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

● **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.
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
● 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 & 2.2% 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)
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
### The Giving Partner

#### Get Set Up

Complete the steps below to be sure 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>
<th>Programs</th>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Please provide documents as requested by The Giving Partner.**
- **Add Your Organization’s Info**
- **Add Your Story**
- **Add a ‘Thank You’ Message**

**Share Your Page**

https://dog-staging.givegab.com/organizations/logan-s-pups

- [Twitter](#)
- [Facebook](#)

**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!
The Giving Partner **Nonprofit Toolkit** has everything you need to reach your fundraising goals!

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

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)
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.

How do I add my bank account to receive donations through GiveGab? [Click Here!](#)
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**
   - **EIN/Tax ID**
   - **Phone**
   - **Mailing Address**
   - **City**
   - **State**
   - **Postal Code**

2. **Organization Representative**
   - **Legal First Name**
   - **Legal Last Name**
   - **Email**
   - **Mailing Address**
   - **City**
   - **State**
   - **Postal Code**
   - **Organization Rep’s Date of Birth**
   - **Last 4 Digits of Organization Rep’s SSN**

3. **Bank Information**
   - **Routing Number**
   - **Checking Account Number**

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.
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

How do I determine my organization’s verification status? [Click Here]!
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

![Verified Status](image-url)
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

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<th>Platform Fees</th>
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<td>$25.00</td>
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<tr>
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</table>

Total Paid Out: $240,804.74  
Total Pending: $6,164.39

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?

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<td>$500.00</td>
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</tbody>
</table>

[Export CSV]
Boost Fundraising Suite
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
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**

● **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

90 Donors
$8,889 Raised of $15,000 goal
25 Days left

Please Select a Giving Level

- **$25**
  Two books for our school library collection

- **$50**
  Four books for our school library collection

- **$150**
  A Chromebook computer for one of our students

- **$500**
  Donations of $500 or more will count toward our purchase of a SMARTboard!

**Enter an amount**
Don't see your desired giving level? Please enter your own amount.

Make an exponential difference
Spreading awareness is a great way to help support our cause.
"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!
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
NENY Walk to Shine the Light on Lupus

$15,000
Goal

$2,057
Raised

15
Fundraisers

30
Donors

Event Information
📅 Sunday, March 19, 2017

$ Make a General Donation
A fundraising event for Lupus Alliance of Upstate New York

Share this Event!

GiveGab®

THE GIVING PARTNER
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 and cap
- $200 - $299 - Walk T-shirt, cap, and $25 mall gift card
- $300 - $499 - Walk T-shirt, cap, and $50 mall gift card
- $500 - $799 - 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

Registration: 7:30AM
Walk Start Time: 8:30AM
Address: Crossgates Mall, 1 Crossgates Mall Rd, Albany, NY 12203

See More Teams

Recent Donors

- Susan Leader: $55.00
- Courtnie Macay: $100.00
- Sarah Cotanos: $20.00
- Jeremy pratton: $10.00
- James Cotanos: $20.00

See More Donors
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!
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!
Questions?
Thank you &
happy fundraising!