

Section C: Code of Conduct

Comments

- C1** At what stage did the fundraiser Fully Disclose to you either verbally or in writing that they were a paid employee?
- N/A if Refusal*
- Before signing
 After signing
 Not disclosed

If the fundraiser does not mention please ask 'Are you a volunteer?'

What was the reply? (Please state)

- C2.** Did they mention paid fundraising at any point or in any other way?
- Only answer if question C1 is answered 'Not disclosed'*
- Yes
 No

- C3.** Did they use open body language whilst talking to you?
- Yes
 No

- C4.** Were they friendly and polite?
- Yes
 No

Section D: Product Technique

Did the fundraiser stress the 'committed' nature of donating in this manner by:

Comments

- D1.** Stating that your support consists of a regular long term donation
- Yes
 No

- D2.** Stating that it is set up through your bank account
- Yes
 No

- D3.** Did the fundraiser explicitly suggest that you could sign up and then cancel the Direct Debit soon after?
- Yes
 No

It's fine to tell you that you can cancel at any time, but not ok to persuade you to sign up now and cancel soon after.

- D4.** Did the fundraiser discuss the charity and it's work?
- Yes
 No

If not mentioned, please ask what does the money get spent on? Please note what was said:

Section D: Product Technique (continued)

Comments

- D5. Did the fundraiser demonstrate good overall product knowledge? Yes
 No

- D6. Was 'Gift Aid' mentioned and the benefits explained about the scheme? Yes
 No

N/A if Refusal

Section E: Regulations

Comments

Please ask: 'Are there are any regulations about fundraising like this?'

- E1. Were you then offered or able to view a copy of the PFRA Code of Practice? Yes
 No

- E2. Were you given a duplicate copy of the Direct Debit form? Yes
 No

N/A if Refusal

- E3. Did the fundraiser explain the next steps in the donation process? Yes
 No

N/A if Refusal

- E4. Were you thanked for your time? Yes
 No

Section F: Refusals *(Answer only if Refusal made)*

Did the fundraiser exert inappropriate pressure to obtain a donation by doing any of the following?

Comments

- F1. Persisting after a refusal? (R) Yes
Please comment on what was said and done No

- F2. Guilt Tripping? (R) Yes
Over-emphasising the negative aspects, ie. your support will stop one more child dying No

- F3. Was the fundraiser pushy, rude or aggressive when you refused? (R) Yes
 No

Section G: Reflection

Comments

G1. Did the fundraiser possess good communication skills (speed and clarity)? Yes

No

G2. Did they use flirtation or inappropriate personal persuasion? Yes

No

G3. Are you absolutely sure that you have just signed an agreement for regular payments from your bank account? Yes

No

N/A if Refusal

G4. Was the charity well promoted by the fundraiser? Yes

No

Please comment if you have a positive recollection of the charity and its work

Please ensure you telephone the office with the details you actually gave the fundraiser if you have not already done so.

Section H: Scores

Section A (First Impressions):	Actual Score	<input type="text"/>	Max Score	<input type="text"/>	Percentage	<input type="text"/>
Section B (Initial Approach):	Actual Score	<input type="text"/>	Max Score	<input type="text"/>	Percentage	<input type="text"/>
Section C (Code of Conduct):	Actual Score	<input type="text"/>	Max Score	<input type="text"/>	Percentage	<input type="text"/>
Section D (Product Technique):	Actual Score	<input type="text"/>	Max Score	<input type="text"/>	Percentage	<input type="text"/>
Section E (Regulations):	Actual Score	<input type="text"/>	Max Score	<input type="text"/>	Percentage	<input type="text"/>
Section F (Refusals):	Actual Score	<input type="text"/>	Max Score	<input type="text"/>	Percentage	<input type="text"/>
Section G (Reflection):	Actual Score	<input type="text"/>	Max Score	<input type="text"/>	Percentage	<input type="text"/>
Total	Actual Score	<input type="text"/>	Max Score	<input type="text"/>	Percentage	<input type="text"/>