eGiving Program Checklist

FAITH DIRECT®
inspiring secure giving®

Program Administration	Faith Direct	Other Program	Considerations
Flat Fee Structure	☑	☐	Does the program charge a flat fee inclusive of all its services or a percentage of donations with user fees? Should a church be penalized with higher fees for achieving eGiving success?
Secure Modern Website for Enrollment & Account Maintenance	☑	☐	Can members enroll, and manage their account online? Is the online experience unique to the church, or "generic" for the provider?
Offertory, Second Collections, & Unique Appeals	☑	☐	Members will expect to give to all collections: offertory, second collections and unique appeals, and capital campaigns.
Bank Account Debits & Credit/Debit Cards	☑	☐	Does the church or provider offer both options? 55% of users give using credit cards highlighting the significance of PCI Compliance and requirement for offering a credit/debit payment option.
Mobile Apps	☑	☐	Does the provider have mobile device Apps that members can use to make donations and manage their accounts? Are they available for download from the Apple App Store or Google Play Market?
Online Event Registrations	☑	☐	Can your church create and manage complex customizable online events using the same eGiving platform? Are event registrations an add on item with additional fees?
Program Communication & Fulfillment	**Faith Direct**	**Other Program**	**Considerations**
Complete Handling of Marketing to Members and Enrollment Responses	☑	☐	Is it incumbent upon your church to introduce the electronic giving program to members, provide enrollment materials, and handle enrollment responses? Successful enrollment requires a coordinated marketing effort that inspires users to convert from envelope donors to electronic givers.
Continuous Promotion Materials	☑	☐	Are materials such as in-pew forms, posters, bulletin announcements, and social media posts made available by the provider for year-round eGiving promotion?
Annual Program Stewardship Renewals	☑	☐	Does the provider manage enrollment materials to help your church support its Stewardship message each year?
Multi-lingual Materials	☑	☐	Can the provider supply online and printed materials in languages other than English?
Existing Program Transitions	☑	☐	Can the provider help transition existing eGiving users in a way that is seamless to your members? Does the church carry the burden of transitioning users?

Customer Service	Faith Direct	Other Program	Considerations
Dedicated Customer Service by Phone, Email & Online Chat	☑	☐	How are the multiple phone, email, and online inquiries managed?
Monthly Payment Reminder Emails	☑	☐	Do your members receive a monthly email notice detailing their pending donations?
Personalized Offertory Cards to Replace Envelopes	☑	☐	The liturgy invites us to place something in the basket as a sign of support.
Year End Tax Statements	☑	☐	Tax laws require members to have documentation for their gifts. Are tax statements also available online or mailed to those members who establish accounts?
Administrative Services	**Faith Direct**	**Other Program**	**Considerations**
Management of Donor Debits	☑	☐	Does the church have to initiate the debiting process? What staffing is in place to facilitate?
Monthly Reconciliation & Auditing	☑	☐	What auditing procedures and reporting capabilities are in place to monitor and reconcile eGiving donations?
Monthly Data Upload of Program Results	☑	☐	Does the church have to manually re-key on a monthly basis those eGiving donations for offertory, second, and other collections?
Credit/Debit Card Expiration & Changes	☑	☐	Is the church responsible for contacting members regarding needed updates to their credit/debit card information? What about missed donations?
Program Security & Compliance	**Faith Direct**	**Other Program**	**Considerations**
Payment Card Industry (PCI) Compliant	☑	☐	Does the provider maintain Level 1 PCI compliance protecting your donors' sensitive financial information? Is your church required to self-assess your PCI compliance each year?
Merchant Liability	☑	☐	Who serves as the Merchant of Record on merchant accounts used for processing donations? The Merchant of Record is ultimately responsible for many costs associated with a data breach.
Data Recovery Plan	☑	☐	In the event of a fire, or other catastrophic incident, does the church or provider have an off-site data system to maintain program services for those enrolled?
Data Security	☑	☐	Where are sensitive financial data and information (personal account numbers and credit card numbers) stored? Is financial information keyed at the church? Are paper enrollments received for processing at the church?
Professional Liability & Crime Insurance	☑	☐	Depending upon EFT program or system, are church insurance requirements adequately addressed to cover potential liability issues?
Privacy Policy	☑	☐	Does provider or church have clear policy regarding privacy related issues?

To learn more about the Faith Direct Program, contact us today!
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