

# Not-for-Profit Donations Processing

## 10 tips to streamline your processing

### ✔ **MAKE SURE YOUR DONATIONS ARE PROCESSED SECURELY**

Continued fundraising success relies on donor trust, so donors need to know their funds are being handled securely. There are strict guidelines on how that can be done – especially when collecting credit card information, ensure you comply with PCI Security Standards.

### ✔ **HAVE A PLAN FOR EVERY STEP OF THE DONATION PROCESSING LIFECYCLE**

Make sure your team has a thorough understanding of what your process is for each part of the donations lifecycle, as errors at any point in this journey can delay the provision of frontline services. Steps in this journey include:

- Receiving and batching of all mail donations
- Clean data entry of donor information
- Processing donation payments
- Banking of all donations funds
- Providing banking reconciliation reports
- Donations trend reporting
- Merging, printing, and sending out receipts to donors in a timely manner
- Return to sender processing
- Reconciliation with donor data management system

### ✔ **EMPLOY A FLEXIBLE, RESPONSIVE PROCESSING TEAM**

Consider how your donations processing team can respond to your beneficiaries' needs, your donors' life changes, and upheavals in the world around you. A team that can grow and shrink as needed without excessive training costs will save critical funds and get frontline services to beneficiaries faster.

### ✔ **OPTIMISE YOUR PAYMENT PROCESSING TIMES**

Make sure donations reach you efficiently. Reducing time between post office pickup and bank deposit and making sure your credit card payments go into your account as quickly as possible are two key ways to improve your processing time.

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## ✔ **COLLABORATE AND LEARN**

Fundraising best practices change rapidly, and so do donors preferences around when, why, and how they donate. By engaging the right industry partners you'll stay ahead of the curve and benefit from not just your own past experiences, but those of countless other fundraisers.

## ✘ **DON'T CUT CORNERS WITH DONOR DATA QUALITY**

A donor data governance plan that covers deduplication, verification, validation, and if necessary enhancement of all donation records will save you time and money. Keeping data accurate as an ongoing process is far more cost effective in the long run.

## ✘ **DON'T PROCESS DONATIONS IN ISOLATION FROM YOUR OTHER DONOR SYSTEMS**

Make sure you have a single view of where your donations are coming from with no duplicates so you can identify donors who may be a good fit for other fundraising categories like events, gifts and wills, or corporate sponsorships.

## ✘ **DON'T RELY ON OUTDATED SYSTEMS AND PROCESSES**

Best practices for security protocols, donations processing systems, and campaign strategies are ever-changing. Working with industry partners with best practice technology, methodologies, and people reduces the burden for a fundraising organisation to keep up with these changes.

## ✘ **DON'T SKIP REPORTING**

Comprehensive and accurate reporting may seem time consuming, however being able to look back on your community's trends and preferences, find patterns, and learn from them for future campaigns in an invaluable part of forging stronger connections with your donors.

## ✘ **DON'T RISK RETURN-TO-SENDER**

Use Australia Post's National Change of Address register, or connect with a data partner with access to NCOA, to make sure you're sending direct mail campaigns to the right address for the right person. Reducing your returns to sender lowers costs and ensures your important message gets to the right person at the right time.

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