

Midlands Gives Logistics Webinar #4

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MIDLANDS
GIVES

Powered by CENTRAL CAROLINA
Community Foundation

midlandsgives.org

Presenters



Nancye Bailey
Midlands Gives
Coordinator



Cherise Arrendale
Strategic Initiatives &
Communications Manger

Agenda for Today's Webinar

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

Your Profile

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Edits to your Profile

- The deadline to make edits to your profile was Friday, March 31
- You still have the ability to upload the matching gift forms to your profile – deadline is April 25
- You can also still upload information under the Events section until April 25th

Donate NOW Button

- On May 2nd, 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

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

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

T-shirts

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T-shirts

- Show your Midlands Gives spirit with our 2017 T-shirts.
- Orders must be made by Sunday, April 9, 2017.
- Choose from two designs and colors:



Front



Back



Front



Back

- Order your t-shirts [HERE](#)
- Price: \$8.00 to \$10.00 depending on size and style

Nephron Hoops Challenge

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Nephron Hoops Challenge

Encourage your local Mayors or Council Chairs to participate!

11:45 AM contest at South Carolina State Museum

\$250 added to a nonprofit selected by a Mayor or Council Chair who successfully makes a free throw shot during the contest.

A total of 40 prizes are available, totaling \$10,000

Mayors can register to participate [here](#) through April 18th.



Crisis Plan

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Crisis Plan

What constitutes a crisis:

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

Crisis Plan

We do not anticipate a repeat of 2016, but in the event the system does have some 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

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 (Site Status Page)
4. Email

Crisis Plan

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

<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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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

midlandsgives.org



Refunds

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

How to request a refund:

Send an email to midlandsgives@yourfoundation.org with the following information:

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

Receipts

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

- 1) On or before June 12th, 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.

Check Disbursement

Grant amount will include:

- Total amount of donations received on May 2nd
- Plus any prize or regional bonus pool amounts (if applicable)
- Net of fees (4.9%) and \$20 training fee

Disbursement process will be complete and check mailed on or before June 30, 2017.

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

Reminders

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Customer Service

- 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
- 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

Scheduling Gifts

- NEW this year
- Scheduled giving opens April 18
- Scheduled gifts do not count toward prizes with the exception of the AFLAC Inspires Leadership Prize
- Gifts will be charged to credit cards on May 2nd
- 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

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.

What are Prizes? Incentives funded by local businesses that all participating nonprofits have the opportunity to win. Prizes are coordinated by the Midlands Gives team.

You can find the full list of Prize on the “Prizes” tab of MidlandsGives.org



Match Guidelines

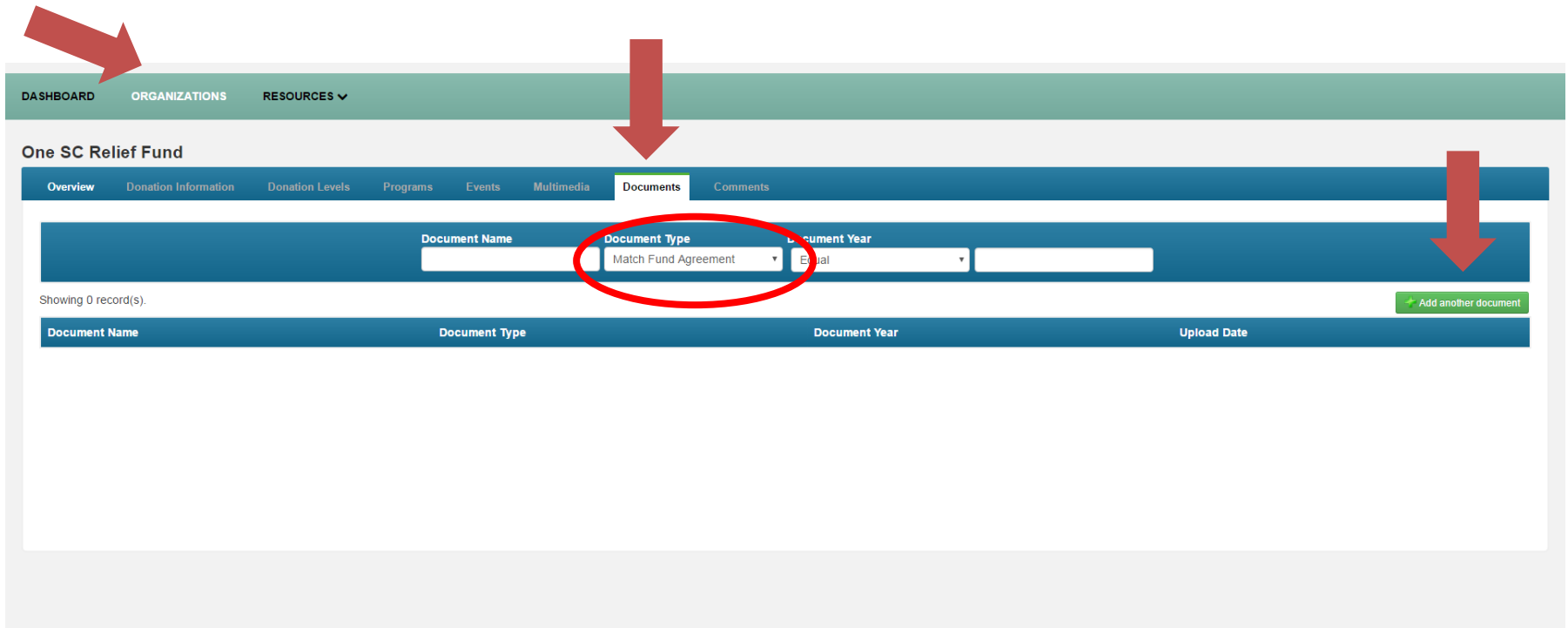
- Nonprofits are eligible to promote one match incentive on their profile during Midlands Gives. However, multiple donors can contribute to the total match amount.
- Nonprofits can choose one of two options as criteria for their match:
 - A dollar for dollar match
 - Participation/Unique Donors
- The 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.
- The availability of these funds will be promoted on your organization's Midlands Gives profile and shown on the leaderboard during the live event.
Funds will be listed once verified by 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 25TH



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. The 'Document Type' dropdown menu is circled in red and set to 'Match Fund Agreement'. A red arrow points to the 'Documents' tab, and another red arrow points to the 'Add another document' button.

Document Name

Document Type

Match Fund Agreement

Document Year

Equal

Showing 0 record(s).

Add another document

Document Name	Document Type	Document Year	Upload Date
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Donor Information

- 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.

Headquarters



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 Hoops Challenge
- Celebrate with the community at the Parking Lot Picnic

Headquarters May 2nd Schedule

4:30 AM to 10:00 AM Cheer for Local Television Broadcasts

11:45 AM to 12:30 PM Nephron Hoops Challenge

12:00 PM to 12:30 PM Cheer for Local Television Broadcasts

4:00 PM to 7:30 PM Cheer for Local Television Broadcasts

4:30 PM to 7:00 PM Midlands Gives Parking Lot Picnic

10:00 PM Cheer for Local Television Broadcasts

*Note: There will NOT be a nonprofit marketplace at Headquarters this year.



Headquarters

Free celebration event open to the public.

Join us for food, music and more!



Toolkit

Found at www.midlandsgives.org under “Toolkit”



Where Do I Find Help?

1. Visit MidlandsGives.org and click on *Info for Nonprofits*. There you will find helpful information and links.
2. If you still have questions, we encourage you to ask them in the Facebook group.
3. Still have questions? Send an email to midlandsgives@yourfoundation.org

What's Next?

- ☐ Mark your calendar with the key dates listed on the next page.
- ☐ Order Midlands Gives t-shirts by April 9th
- ☐ Submit your list of board members to the Midlands Gives team for the Aflac prize by April 18th
- ☐ Submit your matching gift form for verification by April 25th
- ☐ Visit the Toolkit page to view training slides, recordings and marketing materials.
- ☐ Create a day of plan for May 2nd, including staffing and communication.
- ☐ Begin implementation of communication plan
- ☐ Begin planning how you will thank donors after May 2nd

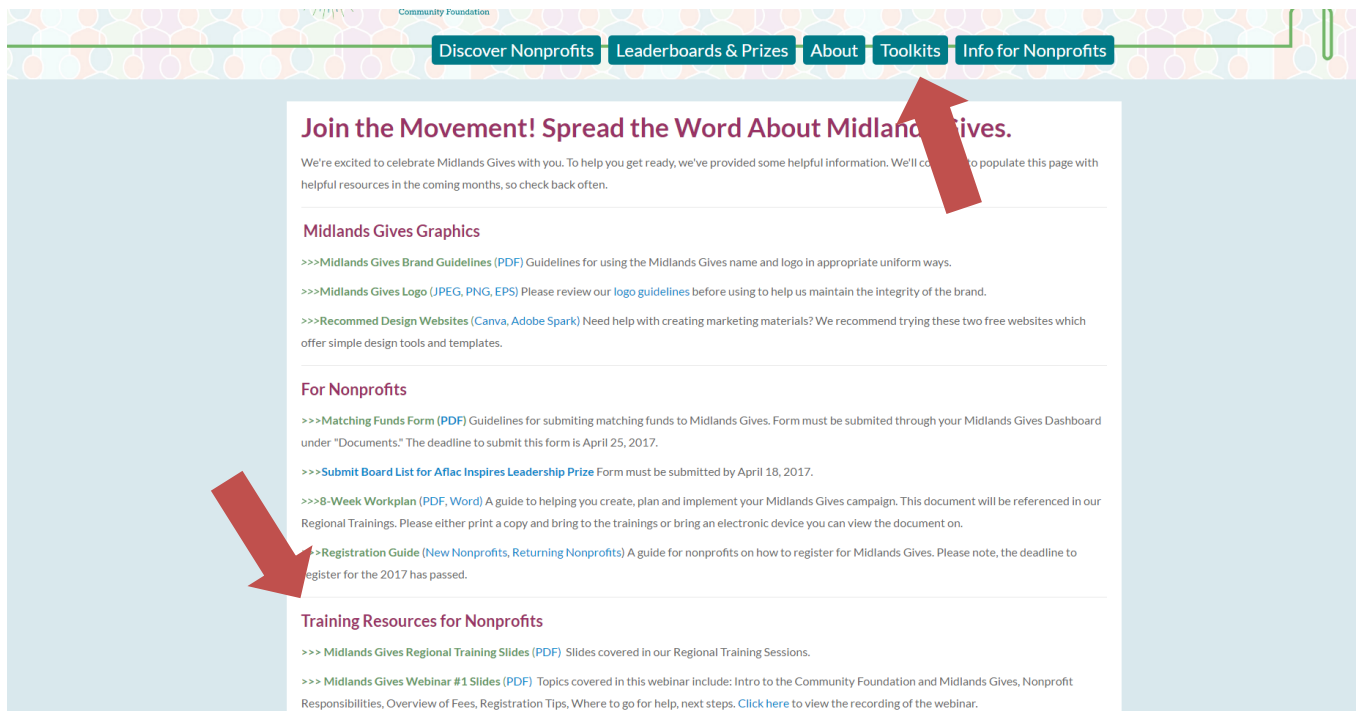
Upcoming Deadlines

April 1, 2017	Event Promotion Begins
April 5, 2017	Interview Interest Forms Due
April 9, 2017	T-shirt Order Forms Due
April 18, 2017	Scheduled Giving Opens
April 18, 2017	Board List due for Aflac Inspires Leadership Prize
April 25, 2017	Deadline to Submit Matching Gifts Form
May 2, 2017	Midlands Gives Day!

Where Can I Find These Slides?

1. Go to 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



Questions?

Thank you!

For Midlands Gives FAQ's, please visit:

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

call 803.254.5601 and press #4

