

Gift Aid Management *giftaid it*

Make each donation go 25% further!

It is estimated that around £750 million in Gift Aid is left unclaimed each year. Research says that over 50% of charities do not claim Gift Aid, as it can be a complicated process.

Blackbaud has collaborated with HMRC to provide a unique Gift Aid service developed specifically to meet your needs. Our complete solution includes:

- Uncovering missed revenue by finding additional Gift Aid you could have claimed
- Saving staff time by outsourcing the labour-intensive process of managing Gift Aid
- Expertise built up over the last 10+ years giving advice on how to manage and maximise Gift Aid
- Creating an accurate Gift Aid trail in Raiser's Edge, so you're always prepared for an HMRC audit
- Protecting the income you have received from Gift Aid in the past with minimum exposure to HMRC for repayments or penalties



Blackbaud's Gift Aid Management Process

The Blackbaud Gift Aid Management team has processed over 5 million documents. We follow a tried and tested implementation process to ensure you can claim every penny of Gift Aid. What's more, we never disclose who we are working with, therefore providing you with total anonymity if we ever need to contact HMRC on your behalf.

1. Historical Clean Up



- Courier: You send us all your paper-based Gift Aid declarations
- Validate: We manually check every current Gift Aid declaration form for validity against HMRC regulations
- Prepare pre-scanned Gift Aid declarations
- Scan and prepare archived declarations
- We index (match) your valid declarations against every donation on which you have claimed Gift Aid

2. Compliance Review



- Identify declaration issues such as missing declarations, conflicting declarations and invalid declarations
- Identify any in-house processes that need implementing

3. Remediation Plan



- Develop a plan to resolve current declaration issues
- Evaluate the benefits of a solus mailing to help resolve issues

4. Ongoing Management

- Capture new declarations
- Keep documentation current, complete and accessible to staff
- Maintain key statistics on status of Gift Aid initiatives

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Gift Aid Reports in The Raiser's Edge

As part of the service, we also write the following helpful Raiser's Edge reports:

1

Gift Aid Status List

Gives a complete list of the declaration status and start date of each supporter captured by the Blackbaud Gift Aid Management team.

'At Risk' Comparison List

Highlights instances where the Gift Aid Status on the Supporter record does not match the Status on the scanned image captured by the Blackbaud Gift Aid Management team, leaving you at potential risk if audited by HMRC.

2

3

Additional Gift Aid Supporters

Gives you a list of supporters where there exists a valid Gift Aid declaration that is not recorded on your database. As the scanned image exists, the Gift Aid should be claimed and the declarations should be added to your database.

Conflicting Declarations

Highlights supporters with both a Yes and a No declaration. These individuals will need to be contacted in order for their status to be properly recorded.

4

5

All Documents List

A complete list of all documents identified by the Blackbaud Gift Aid Management team. This file is used to import all the data back into your database.

Customer Story

The People for the Ethical Treatment of Animals (PETA) Foundation is a UK-based charity dedicated to establishing and protecting the rights of all animals.

Why did you decide to use Blackbaud Gift Aid Management?

“We felt that our old solution had become antiquated and was very labour intensive on our workforce, so we needed to replace it. **Blackbaud Gift Aid Management stood out head and shoulders above the rest**, with a solution that would allow us to easily capture, store and manage all of the paperwork that is used to substantiate our donors’ Gift Aid declarations. It made absolute sense for us to move ahead with this option.”

What results have you seen since using Blackbaud Gift Aid Management?

“All of the laborious tasks have been taken out of our hands now. **The amount of time it saves us is phenomenal, not to mention the benefits from a security point of view** as well. Our annual Gift Aid submissions used to take us weeks to submit, but we can now do them in a matter of hours! This is a massive advantage for us because it means we’re not tied up for large periods of time with submissions, so our time can be better spent developing new strategies to increase funds.”

Apart from saving time, how else has PETA benefitted?

“Our Gift Aid forms are scanned and linked with the relevant supporter records in Raiser’s Edge. We can use the reports to **identify any donations that may be ‘at risk’ or any opportunities that we may have missed** for claiming Gift Aid, which itself is invaluable.”

Would you recommend Blackbaud Gift Aid Management to others?

“Thanks to Blackbaud, we have a very slick process in place and now have the **peace of mind that all information relating to claims is there for us to access whenever we need it**. With this important source of income taken care of, our time can now be better spent working towards many more animal welfare victories.”

The PETA logo is displayed in a large, blue, sans-serif font. The letters are bold and slightly italicized, with the 'P' and 'T' being particularly prominent.