Leveraging the Donate Button (Getting Verified and Accessing Donor Data)
Agenda

- **Donate Button** - Donations through The Giving Partner
- **Verification Process** - How to become *verified* in order to receive donations and fundraise through The Giving Partner
  - Organization’s Representative Information (US Compliance Laws)
  - Organization’s Bank Information (Direct Deposit)
- **Donations & Donor Data** - Learn how this works and how to access your donor data
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.
Ultimate Donor Experience

- Mobile responsive
- 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 - Gifts through The Giving Partner

Credit Card:

3% Platform Fee + $0.30 per Transaction & 2.5% Transaction Fee (Stripe) = 5.5% + $0.30

(Example: a $1,000 donation would have total fees of $55.30)

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)
Donations - Fee Transparency

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).
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!

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*
Instantaneous Donor Delight

● 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**
View & Share Your Profile

The Giving Partner

Get Set Up
Complete the steps below to be sure that you are set up and ready to participate in The Giving Partner.

- Add Your Organization's Info
- Add Your Story
- Add a 'Thank You' Message

Time to launch
61 days

Share Your Page
https://dog-staging.giveGab.com/organizations/logan-s-pups

View Your Page
Community Foundation of Sarasota County, Inc.

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

For 40 years, the Community Foundation of Sarasota County has matched donors with causes, creating lasting impact across generations. You can be the one to make a difference!
Verification Process
Get Verified to Collect Donations

Set up your banking information to receive secure online donations.
Adding Your Information

1. **Organization Information**
   - **Business Name**: [Field]
     - This should match the legal business name you have registered with the IRS.
   - **EIN/Tax ID**: [Field]
   - **Phone**: [Field]
     - Please enter the 9 digits without the dash.
     - Don’t have your EIN? Search here.
   - **Mailing Address**: [Field]
     - Address cannot be a PO Box.
   - **City**: [Field]
   - **State**: [Field]
   - **Postal Code**: [Field]

2. **Organization Representative**
   - **Legal First Name**: [Field]
   - **Legal Last Name**: [Field]
     - Legal first and last name as it appears on your organization’s representative’s local security card.
   - **Email**: [Field]
   - **Phone**: [Field]
   - **Mailing Address**: [Field]
     - Address cannot be a PO Box.
   - **City**: [Field]
   - **State**: [Field]
   - **Postal Code**: [Field]
   - **Organization Rep’s Date of Birth**: [Month] [Day] [Year]
   - **Last 4 Digits of Organization Rep’s SSN**: [Field]

3. **Bank Information**
   - **Routing Number**: [Field]
   - **Checking Account Number**: [Field]
     - Please note: Donation payouts will show up as “STRIPE TRANSFER” on your bank account statement.

4. **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.

   [Save]
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 **CDD Rule** 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 [website](http://givegab.com).
How is this information stored?

- This information is encrypted and securely stored within Stripe.
  - Not even GiveGab 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

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unverified</strong></td>
<td>Please verify your organization’s information <a href="#">here</a> 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? <a href="#">Chat with us</a>.</td>
</tr>
<tr>
<td><strong>Incomplete</strong></td>
<td>Please provide your organization’s information and verify you can collect donations in your state to be able to collect donations on GiveGab.</td>
</tr>
<tr>
<td><strong>Pending</strong></td>
<td>Additional information is required to verify your organization to accept donations. Please <a href="#">Contact Us</a> if you have any questions. You can see your currently entered information <a href="#">here</a>.</td>
</tr>
<tr>
<td><strong>Verified</strong></td>
<td>Hooray! Your organization has been verified to accept donations on GiveGab.</td>
</tr>
</tbody>
</table>
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

![Status: Verified](https://example.com/status.png)

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**Verified**

Hooray! Your organization has been verified to accept donations on GiveGab.
How Will You Access Your Donor Data?

Admin Dashboard

Giving Days

Giving Day!
November 13, 2019

View All Giving Days

Fundraising Campaigns

It's A Dogs World
December 11, 2017 $20,467.22 Raised

View All Campaigns

Fundraising Events

2018 Summer Gala

Viewing Dashboard for Logan's Pups
How Will You Access Your Donor Data?

### Donations

**Total Paid Out:** $240,804.74

<table>
<thead>
<tr>
<th>Action</th>
<th>Donation ID</th>
<th>Date</th>
<th>Donor ID</th>
<th>Intended Donation</th>
<th>Amount Charged</th>
<th>Bank Fees</th>
<th>Platform Fees</th>
<th>Covered Fees</th>
<th>Payout Amount</th>
<th>Payout Date</th>
<th>Display Name</th>
<th>Donor Address</th>
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</tbody>
</table>

Dates and times on this page are displayed in your computer's time zone. If you export your donations from this page, dates and times in that file will appear in UTC to assist with bank statement reconciliation processes. [Learn More](#)
### How Will You Access Your Donor Data?

<table>
<thead>
<tr>
<th>#</th>
<th>Date</th>
<th>Time</th>
<th>Amount</th>
<th>Fund Amount</th>
<th>Notes</th>
<th>Date Accessed</th>
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<td>9:29am</td>
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<td>$500.00</td>
<td>$500.00</td>
<td>N/A</td>
</tr>
</tbody>
</table>

[Export CSV]

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[Viewing Dashboard for Logan's Pups]

[GiveGab Logo]
Next Steps

1. **Complete** your profile in **The Giving Partner** (if you have not already done so)

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)

4. **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.*
Support & Resources

- Help Center: https://support.givegab.com/
- Blog: https://www.givegab.com/blog/
- Email: CustomerSuccess@givegab.com
- Chat with GiveGab’s Customer Success Team whenever you have questions or need a hand!
  - Look for the little blue chat bubble!