



Understanding the recurring donation process:

When a donor makes a donation online and chooses the monthly option, this initial donation occurs on the day of or the day after it is or was entered. Within 2-4 business days after this donation settles, project managers see the transaction in their reports. The month following the initial donation, and all future months, will be charged to the donors credit/debit card on the 15th of the month.

Example: The donor makes a donation any day in March from the 1st to the 31st > This is their first donation. Then they are entered into the recurring donor system. Their next donation will be April 15th and the 15th of every month thereafter.

The donor can include instructions in the comments section of the initial donation requesting that the donation terminate at some point in the future. Without these instructions, the donation will recur indefinitely or until:

- We are contacted by the project manager or the donor requesting that Joy to the World Foundation discontinue the recurring donation.
- Their card expires. We notify donors by email or letter that their card is going to expire, however, they do not always respond or they do not respond before the 15th of the month.
- Their card declines. We notify the donor and try to run the card for three consecutive months. If the card continues to decline and we do not get any response from the donor, then we completely remove them from the recurring donation system.

When do project managers see these recurring donations in their reports? Recurring donations are posted to operating project accounts 2-4 business days after the recurring donations settle.

Understanding the donor receipting process:

- Recurring Donations
 - Donors giving automatically are batched and processed on the 15th of each month through our recurring credit card donation or ACH bank draft systems.
 - When the donor makes a donation and designates the donation as monthly or recurring, we mail an initial receipt along with instructions to the donor explaining that they will not receive another receipt until we process the last donation for the year in December, and that last receipt issued will have their Year-to-Date donation total for the year. December receipts are typically mailed within the first two weeks of January.
 - It is the donor's responsibility to notify us if they want their recurring donation to continue after they change accounts, cancel a credit card or bank account or if they want us to re-charge a card or re-draft a bank account that had nonsufficient funds at the time of the recurring transaction. We attempt to contact the donor for 3 consecutive months after a failed recurring donation. If we are unable to contact them or do not get a response back from the donor, we will cancel/delete their recurring donation after the 3rd consecutive month of failure.

- All other donations:
 - We send a receipt with every donation at the time the donation is made.
 - Every one-time (*not recurring) online donation receives an immediate email receipt. This receipt does not include Year-to-Date totals. We do not send a printed receipt until the end of the year. This receipt is usually mailed by the second week in January.
 - Every check or cash receipt shows the Year-to-Date total donations form that donor.
 - The last receipt the donor receives serves as their end of the year receipt for tax purposes.
 - For example: The last donation received from a donor was May 2014. The receipt for the May donation serves as their end of the year receipt.
 - We do not send a separate end of the year receipt/summary. However, we will gladly send a duplicate of any receipt to the donor per the donor's request.

I hope you found this overview helpful. Please keep a copy as a quick reference guide.