Agenda

● Overview of The Giving Partner
● Who is GiveGab?
● Profile Tour - How to Navigate Your Organization’s Profile
● Updating/Maintaining Your Organization’s Profile
● Next Steps
● Questions & Assistance
Overview of The Giving Partner
What is The Giving Partner

The Basics:

● An **online** platform that helps foundations, donors, businesses, media partners, and other investors understand the local charitable marketplace

● **Searchable** database of IRS verified 501(c)(3) nonprofit organizations with **local** impact in Sarasota, Manatee, Charlotte, and/or Desoto counties
  ○ Ability to search for both volunteer and board member opportunities

● **Donate button** offer the ability to accept donations year-round
The Giving Partner is NOT

- A grant application or guarantee of funding
- A certification, rating or grade of any kind
- A substitute for human relationships
- The Giving Challenge
  - Although the names are similar, the Giving Challenge is separate and is a 24-hour online fundraising event available exclusively to nonprofits with an Approved/CURRENT profile status in The Giving Partner
The Community Foundation of Sarasota County, along with several other foundations and organizations, look for profiles with an Approved/CURRENT status when making funding decisions. They utilize the data and information:

- To inform giving decisions in one-on-one work with donors – matching the impact that donors want to have with the impact of nonprofit programs and services
- To learn who’s who – how your organization is different
- To understand the kinds of support that nonprofit organizations need to be effective
Why Update/Maintain Your Profile?

A profile with an Approved/CURRENT status:

- **Increases awareness** of your nonprofit organization among potential donors and new audiences
- **Tells your story** (makes a case for support, and helps the community understand your nonprofit organization's impact)
- **Qualifies** your nonprofit organization to participate in competitive grant programs, trainings, and the Giving Challenge
Who is GiveGab?
GiveGab - Our Technology Partner!

- Safe, secure, and reliable platform
- **Fail-safe redundancy**
  - Load testing
  - Cloud services
  - Backup plans
- Dedicated platform support team via Blue Chat Bubble!
- Partnered with Stripe (**PCI Level 1** payment processor)
- All participating organizations verified as IRS and State recognized nonprofits
Easy & Accessible Platform

- On average **61% of all emails** are opened on a mobile device
- Your organization's profile is completely mobile responsive on **every page**
- Donors can view your profile on **any internet enabled device**
Profile Tour
Login to Your Admin Dashboard
Customize Your Organization’s Profile

Get Set Up

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

<table>
<thead>
<tr>
<th>Profile Setup</th>
<th>Overview</th>
<th>Legal, Planning &amp; Policies</th>
<th>Financials</th>
<th>Governance</th>
<th>Management &amp; Volunteers</th>
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Nonprofit Giving Platform
Add Your Organization's Info

- **Tagline** - Brief overview of organization (75 character limit)
- **Website**
- **Logo**
- **Causes** - Select up to 3 that best identify your organization (supporters can easily search for causes they're interested in).
The Giving Partner is your online resource for informed charitable decisions, connecting philanthropy and our community!
Add Your Story

Get Set Up
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Add Your Story

- Tell your organization's story (add photos here too)!
- Add a Video

Visuals make your profile much more engaging!

GiveGab™
Nonprofit Giving Platform
Additional Features

- **Easily share** your organization's profile with supporters:
  - Custom URL
  - Twitter
  - Facebook
Adding Administrators

- Located on the left panel, the organization's designated Profile Administrator(s) have access to add additional administrators that can make edits to the profile.
- When you add an administrator, an email is sent to the individual from notifications@givegab.com.
- The email contains login information.

![Add Administrator Form]

First Name: [Input]
Last Name: [Input]
Email: [Input]

Make this person an administrator for The Community Foundation of Sarasota County.

[Cancel] [Add Member]
Add Organization Info to Tabs

Overview

Mission

Describes the reason your organization exists (maximum of 100 words).

Almost Home Dog Rescue, Inc. exists to rescue abandoned/unwanted dogs, primarily Jack Russell and other small terriers, that would otherwise be euthanized or live a life of privation on the street. We transport them to shelter in an approved foster home, provide food and veterinary care as needed (including spay/neuter, heartworm test, all necessary vaccinations and microchip), and maintain a website and telephone to facilitate adoptions and raise community awareness.

Mission Category
Updating/Maintaining Your Profile!
Updating/Maintaining Your Profile

- Certain data and documents in your profile will expire at different intervals throughout the year and must be updated accordingly.

- Be sure to login to your profile regularly to review key items, and make necessary updates.

- We recommend setting a calendar reminder (monthly or quarterly) to login and ensure that you’ve not missed any key updates.
Next Steps
Next Steps

There are many great opportunities available exclusively to nonprofit organizations that have a profile in The Giving Partner with an Approved/CURRENT status!

- To get started creating a profile, or, making updates to an existing profile, click here.
- Please pay attention to instructions, as these have been designed to answer your questions.
- If you are not comfortable with technology - find someone who can help! The person working on your profile should have, or have access to, adequate knowledge about your organization, along with very basic technical knowledge, in order to answer all questions (some of which require detailed descriptions), and to accurately complete the profile. Be mindful around who is chosen for this responsibility.
Questions & Assistance

● If you encounter any technology issues, need clarification, or help uploading documents, connect with the Customer Success Team by clicking the Blue Chat Bubble (bottom right of the website), or send an email to: CustomerSuccess@givegab.com

  ○ Monday-Friday, 8AM-5PM EST

● If you have any further questions, please email Nonprofits@CFsarasota.org
Thank You!