GIVING PARTNER

Summer 2020 Updates

Presented by the Community Foundation of Sarasota County & GiveGab

Submit Your Questions!



If you have questions or comments throughout our training, please write in using your Zoom webinar attendee panel.







- What's New for The Giving Partner in Summer 2020?
 - **Donate Button** Donations through The Giving Partner
 - **Boost Fundraising Suite** Fundraise through The Giving Partner
 - Campaigns
 - Events
- Verification How to Become Verified to Fundraise on GiveGab
 - Organization's Representative Information (US Compliance Laws)
 - Organization's Bank Information (Direct Deposit)
- Next Steps and Questions



Who is GiveGab?

GiveGab's mission is to make it incredibly easy for fundraising professionals to be great at their jobs!

Designed to provide a quick and easy way for fundraising professionals to raise money online, GiveGab offers a complete suite of products and services including giving days, everyday giving, and year-round fundraising solutions.



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Ultimate Donor Experience

• Mobile responsive

GiveGab

- Easy-to-use donation form
- Immediate Thank You message
- Dedicated platform support team
- Complete **transparency** with nonprofits and donors
- Safe, secure, and reliable platform
 - Partnered with Stripe (PCI Level 1 Payment Processor) for donation processing and direct deposit of funds
 - All participating organizations verified as IRS and state-recognized nonprofits





Easy & Accessible

- On average, **61% of all emails** are opened on a **mobile device**
- Your profile with The Giving Partner is completely mobile responsive on every page
- Donors can give easily on any internet enabled device











Donate Button

Donate Button - Gifts through The Giving Partner

Credit Card:

3% Platform Fee + \$0.30 per Transaction & 2.2% Transaction Fee (Stripe) =

5.2% + \$0.30

(Example: a \$1,000 donation would have total fees of \$52.30)

ACH: 3% Platform Fee \$3.00 Flat Bank Fee 3% + \$3.00 *\$100 minimum donation (Example: a \$1,000 donation would have total fees of \$33)



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Donations - Fee Transparency

Coniii	Step 3 of 3
Orca Conservancy	Gift: \$25.00
Email:	generousdonor@givegab.com
Fees:	\$2.02
What's with these fees?	ne organizations from having to pay them
Total	\$27.02

Donors can choose to cover all fees on behalf of your organization (they can easily click on an explanation of this within the donation form)



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Simple Donation Processing



- All major credit cards accepted
- Quick and easy donation flow
- Log right into your bank using the Plaid/ACH payment if desired
- Securely processed through Stripe
- GiveGab's chat support available
 within the donation form for donors!





Give, Give, and Give Again!

Donate to more	than one organization Step 1 of 3
Double Dog Dare Rescue	Choose an amount to give: \$ Name to Display (Optional): (Defaults to First and Last Name) Please do not display a name publicly. Please do not display the donation amount publicly. Please do not display the donation amount publicly. Make this a recurring gift. Make this donation in honor of or in memory of someone. Add a Public Message to this Donation Choose Campaign (Optional) move this donation
	Choose an amount to give:

The **Gift Basket** makes it quick and convenient for donors to support as many causes in their community as they like!

*Up to 10 organizations per transaction



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Instantaneous Donor Delight

DAY OF GIVING

Nickie,

Thank you so much for your contribution to our Giving Day! Your donation will help improve our community and the lives of hundreds of individuals throughout our area.

Thank you again!



You are PAW-sitively amazing! Thank you for your generous gift to Logan's Pups. We could not help dozens of dogs every day without you.

> Your donation receipt from Logan's Pups Donor: Nickie Fredenburg Date: February 27, 2020 Organization: Logan's Pups EIN: 12-1234567 Designation: Giving Day Amount: \$10.00 View Your Donations

Customizable Thank You Message

- Add photo or video (YouTube or Vimeo)!
 Choose which works best for your donors.
- Automatically emailed immediately after the gift is made (comes from your organization)
- Includes your organization's EIN and donation amount to act as a tax-deductible receipt



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Viewing & Sharing Your Profile

Järng Aartner		61
he Giving Partner		days
Get Set Up		
mplete the steps below to be sure that you are set up and ready to participate in The Giving Partner.		Add An Administrator
		Add Offline Donation
		🦄 Manage Sponsor Matching
ofile Setup Overview Legal, Planning & Policies Financials Governance Management & Volunteers Program	5	X Manage Donations
Please provide documents as requested by The Giving Partner.		View Registration Info
Add Your Organization's Info	>	Share Your Page
✓ Add Your Story	>	https://dog-staging.givegab.com/organizations/logan-s-pups
Add a 'Thank You' Message		У f
	>	View Your Page

Donate Button - Public User Interface



Community Foundation of Sarasota County, Inc.

Each one of us has the potential to impact a person, a cause, a community!

DONATE (?) 💓 A

<u>Summary</u>	Overview	Legal, Planning & Policies	Financials	Governance	Management & Volunteers	Programs
For 40 years, with causes, o make a differ	the Communit creating lasting ence!	ty Foundation of Sarasota Co g impact across generations.	ounty has matc You can be the	hed donors e one to	Contact Community Foundation of S County, Inc.	Sarasota
					2635 Eruitville Road	



GiveGab

Tips, Tools, and Resources

The Giving Partner Nonprofit

<u>Toolkit</u> has everything you need to reach your fundraising goals!

- Easy access from your Admin Dashboard
- Next steps and requirements for profile set-up





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Next Steps

How do I add my bank account to receive donations through GiveGab? <u>Click Here</u>!

- 1. **Complete** your profile in **The Giving Partner** (if you have not done so already)
- 2. Enter **bank account and organization representative** information (in order to collect donations)
- 3. Enter your organization's **thank you message** information (personalize your organization's auto-response to donors ahead of time)
- Get Verified within 2-3 business days

 *If you do not receive this confirmation after 3 business
 days please reach out to the GiveGab Customer
 Success team at customersuccess@givegab.com.



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Verification Process

Get Verified to Collect Donations



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Adding Your Information

This should match the legal bu	isiness name you have registered with the IR	S.	
EIN/Tax ID		Phone	
Please enter the 9 digits with	out the dash.		
Don't have your EIN? Search h	ere.		
Mailing Address			
Mailing Address Address cannot be a P.O. Box City	State	Postal Code	

		Legal Last Name	
L Legal first and last name as it appears on you	organization representative's social sect	uity card.	
Email		Phone	
Mailing Address			
Address cannot be a P.O. Box			
City	State	Posta	al Code
2			
Organization Rep's Date of Birth			
Month 🛊 Day 🛊 Year 🛊			
Month			

Bank Information

and draining an darris of		Routing	Number
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Checking Account Number

Please note: Donation payouts will show up as "STRIPE TRANSFER" on your bank account statement.

State Charitable Solicitation Compliance

I attest that my organization is compliant with applicable state fundraising requirements in the states in which I may solicit donors using the GiveGab platform. I understand that GiveGab does not solicit donors.

This confirmation will be required to collect donations on GiveGab starting January 1, 2018. Learn more about state charitable solicitation compliance.

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Why Is This Information Needed?

- GiveGab must remain **compliant** with federal law, as it is an online platform that collects, processes, and distributes money in the form of donations from supporters to organizations.
- As a US based organization, we are required to abide by compliance laws that are part of Know Your Customer, the Customer Due Diligence Rule, and the Patriot Act.
- The <u>CDD Rule</u> requires payment processors, such as Stripe (GiveGab's payment processor), to ask for additional information about organization representatives who are collecting funds through platforms like GiveGab.
- We've partnered with Stripe as our payment processor and underwriter for nonprofit verification, which is a PCI Service Provider Level 1 (the most stringent level of certification possible). You can learn more about this on their <u>website</u>.

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How is this information stored?

- This information is encrypted and securely stored within Stripe.
- Not even GiveGab people can access this information.
- To reset this information, please reach out to the blue chat bubble to get this process started.





Are You Ready to Accept Donations?

Check your organization's verification status on your Admin Dashboard

Status: Unverified

Please verify your organization's information <u>here</u> to ensure you are able to collect donations on GiveGab. Verification can take up to 2-3 business days after your information has been entered. Questions? <u>Chat with us!</u>

Donation Status: Pending

Additional information is required to verify your organization to accept donations. Please <u>Contact Us</u> if you have any questions. <u>You can see your currently entered information here.</u>

Status: Incomplete

How do I determine

my organization's verification status?

Click Here!

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Please provide your organization's information and verify you can collect donations in your state to be able to collect donations on GiveGab.

Donation Status: Pending

Your organization is pending re-verification but can still accept donations. Are you a religious entity, government agency, or subsidiary of a national organization? Please <u>Contact Us!</u>

Status: Verified

Hooray! Your organization has been verified to accept donations on GiveGab.

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Donations & Donor Data

Donations are Deposited Electronically!

- Donations are **direct deposited** to nonprofit organization's bank account within 5-7 **business** days
 - No paper checks to deposit
 - It is important to ensure your organization is verified so that donations make it to your account successfully







How Will You Access Your Donor Data?



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How Will You Access Your Donor Data?

Dona	tions												
Total P	aid Out	: \$240,8	04.74				Tot	al Pendir	ıg: \$6,164.	39			
	ates and time:	s on this page (are displayed in	your computer's ti	me zone. If you export your do	mations from this pay	je, dates and	times in that file v	will appear in UTC	to assist with bank	statement reconc	iliation processes. <u>Lea</u>	rn More
Search b	y name or e	mail			More filters	1							
All Giving I	Days			2	All Campaigns				•	Any Donation	Туре		
Start			0 1	End	0								
Actions	Donation I	D Date 🗸	Donor 🗸		Intended Donation \vee	Amount Charged	Bank Fees	Platform Fees	Covered Fees?	Payout Amount	Payout Date $ \smallsetminus $	Display Name	Donor Address
Actions	Donation II	D Date ✓ 7/11/2019 9:50am	Donor ~ Australia Mate	ch Test	Intended Donation ~ \$25.00	Amount Charged	Bank Fees	Platform Fees	Covered Fees?	Payout Amount \$25.00	Payout Date ~	Display Name	Donor Address
Actions	Donation II 15062 15061	Date → 7/11/2019 9:50am 7/11/2019 9:38am	Donor V Australia Mato test denis.tomazzi	ch Test i@givegab.com	Intended Donation ~ \$25.00 \$100.00	Amount Charged \$25.00 \$100.00	Bank Fees	Platform Fees	Covered Fees?	Payout Amount \$25.00 \$100.00	Payout Date ~ N/A N/A	Display Name	Donor Address 213 N Cayuga St Ithaca , New York United States
Actions	Donation II 15062 15061 15059	Date ~ 7/11/2019 9:50am 7/11/2019 9:38am 7/10/2019 2:59pm	Donor ~ Australia Mato test denis.tomazzli Karin Edsall karin.edsall@g	ch Test i@givegab.com givegab.com	Intended Donation \$25.00 \$100.00 \$150.00	Amount Charged \$25.00 \$100.00 \$156.75	Bank Fees	Platform Fees	Covered Fees? Yes	Payout Amount \$25.00 \$100.00 \$150.00	Payout Date ~ N/A N/A Pending	Display Name	Donor Address 213 N Cayuga St Ithaca , New York United States 401 State St Ithaca, New York United States
Actions	Donation II 15062 15061 15059 15058	D Date ~ 7/11/2019 9:50am 7/11/2019 9:38am 2/10/2019 2:59pm 7/10/2019 2:44pm	Donor ~ Australia Mato test denis.tomazzli Karin.Edsall karin.edsall@g Australia Mato	ch Test i@givegab.com givegab.com	Intended Donation ~ \$25.00 \$100.00 \$150.00 \$150.00 \$100.00	Amount Charged \$25.00 \$100.00 \$156.75 \$100.00	Bank Fees	Platform Fees	Covered Fees? Yes	Payout Amount \$25.00 \$100.00 \$150.00 \$100.00	Payout Date >> N/A N/A Pending N/A N/A	Display Name	Donor Address 213 N Cayuga St Ithaca , New York United States 401 State St Ithaca, New York 1 United States
Actions	Donation II 15062 15061 15059 15058 15057	Date 7/11/2019 9:50am 9:50am 7/10/2019 2:59pm 7/10/2019 2:44pm 7/10/2019 2:44pm	Donor ~ Australia Mato test denis.tomazzi Karin.Edsall karin.edsall@g Australia Mato Denis Tomazzi denis.tomazzi	ißgivegab.com givegab.com ch Test zi ißgivegab.com	Intended Donation \$25.00 \$100.00 \$150.00 \$100.00 \$100.00 \$100.00	Amount Charged \$25.00 \$100.00 \$156.75 \$100.00 \$100.00	Bank Fees \$3.75 \$2.50	Platform Fees	Covered Fees? Yes No	Payout Amount \$25.00 \$100.00 \$150.00 \$150.00 \$195.50	Payout Date > N/A N/A Pending N/A Pending	Display Name	Donor Address 213 N Cayuga St Ithaca, New York United States 401 State St Ithaca, New York 1 United States 213 N Cayuga St Ithaca, New York United States

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How Will You Access Your Donor Data?

0	14267	5/23/2019 2:21pm	\$22.22	\$22.22				\$22.22	N/A
0	14266	5/23/2019 2:21pm	\$22.22	\$22.22				\$22.22	N/A
(s)	14265	5/23/2019 2:21pm	\$22.22	\$22.22	\$0.79	\$1.00	No	\$20.43	5/26/2019
0	14253	5/22/2019 9:29am	\$200.00	\$200.00				\$200.00	N/A
0	14252	5/22/2019 9:29am	\$200.00	\$200.00				\$200.00	N/A
(s)	14251	5/22/2019 9:29am	\$200.00	\$200.00	\$4.70	\$9.00	No	\$186.30	5/22/2019
0	14250	5/22/2019 9:28am	\$500.00	\$500.00				\$500.00	N/A
0	14249	5/22/2019 9:28am	\$500.00	\$500.00				\$500.00	N/A
Export CS	Page 1 of 71	Account Info							

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Boost Fundraising Suite

Boost Fundraising Suite - Fees

Now Through November 15, 2020 Special Promotion (must opt-in to trial)

\$0 Subscription (fundraise now through November 15th - get started now to make the most of this opportunity!)

> + 4% Platform Fee + 2.2% & \$0.30 Credit Card Fee = 6.2% + \$0.30

After November 15, 2020

(If organization elects to continue/opt-in **after** November 15, 2020)

\$40 - \$59 Subscription (per month based on number of The Giving Partner nonprofit partners that opt-in) + 4% Platform Fee + 2.2% + \$0.30 Credit Card Fee

Monthly Subscription Fee + 6.2% + \$0.30

THE



Boost Fundraising Suite - Overview

- **Unlimited** Campaigns and Events (while subscribed)
- Integrated Peer-to-Peer Fundraising for Campaigns and Events
- Automatic Email Reminders to Peer-to-Peer fundraisers to Keep them Engaged
- Full Suite of Campaign and Event **Analytics**
- Embeddable Donate Button
- Easy Opt-In
 - Once you opt-in, the Campaigns and Events Menu will appear on your Admin Dashboard



Boost Fundraising Suite - Campaigns

- **Customizable** (images, colors and templates)
- Customizable Donation Tiers
- **P2P** and **Team** Fundraising
- Video Support

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- **Social Sharing** Prompts
- Automatic Thank You Message (Tax Deductible Receipt) different

Thank You message vs. Donate Button Thank You message

• Live Chat Support 9am - 5pm EST



Support Literacy & Technology at GCCS!

Help bring books, computers, and more to our school's Media Center.

A fundraising campaign for Global Community Charter School



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"Knowledge sets us free, art sets us free. A great library is freedom." - Ursula K. Le Guin



Since moving into our new space in the spring of 2015, we have renovated our classrooms, bathrooms and kitchens, and now it's time to improve our Media Center, and *we need your help!*

Your donation will directly support improvements to our students' access to technology with a new computer lab and a SMARTboard interactive whiteboard as well as help expand our library collection.

What GCCS Needs:

As part of our Media Center Improvement Plan, GCCS intends to expand its library collection and introduce new

technology to our staff, students, and families.

- The computer lab will function as an important technological resource for our school community, and allow us to provide computer literacy instruction, facilitate independent research projects, programming classes and parent workshops.
- A SMARTboard will allow teachers to lead interactive instruction, engage visual, kinesthetic, and auditory learners simultaneously, and facilitate inclusive communication and collaboration between students and teachers.
- We are also expanding our Media Center's library collection by adding more books!

By helping us introduce this technology to our school you will be providing 21st century tools that facilitate learning and empower our students, staff, and families to engage our learning community in new ways.

Help Support our Media Center Today!

Top Fundraisers

Fund	raising Champion	Amount Raised
	Bill Holmes	\$1,440.00
•	Ibrahim Yusuf	\$1,140.00
•	Andrei Hirschhorn	\$1,000.00
•	Peter Kauffman	\$850.00
•	Phyllis Siwiec	\$500.00
•	Kate McGovern	\$455.00
9	Yverose Ezrin	\$330.00
0	Mary Jilek	\$200.00
0	Robert Moser	\$200.00
•	Addy Jeet	\$130.00
	See More Fundr	aisers
	Recent Do	nors
•	Christina quiles For: Annie Flores's Ca Good luck!	525.00 ampaign
•	tessa ray \$100.00	
•	GCCS Bake Sale	\$1,100.00
•	Julia Torres \$40.0	00
•	Sean Mendoza	14.00



View All Donors

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Boost Fundraising Suite - Events

- **Customizable** (messaging, media, branding, etc.)
- Individual Team and P2P Pages
- **Customizable** Registration Forms
- Multiple Registration Types
- Ability to **Register Multiple People at Once**
- "Swag" Item Options (raffle tickets, t-shirts, etc.)
- Easy Registrant **Reporting**

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About the Walk

Lupus is the least known major disease of our day. Those with the disease struggle with a multitude of changing symptoms, pain, and not knowing what is happening to them, for an average of five years, before even being diagnosed. Imagine waiting for anything for 5 years, let alone an answer to what's hurting you! What's more, lupus affects each person differently; making the lupus journey a very lonely path.

The 2017 Walk to Shine the Light on Lupus is more than a fundraiser. It is a pledge to nearly 13,000 North Eastern New Yorkers that they are not alone. We are walking with and for them, to provide the help and hope they need to be strong and to live their best lives. We are advocating, raising awareness and funding research for earlier detection, better treatment and, ultimately, a cure.

Your contribution will help provide vital resources, new patient orientations and support group meetings, free of charge, for lupus patients and their loved ones. With your help, we can shine the light on lupus and light their path.



Giving Levels and Rewards

- \$50 \$199 Walk T-shirt
- \$200 \$299 Walk T-shirt and cap
- · \$300 \$499 Walk T-shirt, cap, and \$25 mall gift card
- · \$500 \$759 Walk T-shirt, cap, and \$50 mall gift card
- · \$750 \$999 Walk T-shirt, cap, and \$75 mall gift card
- · \$1,000+ Walk T-shirt, cap, and \$100 mall gift card

Teams of 5 or more raising \$2,500+ win a pizza party, and team members receive prizes according to the amounts they raised!

To be counted toward gift levels, contributions should be in no later than October 14th!



Event Details

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Registration: 7:30AM Walk Start Time: 8:30AM Address: Crossgates Mall, 1 Crossgates Mall Rd, Albany, NY 12203 (Une Beel By entance.)



Top Fundraisers

und	raising Champion	Amount Raised
0	Patty Cate	\$1,247,00
8	Amber Therkildsen	\$120.00
8	Marilyn Kasparian	\$120.00
8	Jesse Zwock	\$120.00
8	Crystal DiTonno	\$100.00
3	James Cotsonas	\$50.00
8	Jennifer Smith	\$45.00
3	Sarah Cotsonas	\$45.00
3	Alis Kasparian	\$40.00
9	Jessica Halter	\$20.00

See More Fundraisers

Top Fundraising Teams

Team	Name	Amount Raised
-	Lupus Awareness Walk for Lisa	\$1,247.00
-	Cathy's Wings	\$550.00
٩	Jen's Warriors	\$140.00
۹	TEAM LAURA	\$60.00
	Team Nub Log	\$40.00
۲	Elyse's Angels	\$20.00

See More Teams

Susan Leader \$25.00 For: Sarah Cotsonas's Campaign Best of luck.

- All 100		and the second s	A start water of	E 10 00
	0.00	unuy i	macey	210.00
-				

B Sarah Cotsonas 520.00 For: Sarah Cotsonas's Campaign

Jeremy pratico Science
 For: Jennifer Smith's Campaign
 So proud of my Disney partneril Yahoooll You are amazingil Love yal

James Cotsonas 540.00 For James Cotsonas's Campaign

View All Donors



Boost Fundraising - How to Sign Up?

- You will receive a direct URL link and password from the Community Foundation.
- **Opt-in** by signing up through the form and click "Submit"
- Boost Fundraising Suite will be applied to your profile within 24 business hours!
- Then, create your
 Campaign/Event!

New Fundraising Resources for COVID-19 Crisis Relief								
GiveGab • WHO WE SERVE	▼ SOLUTIONS ▼ RESO	URCES	LOG IN	EQUEST DEMO				
Password Required								
Please enter the password required to view this page.								
		I						
Submit								
WHO WE SERVE	SOLUTIONS	RESOURCES	LOGIN					
Foundations	Giving Days	Support Center	REQUEST DEMO					
Educational Institution	s Community Giving	Customer Success Stories	CAREERS					
Nonprofits	Philanthropy Hub	Featured Campaigns						
Public Media	Crowdfunding	Blog						
Our Partners	Donation Forms	Resource Library						
	P2P Fundraising Suite	Our Story						



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Support & Resources

- Help Center: <u>https://support.givegab.com/</u>
- Blog: <u>https://www.givegab.com/blog/</u>
- Email: <u>CustomerSuccess@givegab.com</u>
- Chat with GiveGab's Customer Success

Team whenever you have questions or

need a hand!

Look for the little blue chat bubble!

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Hi there 👋

We're here to answer your questions about GiveGab, chat about your fundraising strategy, suggestions on how we can improve, or just to say hi 👋 Chat with us!







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Questions?

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Thank you & happy fundraising!