been honored

Parish management must periodically review the performance of the information management person and regularly review information management procedures to ensure consistency, timeliness and accuracy.

Financial information is also very confidential and sensitive and should be password protected and available only on a need-to-know basis to the proper people.

Information should be backed up at least on a daily basis and kept at a secure location apart from the church offices.