

Operational Plan

Updated 11th Feb 2020

The Ryan Castle Foundation

t/a DashDonate.org

Trustees

Ryan Castle

(Some people were here, I've just removed their names)

Y1M1	Register with the Fundraising Regulator	We will be registered with the regulator
	Purchase business mobile	Mobile purchased
	Set up Stripe	Stripe account created
	Set up a charity bank account with Starling	Bank account created
	Set up Xero accounting with Starling account	Xero account created and linked to Starling
	Set up Capsule CRM	Capsule CRM account created for The Ryan Castle Foundation
	Setup GSuite	GSuite account created for DashDonate (customer service email, and admin email)
	Purchase business insurance	Business insurance purchased for The Ryan Castle Foundation
	DashDonate progress - Donation gateway system created and integrated with Stripe, Starling, Xero, and GiftAid service	We are able to process donations through our own online payment gateway. These donations should be processed via Stripe, stored in Starling, logged in Xero for accounting, and formatted for GiftAid reclaim with HMRC
	Donation customisation tools created	Donations can be customised easily by a donor via DashDonate, and one-off/recurring donations are taken based on this
Y1M2	Basic charity account creation	Charities can create an account so that donations can be allocated to charity accounts
	Basic donor account creation	Donors can create an account so that donations can be allocated to donor accounts
	Extend the charity registration process to collect more information about a charity	The charity registration process will capture enough information for us to verify and set up their account.

	Integrate Capsule CRM with charity registration process	When a charity registers or changes details they should be added to/updated in Capsule CRM
	Create pages for charities to share their work	Charities should have pages where they can post updates and receive donations
	Create knowledgebase and resource-holding features for charities	Charities should be able to access learning materials to train their staff in growing their online presence
	Work with a digital marketing expert to produce instructional guides to growing online presence	Have digital marketing guides created and available for charities
	Charity search/listings page	Donors can search for a charity using a number of filters
	Charity donation monitoring tools	Charities can monitor and track donations throughout payment process, and predict future donations using recurring payments and previous monthly trends
	Account settings page for charities	Charities can manage their account, inc staff accounts.

Y1M3	Admin tools for DashDonate staff to monitor users, donations, etc.	We can monitor users, charities, donations, usage etc via DashDonate admin dashboard
	Create donor dashboard	Donors have one place to receive updates about their donations and charities they support
	Create Terms of Service and Privacy Policy	Work with lawyers to produce a Terms of Service and Privacy Policy for DashDonate
	Create agreement for receiving capital on behalf of charities	Work with lawyers to create a contract between The Ryan Castle Foundation and a charity, declaring the receipt/transfer of capital on behalf of charities, agreement of fees, disclaimers, etc.
	Create campaign creation process for donors	Donors will be able to create campaigns to support charities and share their connection to the charity
	Campaign searching/listing page	Campaigns will be searchable both individually and on a charity's 'campaigns' tab
	Create account settings pages for donors	Donors can change their account settings
	Create GDPR compliance tools	Charities and Donors can request a copy of their data, along with tools to delete personal data associated with an account
Y1M4	Launch DashDonate	https://www.dashdonate.org is live and operational with the functionality created in Y1M1, Y1M2 and Y1M3
	Identify charities in Northumberland and onboard them to DashDonate	We will have a list in Capsule CRM of charities to target for onboarding

	Work with onboarded charities to build their online presence and collect donations via our platform	We will have onboarded charities previously identified, and will have set them up to take donations
	Monitor what is and isn't working for charities, and ask for feedback on how we can improve	We will have feedback in which we can identify what needs changing/adding
	Develop new features or modify DashDonate to better aid charities	Using existing feedback, we will modify DashDONate to perform better for charities
	Assess charity performance for phase 2 of the investment of capital	Assess creation and uptake in DashDonate, and receive capital injection to continue operating
Y1M5	Identify regions to target	We will have a list in Capsule CRM of regions to target
	Identify charities in Tyne and Wear and onboard them to DashDonate	We will have a list in Capsule CRM of charities to target for onboarding
	Adapt approach based on feedback, and continue working with charities as with Y1M4	We will have a more refined onboarding approach with charities, and we will have a regular stream of new charities
	Develop new features or modify DashDonate to better aid charities	We will have feedback in which we can identify what needs changing/adding
	Monitor and assess charity performance	Assess uptake in DashDonate and donation figures
Y1M6 Y1M7 Y1M8	Identify charities in the target region and onboard them to DashDonate	We will have a list in Capsule CRM of charities to target for onboarding

	Adapt approach based on feedback, and continue working with charities as with Y1M4	We will have a more refined onboarding approach with charities, and we will have a regular stream of new charities
	Develop new features or modify DashDonate to better aid charities	We will have feedback in which we can identify what needs changing/adding
	Monitor and assess charity performance	Assess uptake in DashDonate and donation figures
Y1M8	Assess charity performance for phase 2 of the investment of capital	Assess uptake in DashDonate, and receive capital injection to continue operating
Y1M9 Y1M10 Y1M11 Y1M12	Identify charities in the target region and onboard them to DashDonate	We will have a list in Capsule CRM of charities to target for onboarding
	Adapt approach based on feedback, and continue working with charities as with Y1M4	We will have a more refined onboarding approach with charities, and we will have a regular stream of new charities
	Develop new features or modify DashDonate to better aid charities	We will have feedback in which we can identify what needs changing/adding
	Monitor and assess charity performance	Assess uptake in DashDonate and donation figures

