

SFT F6

Receive and process donations



Overview

This standard is about receiving and processing donations. Fast and accurate processing of donations received is a key element of supporter care, and the creation and maintenance of accurate financial records is an essential administrative function in fundraising.

You will need to understand and be able to use the systems and processes your organisation has in place. Since much of the information will be sensitive in nature you will need to be accurate and maintain confidentiality.

This standard is appropriate for people new to fundraising and those supporting fundraising activities in your organisation.

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Performance criteria

You must be able to:

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| P1 | check and process incoming donations in line with organisational requirements |
| P2 | record data protection preferences in line with organisational and legal requirements |
| P3 | issue an appropriate acknowledgement/thank you in line with organisational requirements |
| P4 | maintain security and confidentiality at all times in line with organisational requirements |
| P5 | notify the relevant person if you encounter any difficulties or discrepancies, in line with organisational requirements |
| P6 | comply with legal requirements and codes of practice |
| P7 | seek feedback on your performance to help identify ways you can improve your practice |

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Knowledge and understanding

You need to know and understand:

Context specific

- K1 the types of incoming payment that are handled regularly by your organisation
- K2 your organisation's procedures for processing donations and how to use the relevant parts of your organisation's database
- K3 what documentation needs to be completed for each form of **gift**
- K4 how to access and update existing donor records
- K5 how to issue receipts/acknowledgements / thank you letters and what processes to follow in doing so
- K6 the types of discrepancies that may occur and who you should report them to
- K7 sources of information and advice within your organisation
- K8 your organisation's timescale standards
- K9 the importance of security and confidentiality of information and how to maintain these
- K10 the limits of your own authority and what steps to take if any action falls beyond this

Sector specific

You need to know and understand:

- K11 the impact of legislation and regulation on data amendment and donation processing and where to seek information regarding these issues
- K12 how tax-effective giving mechanisms function

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Additional Information

Glossary

A **gift** may be a donation, grant or bequest, given to support the work of a non-profit organisation.

External Links

The Institute of Fundraising's Code of Fundraising Practice and the International Statement of Ethical Principles in Fundraising should be read alongside this NOS.

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