

# Midlands Gives Logistics Webinar #4

**EVERYONE**  
can be a philanthropist



MIDLANDS  
**GIVES**

Powered by CENTRAL CAROLINA  
Community Foundation

[midlandsgives.org](http://midlandsgives.org)

# Presenters

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Nancye Bailey  
*Midlands Gives*  
*Coordinator*



Cherise Arrendale  
*Strategic Initiatives &*  
*Communications Manger*

# Agenda for Today's Webinar

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- Profile/Donate Button
- Crisis Plan
- Thanking Donors
- Refunds
- Check Disbursement
- Reminders/Important Dates

# Your Profile

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# Edits to Your Profile

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- The deadline to make edits to your profile was Monday, April 2<sup>nd</sup>.
- You still have the ability to upload the matching gift forms to your profile – deadline is April 27<sup>th</sup>.
- You can still upload information under the Events section until April 27<sup>th</sup>.
- You can still review and approve Champion Pages – deadline to approve is April 27<sup>th</sup>.

# Donate NOW Button

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- On May 1st, remove or disable any buttons on your site that donors might use to donate to you on a normal day
- Add the Midlands Gives logo to your site with a link to your Midlands Gives profile

# Link to your Profile

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## Organization Information

**Organization Name**

One SC Relief Fund

**EIN (Federal Tax ID Number)**

57-0793960

**Logo****Primary Category**

Community Improvement

**Direct Phone Number**

803-254-5601

**Email**

[info@yourfoundation.org](mailto:info@yourfoundation.org)

**Doing Business As****Founding Year**

2015

**URL Link**

<https://www.midlandsgives.org/OneSC>

**Acronym****Operating Budget**

Less than \$750,000

**Secondary Category****Extension**

x322

**Fax**

803-799-6663



## Principal Contact Information



# Crisis Plan

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# Crisis Plan

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What constitutes a crisis:

- Natural disaster
- Local disaster
- Site crash
- System failure
- Payment processing failure

# Crisis Plan

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In the event the system does have a catastrophic glitch the following safeguards have been put into place:

1. A backup giving platform that can be switched to with the touch of a button
2. A backup payment platform that can be instantly put into place

# Crisis Plan

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In the event of a crisis occurring during Midlands Gives, we will communicate with you via the following:

1. The Midlands Gives Facebook Group
2. The Midlands Gives website – if available
3. The Central Carolina Community Foundation website – [yourfoundation.org](http://yourfoundation.org) (Site Status Page)
4. Email
5. Updates for the community will also be posted on Facebook and Twitter and sent to media outlets.

# Crisis Plan

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What you should do if a crisis occurs:

1. Wait for information from the Midlands Gives team.
2. Upon official word, communicate to your donors through social media, email, etc.

# Crisis Plan- Site Status Page

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<https://www.yourfoundation.org/MidlandsGivesStatus>

Bookmark this page to check for status updates of the Midlands Gives website.

If issues arise, we will update the page with indicators and update the status log with information on potential resolutions.

# Post-Event Information

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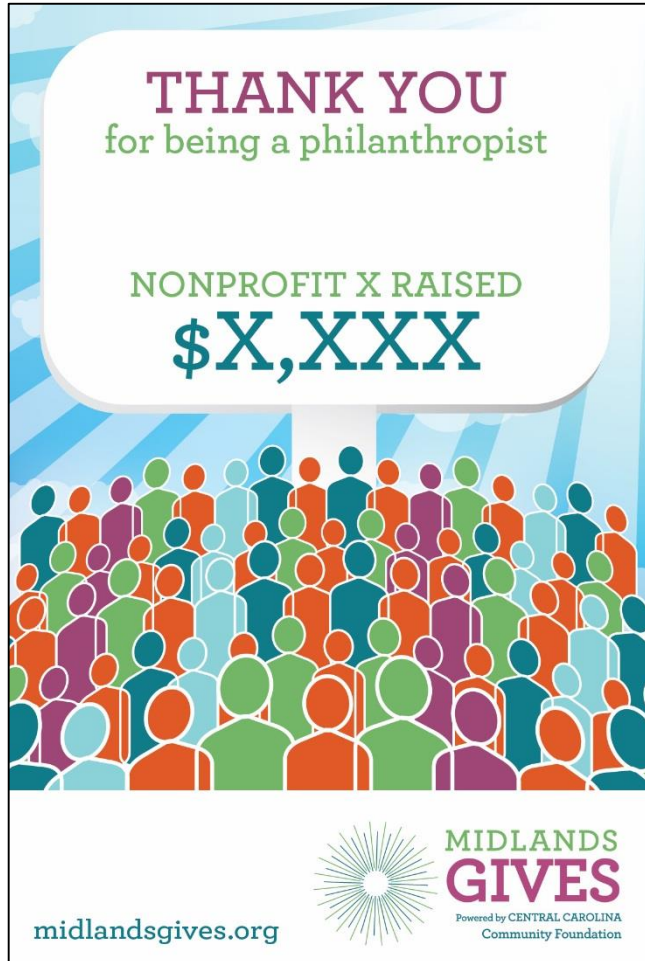


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# Thanking Donors



It is important to thank your donors!

- Monitor your donations in real time
- Send emails to donors thanking them as they come in
- Pick up the phone and call donors – especially ones who make large gifts
- Follow up after Midlands Gives with a note/letter/phone call



# Refunds

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When we CAN make them:

- When a donor has made an error in their donation: \$200 instead of \$20
- If a donor made a donation to one organization that was meant for another
- If a donor hits the submit button more than once resulting in duplicate donations

When we CANNOT make them:

- If a donor changes their minds completely about donating

# Refunds

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How to request a refund:

Send an email to [midlandsgives@yourfoundation.org](mailto:midlandsgives@yourfoundation.org) with the following information:

- Donor's name
- Organization they gave to
- The reason for the refund request

# Receipts

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Donors will automatically receive an email receipt for their donation. If a donor contacts you for a receipt, you can generate a duplicate by following these steps:

- 1) Login to your Dashboard
- 2) Go to Donation Information
- 3) Click the “Send Receipt” button to the right of the specific donation.
- 4) The receipt will automatically be sent to the email address submitted when the donation was made

# Receipts

[Overview](#)[Donation Information](#)[Donation Levels](#)[Programs](#)[Events](#)[Multimedia](#)[Documents](#)[Comments](#)

[Processed Donations](#)[Scheduled Donations for Gives Day](#)

- Adjust the information displayed by showing or hiding donation information in the dropdown menu on the right of the screen.
- Retrieve your donation information in a spreadsheet by clicking the 'Export' button on the right side of your screen. You'll be prompted to open this document as a downloaded file.
- To search for a specific donation, enter the last name of the donor in the corresponding search field.
- The Community Foundation will ensure that all donors receive an electronic receipt for their donation. If a donor contacts you for a receipt, you can generate a duplicate by clicking the 'Send Receipt' button to the right of the specific donation. This receipt will automatically be sent to the email address submitted when the donation was made.

Gives Day Donation

-- Show All --

Transaction Date

Equal

Last Name

Showing 9 record(s).

Export

Transaction Date Time	Anonymous	First Name	Last Name	
03/30/2017 02:35:03 PM	No	test	test	Send Receipt
03/30/2017 01:53:56 PM	No	test	test	Send Receipt

# Check Disbursement

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- 1) On or before June 13th, a statement will be emailed to your organization informing you of your grant amount.
- 2) Your organization will have ten business days to dispute this amount.
- 3) After ten days, if the amount has not been disputed, a check will be processed for your organization. The check will be mailed to your mailing address listed in your Midlands Gives profile.

# Check Disbursement

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Grant amount will include:

- Total amount of donations received on May 1st
- Plus any prize or regional bonus pool amounts (if applicable)
- Net of fees (4.9%)

Disbursement process will be complete and check mailed on or before June 30, 2018.

Please be patient! We perform a financial reconciliation on all transactions. To ensure accuracy, this process takes time.

# Additional Prize Updates

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# Prize Changes

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- The 2:00 PM Power Hour has been moved to 7:00 PM
- Each Aflac Power Hour has an individual name:
  - Aflac Rise and Shine Power Hour | 7:00 AM to 7:59 AM
  - Aflac Coffee Break Power Hour | 10:00 AM to 10:59 AM
  - Aflac Lunch Special Power Hour | 12:00 PM to 12:59 PM
  - Aflac Midday Mania Power Hour | 4:00 PM to 4:59 PM
  - Aflac Sunset Power Hour | 7:00 PM to 7:59PM
  - Aflac Night Owl Power Hour | 11:00 PM to 11:59 PM
- Nephron Champion Page Challenge: Pages must have a minimum goal of \$250.

# Elliott Davis Keystone Prize

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\$500 awarded to a small and large budget nonprofit that builds a strong foundation with the highest number of pre-scheduled gifts.



# of Prizes: 2 x \$500

# Regional Bonus Pools

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**Community Foundation for Orangeburg and Calhoun Counties** is sponsoring a **\$15,000** proportional bonus pool for nonprofit organizations in Orangeburg and Calhoun Counties. Eligible organizations will receive a proportional share of the bonus pool based on the amount raised by the nonprofit.

**Greater Chapin Community Endowment** is sponsoring **\$5,500** in matching funds for nonprofit organizations in the Greater Chapin area. Eligible organizations will receive a dollar for dollar match up to \$500.

**Kershaw County Endowment** is sponsoring a **\$2,500** bonus pool for nonprofit organizations in Kershaw County. Prizes will be awarded to eligible organizations according to who has the most unique donors. 1st Prize: \$1,000, 2nd Prize: \$750, 3rd Prize: \$500, 4th Prize: \$250

**Sumter Community Foundation** is sponsoring a **\$5,000** proportional bonus pool for nonprofit organizations in Sumter. Eligible organizations will receive a proportional share of the bonus pool based on the amount raised by the nonprofit.



# Reminders

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# Customer Service

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- Donors should be instructed to call your nonprofit first if they have any difficulties giving.
- If you cannot answer their question, please call the Midlands Gives team at 803.254.5601 or email [midlandsgives@yourfoundation.org](mailto:midlandsgives@yourfoundation.org)
- Receipts: Donors will automatically receive an email receipt. If they do not receive one, you can send them one from your donor information page.
- Transaction Issues: Donors should email [midlandsgives@yourfoundation.org](mailto:midlandsgives@yourfoundation.org)

# Scheduling Gifts

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- Scheduled giving opens April 17th
- Scheduled gifts do not count toward prizes
- Gifts will be charged to credit cards on May 1st
- Donors must create a donor profile to schedule a gift.

# Scheduling Gifts

**Donation Amount**

\* Amount

\$

USD

**Donation Type**

SCHEDULED DONATION

**Details**

Do you want your donation to be anonymous? *Your contact information will not be shared with the organization listed above.*

No ▾

\* Would you like add 4.9% to this donation to help offset the costs of processing your gift?

Yes ▾

This is the first time I am giving to this organization

Yes ▾

This gift is in memory or honor of *(optional)*

Additional Notes *(optional)*



# Scheduling Gifts

## Checkout

[ADD TO CART](#)[CHECKOUT](#)[THANK YOU](#)

### Donation Cart

Test Profile	Edit Remove	\$20.98 USD
Type: Gives Day Donation**		
Anonymous: No		

#### Important Note:

The "Today's Total" amount shown below reflects the amount that will be processed today. You will be charged the "Scheduled Total" amount on May 2nd and a tax receipt will be sent to the email address provided when each donation is processed.

SCHEDULED TOTAL	\$20.98
TODAY'S TOTAL	\$0.00

[ADD MORE NONPROFITS](#)[CHECKOUT](#)

Powered by **stripe**

### Common Questions

**Will I receive a receipt for my donation?**  
Yes, you will automatically receive an on-screen acknowledgment and an e-mailed receipt for your 100% tax deductible donation. Every nonprofit organization profiled on this site is recognized by and is in good standing with the Internal Revenue Service.

**Is there a fee on donations?**  
As with any credit card transaction, there are the typical transaction fees assessed by the credit card companies as well as technology costs to execute

# Match Reminders

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**What are Matches?** Funds that are raised *by your organization* to help challenge your donors and the organization to raise a certain amount.

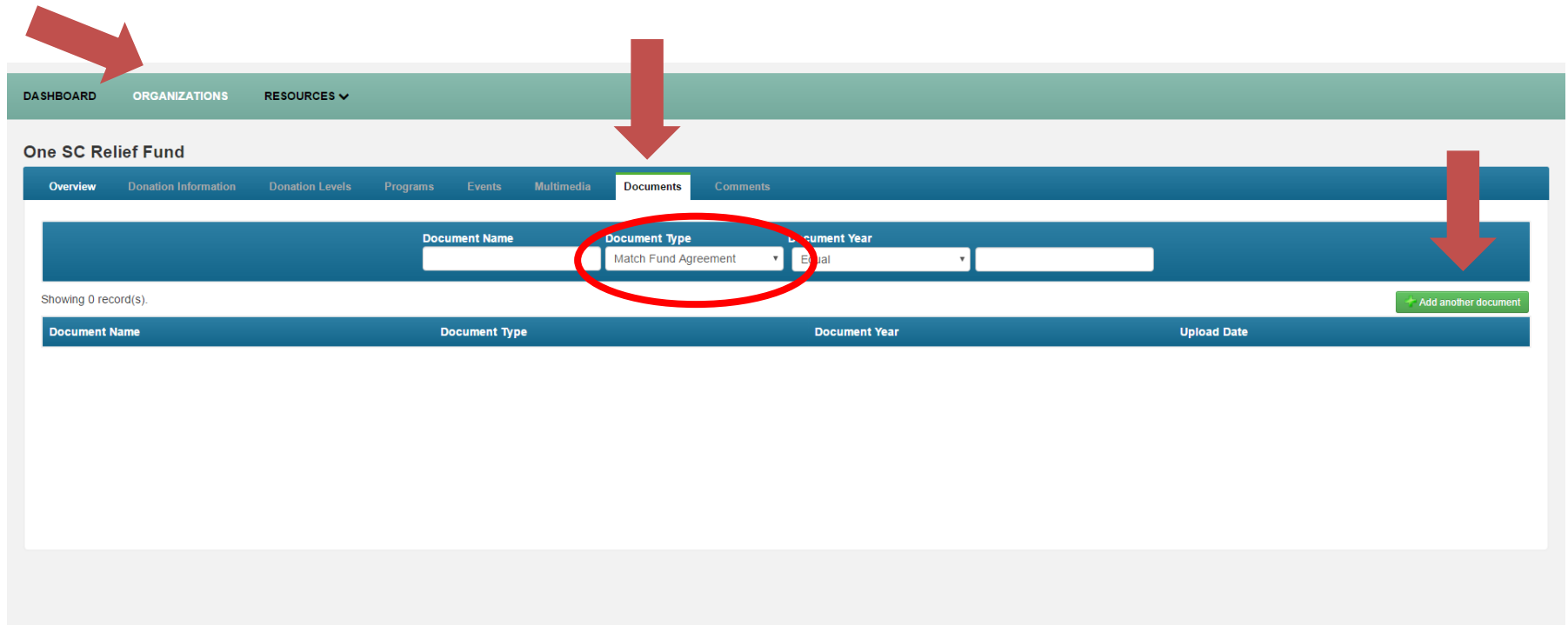
Matches are not provided or coordinated by the Midlands Gives team.

- Nonprofits can choose one of two options as criteria for their match:
  - A dollar for dollar match
  - Participation/Unique Donors
- The minimum amount of matching funds is \$1,000. Your organization can have more than one source of funds to reach the minimum amount. If your organization raises less than \$1,000, it can be given directly through the website during the event, rather than used as matching funds.
- Matches must be coordinated by the nonprofit and donor(s). The funds will be given directly to the nonprofit and will not go through the online platform or the Community Foundation.

# How To Verify A Match

Submit the Matching Gifts Form under “Documents” in your Midlands Gives Dashboard.

THE MATCHING GIFTS FORM MUST BE SUBMITTED BY APRIL 27TH



The screenshot shows the Midlands Gives dashboard for 'One SC Relief Fund'. The top navigation bar includes 'DASHBOARD', 'ORGANIZATIONS', and 'RESOURCES'. Below this, the 'Documents' tab is selected, and a red arrow points to it. The 'Document Type' dropdown menu is circled in red, showing 'Match Fund Agreement'. A red arrow also points to the 'Add another document' button. The table below shows no records.

Document Name	Document Type	Document Year	Upload Date
Showing 0 record(s).			

# Donor Information

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- NPOs can track donor gifts in real time using the dashboard in your profile.
- Use donor information to thank them throughout the day and after the campaign. Also to stay in touch with them throughout the year.
- Do not share donor information with non-essential staff, your board or other groups.

# Profile Password

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- Make note of your profile password BEFORE May 1<sup>st</sup>. You will not be able to reset your password on May 1st!

# Headquarters

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Come to Headquarters to:

- Cheer on local television broadcasts
- Receive assistance making an online donation
- Take a selfie at our photo booth
- Cheer on Mayors during Nephron Putting Challenge
- View SCSM's exhibits – free admission on May 1<sup>st</sup> with Midlands Gives donation receipt

Schedule of events can be found at  
[www.midlandsgives.org/headquarters](http://www.midlandsgives.org/headquarters)



# Communication Reminders

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- Make sure you are using this year's date and graphics in your promotions (Found on toolkits page)
- Use #MidlandsGives on social media
- Visit headquarters to cheer on live television
- Begin communicating about Midlands Gives now, increasing frequency as we get closer to the event
- Remember the Midlands Gives Media Policy
- Have fun, be creative, and use the resources we have provided you
- Remember – you don't have to do it all!





# T-shirts

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Prices range from \$7.50 - \$10.00 depending on size and style

T-shirts can be purchased at Central Carolina Community Foundation's office during the following hours:

Monday – Thursday: 8:30 AM to 5:00 PM

Friday: 8:30 AM to 3:00 PM

Shirts will also be available for purchase at Headquarters on May 1<sup>st</sup>.

Exact Cash, Check or Credit Card Accepted



# What's Next?

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- ☐ Mark your calendar with the key dates listed on the next page.
- ☐ Join the [Midlands Gives NPO Learning Exchange Facebook Group](#) to connect with your peers and ask your questions about Midlands Gives
- ☐ Submit your matching gift form by April 27<sup>th</sup>
- ☐ Encourage donors to set up Champion Pages. Review and approve them by April 27<sup>th</sup>.
- ☐ Visit the Toolkit page to view training slides, recordings and marketing materials.
- ☐ Implement your communication plan during the month of April
- ☐ Create a day of plan for May 1st, including staffing and communication.

# Mark Your Calendar

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Date	Event
April 1, 2018	Event Promotion Begins
April 17, 2018	Scheduled Giving Opens
April 27, 2018	Matching Gift forms due
April 27, 2018	Deadline to approve Champion Pages
May 1, 2018	Midlands Gives Day!

# Where to Find...

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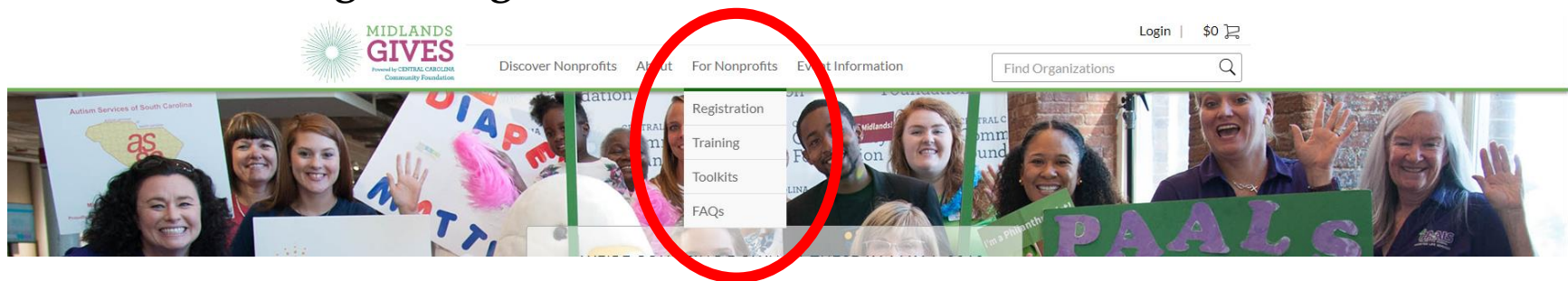
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# Additional Resources/Toolkit

[www.midlandsgives.org/](http://www.midlandsgives.org/)



# Where Can I Find These Slides?

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1. Go to [www.midlandsgives.org](http://www.midlandsgives.org)
2. Click “Toolkits” in top header
3. Look for slides under ‘Training Resources’

\*Link to recording will be available in same location and in your CiviCore dashboard under “Resources”



# Questions?

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**Thank you!**

*For Midlands Gives FAQ's, please visit:*

[www.midlandsgives.org/info](http://www.midlandsgives.org/info)

*For additional questions, please join our*

[Midlands Gives NPO Learning Exchange on Facebook](#)

*or contact:*

Nancye Bailey, Midlands Gives Coordinator

[midlandsgives@yourfoundation.org](mailto:midlandsgives@yourfoundation.org)

call 803.254.5601 and press #4

