Year-End Donor Receipting Checklist

1. Begin with Clean Data

- [ ] Review donor records for duplicates
- [ ] Confirm addresses and email accuracy
- [ ] Identify gifts split across campaigns
- [ ] Check payroll deduction records for mismatches
- [ ] Verify pledge and payment information
- [ ] Use CRM data validation and merge tools

2. Standardize Receipt Templates and Policies

- [ ] Use a consistent receipt template
- [ ] Include donor information, gift details, and tax language
- [ ] Add your United Way's branding and contact info
- [ ] Clarify non-receiptable benefits
- [ ] Align Finance, Resource Development, and IT on template use

3. Automate Wherever Possible

- [ ] Set up batch receipting
- [ ] Enable automatic email receipts
- [ ] Schedule reports for receiptable gifts
- [ ] Use workflow tracking for task assignment
- [ ] Reserve manual review for exceptions

4. Perform a Test Before Sending

- [ ] Send a test email to internal team
- [ ] Check email formatting and branding
- [ ] Verify donor details
- [ ] Confirm gift summaries and tax language
- [ ] Match pledges and payments
- [ ] Have IT or Resource Development review test results

5. Be Strategic in Timing Distribution

- [ ] Schedule distribution between early January and mid-February
- [ ] Choose staggered or all-at-once sending
- [ ] Inform staff of distribution timing
- [ ] Prepare for increased donor inquiries

6. Prepare Donor Support

- [ ] Provide scripts for common questions
- [ ] Share a donor-facing FAQ
- [ ] Clarify reprint and correction procedures
- [ ] Set a process for routing Finance inquiries
- [ ] Ensure staff alignment for consistency

7. Document the Process for Next Year

- [ ] Create a step-by-step workflow
- [ ] Document queries and reporting tools
- [ ] Save template versions and locations
- [ ] Record internal deadlines
- [ ] Note departmental responsibilities
- [ ] Document handling of special cases

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