

Digital FR team – Assessment Questions (appendix 1)

These are the questions that the digital FR team will be checking prior to sign -up / registration

- *How will we receive the donations e.g., via bank transfer – and will it be weekly, monthly etc.?*
- *Will we receive individual donators names and addresses?*
- *Is there a FR pages created element?*
- *Will data contain “further communication preferences”? what is the further contact preference statement – is it email only?*
- *Privacy policy? Need a copy of this*
- *How will we access the data – e.g., do we go to a website and download a statement? what support is available in terms of website administration? – e.g., if we do have to download a statement – will this match transferred funds if that is the method of disbursement?*
- *What are the charges? Platforms fees? Credit card fees? Statement costs? Annual costs?*
- *Is the donor asked about a voluntary contribution if there are no platform fees -?*
- *Is Gift Aid applicable? Are there fees associated with this?*
- *Ongoing contract costs – will there be a contract?*
- *What are the T & C’s?*
- *After care and services?*
- *Check if registration fee or donation – has VAT implications*
- *Check what is the expected return – and do we have any case studies / charities that have benefited from using this platform / service*
- *Do you have any information / benchmarking / case studies on other charities using this platform / service and what does success look like? What is the expected return?*
- *There maybe other things to consider – depending on each platform and service E.g., any new corporate companies that wish us to sign up with a preferred platform – we should suggest the existing corporate platforms that we are already signed up with like “Your Cause” and / or “Work for Good” – if applicable. They may not be aware that we have existing partnerships*