

Assessment Questions (appendix 1)

These are some of the questions that will be asked prior to sign -up / registration

- *Is there a fundraising pages created element to the platform?*
- *How will we receive the donations e.g., via bank transfer – and will it be weekly, monthly etc.?*
- *Are there any payment processing integrations e.g. stripe, PayPal etc?*
- *Will we receive individual donators names and addresses?*
- *Will data contain “further communication preferences”? what is the further contact preference statement – is it email only?*
- *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?*
- *Privacy policy? Copy required*
- *What are the T & C’s? Copy required*
- *What are the charges? Platforms fees? Credit card fees? Statement costs? Annual costs? OR Ongoing contract costs – will there be a contract?*
- *Is the donor asked about a voluntary contribution if there are no platform fees -?*
- *Is Gift Aid applicable? Are there fees associated with this?*
- *After care and services? What does this look like*
- *Does a registration fee or donation – have VAT implications*
- *What is the expected return – and do we have any case studies / charities that have benefited from using this platform / service*
- *How long have you been established as a platform*
- *Credit checks apply*

*There may be 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.*