The Giving Block
A SHIFT4 COMPANY

GIVING EXPERIENCE

A STEP-BY-STEP GUIDE

FOR MAXIMIZING

CRYPTO, STOCK +
DONOR ADVISED FUND
GIVING EXPERIENCES

DURING YEAR END FUNDRAISING

Table Of
Contents

Intro & Instructions

Overview of the toolkit, our Free for Life Promo, and the 2023 vision.

Our Mission in 2023

RE-OPEN DOORS

Re-open doors to your crypto giving option for both new and existing donors.

1

2

DONORS <50

Grow Stock and Donor Advised Fund revenue from investors under 50 (while preserving the hands-on giving options that high-impact legacy donors love).

3

UNCOVER HIDDEN DONORS

Create and capitalize on opportunities for the millions of hidden crypto and stock investors in your audiences to give.

DAF GRANTS: MAKE THE ASK

4

Over 96% of Donor Advised Funds go ungranted every year. You need to ask!

Motivate DAF donors to make grants NOW, not 20 years from now.

5

GREAT WEALTH TRANSFER

9 in 10 millennial millionaires are crypto traders, and the average stock investor is getting younger every year. Leverage modern crypto, stock and DAF giving to grow through this Great Wealth Transfer, not get left behind by it.

FREE FOR LIFE

RAISE MONEY

OR IT'S FREE FOR LIFE

2023 Offer: Raise Money, or It's Free for Life

We're putting our money where our mouth is.

Clients who complete the fundamentals this end of year, and don't see positive returns, will receive our Crypto, Stock and DAF solutions suite at zero subscription cost - **FREE FOR LIFE**.

Either your organization gets more donation revenue (win) or free fundraising solutions (win). Details here.

What Happened in 2022?

Crypto Donors Stepped Up
2022 was our second best fundraising year of all-time. Crypto donors continue to give, and we responded to requests from young donors to add easier Stock and DAF giving options.

However, it was also our most disappointing year in terms of client participation, as we saw many nonprofits take a step back from crypto fundraising despite the continued giving. (Read the 2023 Annual Report)

2022 Highlights

The crypto community grew in 2022, as more investors and more developers joined the community.

The average crypto donation was nearly 31 times larger than the average online gift size.

The Giving Block passed $125,000,000 in all-time crypto donations, with the largest donation being $9.4M.

2022 Lowlights

	2018-21	2022
On Website	★	★
On Social Media	★	✕
In Emails	★	✕
In Direct Mail	★	✕
At Events	★	✕

But Nonprofits Stepped Back
We expected a step back from public appeals to "Donate crypto!". The FTX collapse was scary, and many nonprofits didn't think it was a great time for an all-in crypto fundraising campaign. We understood the concerns and prepared to navigate them together.
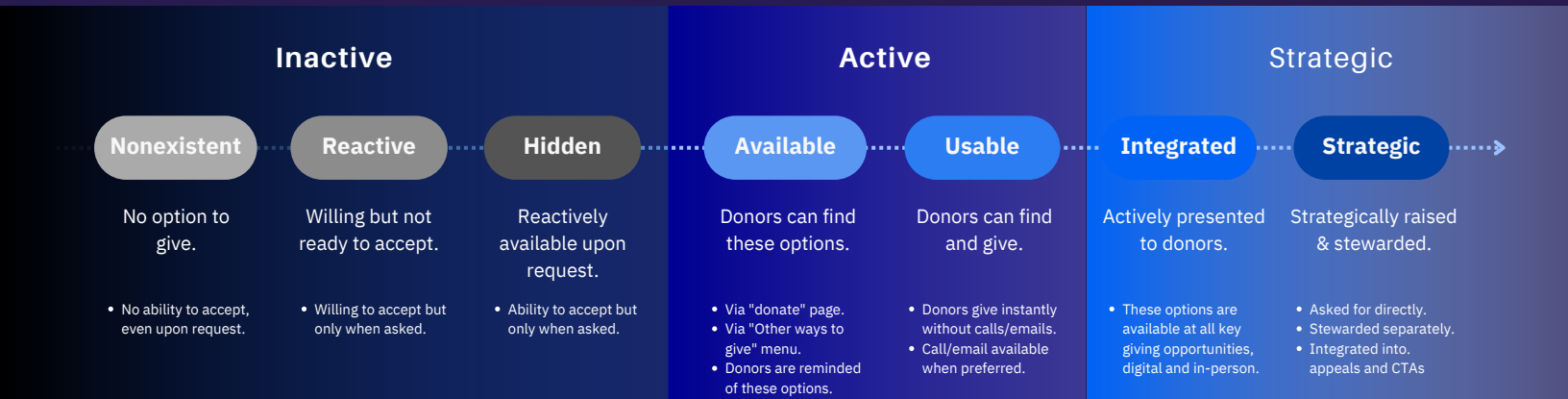
What we didn't expect was for some nonprofits to stop putting the crypto option in front of donors entirely, which closed their doors to crypto donors altogether.

This created a story of "haves" and "have nots", as our long-standing clients raised money, while some clients didn't stand a chance.

Introduction
How Nonprofits Win

We audited the websites and strategies of our client base, and we discovered that our clients fell into three categories: **Inactive**, **Active** & **Strategic**. We looked at which clients were doing the fundamentals (or skipping them), and defined what separated the good from the bad.

Inactive			Active		Strategic	
Nonexistent	**Reactive**	**Hidden**	**Available**	**Usable**	**Integrated**	**Strategic**
No option to give.	Willing but not ready to accept.	Reactively available upon request.	Donors can find these options.	Donors can find and give.	Actively presented to donors.	Strategically raised & stewarded.
• No ability to accept, even upon request.	• Willing to accept but only when asked.	• Ability to accept but only when asked.	• Via "donate" page. • Via "Other ways to give" menu. • Donors are reminded of these options.	• Donors give instantly without calls/emails. • Call/email available when preferred.	• These options are available at all key giving opportunities, digital and in-person.	• Asked for directly. • Stewarded separately. • Integrated into appeals and CTAs

Here are the largest differences we found between successful and unsuccessful nonprofits:

#1) Whether or not donors could easily find these options and give on their website. (Explained: If donors can't find the option and give, they don't give.)

#2) Whether or not they put the crypto, stock and DAF options in front of donors. Think newsletter footer, an insert in Direct Mail, QR code at walk or gala, etc. (Explained: The more donors see the options, the more likely they are to give.)

#3) Whether or not they actively solicited crypto, stock and DAF (Explained: Donors who saw the giving options consistently throughout the year responsed to direct appeals to "Donate Crypto" or "Donate Stocks" at end of year)

Average Raised
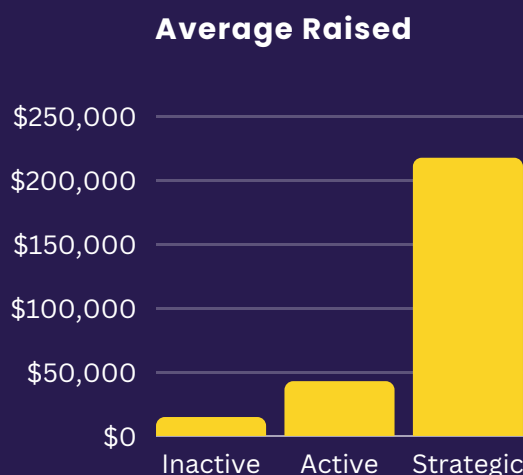
Inactive (Non-Existent ⟶ Hidden)
- Hard/Impossible to find + give these options on website
- Options excluded from fundraising efforts (emails, direct mail, etc.)

Active (Available ⟶ Usable)
- Easy to find and give these options on website
- Options are sometimes put in front of donors proactively

Strategic (Integrated ⟶ Strategic)
- Easy to find and give these options on website
- Integrated into existing fundraising efforts (emails, mail, campaigns, etc.
- Capitalizing on new donor/dollar opportunities (TGB campaigns, matches, etc.)

Introduction
Why We Added Stock & DAF Giving

If young donors had to call and email you to give with credit cards, don't you think that would impact your fundraising?

Nonprofits spend a ton of time engineering the perfect giving experience for credit card donations ($128 Average), but not for non-cash assets ($5,000+ Average). We don't think that makes sense.

Before we started nonprofits didn't have a crypto option that was A) easy to find, B) easy to give and C) actively put in front of donors. We fixed those problems, and have been the most successful crypto fundraising platform as a result.

The keys to successful stock and DAF fundraising are no different than crypto (or credit cards for that matter). If I'm a donor under 50 the giving experience I expect is that you show me the giving option, I click, then give directly through your site. If you don't show donors the options via emails, at events, direct mail, they won't consider them. And if you send me brokerage instructions, I'm going to leave your site, go to charityvest and park my money in a DAF for 30 years. Because...well...nonprofits that make giving difficult for no reason lose to nonprofits that make it easy. Here's a breakdown:
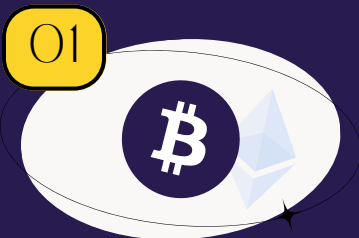
01 WHY CRYPTO?

Millions of young, high net worth donors are incentivized to give crypto over cash. We created The Giving Block to help nonprofits fundraise crypto, and have raised over $125,000,000 doing it.
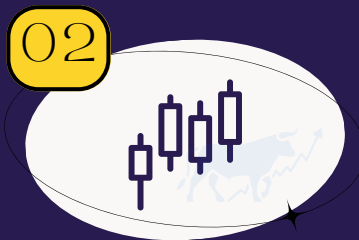
02 WHY STOCKS?

Just like crypto, there are also millions of young, high net worth donors incentivized to give stocks over cash. But most nonprofits don't ask for stocks. In fact, there's often no feasible way for young donors to give stocks on nonprofit sites without emails, phone calls, etc. We're going to open your doors for young stock donors.

03 WHY DONOR ADVISED FUNDS (DAFs)?

Unfortunately, because nonprofits haven't made it easy to donate investments (crypto, stocks, etc.), donors have parked nearly $250 Billion in Donor Advised Funds. That means 96% goes ungranted each year. We're going to help you actively tap into that $250B while leveraging your direct crypto and stock giving options to ensure that less gets trapped in DAFs moving forward.

INSTRUCTIONS

Instructions for completing the key actions in your Giving Experience toolkit.

I
ASSESS

1. AUDIT YOUR GIVING EXPERIENCE

Complete your "Audit" Giving Experience Checklist, assessing the current state of your giving experience for crypto, stock and/or DAF. This checklist tells you what's working, what's broken, and what you intend to fix.

II
FIX

2. FIX YOUR GIVING EXPERIENCE

Improve your giving experience using the resources in the toolkit. Learn what makes a great giving experience, and what stops giving in its tracks. See what has the biggest impact on discoverability, donor conversion, average gift size, retention and more.

Depending on your package, you'll have office hours, workshops and or a personal strategist to help you complete the items on the checklist.

III
FINALIZE

3. SET YOUR FUNDRAISING PRIORITIES

Once your giving experience is ready for primetime, you're ready to tackle End of Year fundraising strategies. Complete the "Fundraising Priorities" Checklist to let us know which strategies we can help you tackle this end of year. This will also be your guide to Part 2 of the toolkit, telling you which strategies to use, and which to skip.

IV
GAMEPLAN

4. FINALIZE YOUR 2023 GIVING EXPERIENCE

When you lock down your site for End of Year 2023, complete the "2023 Final" Giving Experience Checklist. It's the same checklist as before, but it shows us what you got done, and what we'll need to continue work on in 2024.

V
FUNDRAISE

5. START FUNDRAISING (TOOLKIT PART 2)

Part 2 of the toolkit is all about fundraising. This covers our Match Dollar Pools for crypto/stocks/DAFs, key campaigns like Crypto Giving Tuesday, and provides templates for maximizing your fundraising across social media, email, direct mail, and beyond. This year, we'll also have chatGPT prompts that allow you to generate custom content in a flash!

INSTRUCTIONS

How the checklists work.

Checklists are provided throughout our End of Year Toolkits. These checklists help you save time by prioritizing what's important.

If you're currently in the middle of creating/updating your giving experience, or fundraising strategies, these should assist with that, and are not meant to displace existing efforts. If you have any questions about this, contact us!

✅	**We Have It**	Skip these parts. You're done!
🛠️	**High Priority**	Complete these items **first**.
🛠️	**Low Priority**	Complete **only** after high priority items.
❌	**Not a Priority**	Skip these parts in the toolkits.

I

Audit Your Experience

Assess the current state of your giving experience, and what's killing conversion.

I

Instructions

INSTRUCTIONS

- We know EOY can be overwhelming, so we made this part easy.
- This audit of your giving pages allows you to prioritize what matters most.
- While completing this section, think about what you can get done this year, and what will have to wait until 2024.
- Complete the checklists for each tool you're using here at The Giving Block.
- If you don't have the time or resources this year to work on your website, directing donors to your profile on The Giving Block is a backup option (however, this is not preferred).

Audit Checklists

Download
My Checklist

☈ CLICK HERE

Instructions
1. Download this document to your device (Button Above)
2. Complete the checklists that apply to your organization
3. Save or Export to save your selections in the document
4. Submit your Checklist(s) **here** to complete this step

Preview

PRIORITIES CHECKLIST
Crypto Audit
AUDIT YOUR EXPERIENCE, AND DECIDE WHAT TO IMPROVE.

PRIORITIES CHECKLIST
Stock Audit
AUDIT YOUR EXPERIENCE, AND DECIDE WHAT TO IMPROVE.

PRIORITIES CHECKLIST
DAF Audit
AUDIT YOUR EXPERIENCE, AND DECIDE WHAT TO IMPROVE.

II

Fix Your Giving Experience

Step-by Step Guide to maximize conversion and gift size via your donor experience.

II

Instructions

Use the guides in this section to optimize the crypto donor experience for:

- **Higher Conversion Rates**
- **Increased Average Gift Size**
- **Higher Donor Retention**

In this section, we guide you through all of the simple changes you can make that have the highest impact on converting donors. For your donors, it should be:

1

EASY TO **USE**

Donors can send you gifts in a few clicks, and understand the process.

2

EASY TO **CARE**

Donors are told clearly why they should give this donation method TODAY.

3

EASY TO **FIND**

Donors will easily discover the option when looking for ways to support you.

1

EASY TO **USE**

Is my Giving Experience easy for donors?

Your website should be structured so that any user can navigate them quickly and easily the first time.

The main places donors access your crypto, stock and DAF giving pages are:
- At the top of your website
- On your "Donate" page
- On your "Ways to Give" page and dropdown menu

If these items are difficult to locate, or missing entirely, it's time improve your navigation.

Click the yellow buttons below to take you to our guides for ensuring your menus are easy to navigate, your footers help your SEO, and your other ways to give includes every single method of giving that you have on offer.

Afterwards, we recommend that you test your website with a first time user.

*Your org may call this menu something different like "Get Involved", though this is not recommended.

Example of a Great "Donate Crypto" Page

INSTRUCTIONS

Goal: Giving from your pages should be easy to understand, and easy to execute.

Review the Example Page, then use the Guide Buttons at the bottom of this page to make the priority improvements you identified in your checklist.

Easy to Give Automatically

- ☑ On-Page Giving Form is Easy Access
- ☑ Crypto is First (or Only) Giving Option

Easy to Understand the Process

- ☑ Automatic Option Explained
- ☑ Hands-On Option Explained
- ☑ Donor: "After I give, what happens?"

Easy to Give Manually ☎

For Stocks, DAFs (and some crypto gifts), certain donors like talking to a person and giving manually. Always provide a link to The Giving Block's "Private Donor Services" team on your giving pages to ensure these high-value donors convert.

Click Buttons to Access in the Knowledgebase

🛠 **START FIXING**

Crypto Page Guide

Stock Page Guide

DAF Page Guide

EASY TO **CARE**

Does my giving page make my donor care?

Often, non-cash asset donors such as those using cryptocurrency are younger and this may be their first time visiting your website. They are often motivated by cause first, and organization second.

Your goal should be to provide the donor with as much impact and mission related messaging that they are able to make their donation without moving off the page.

At a bare minimum all of your donation pages, should tell the prospective donor why they should care about your mission, what is the benefit to them of donating using the asset (i.e. tax language if applicable) and what is the impact of donating now (urgency).

Repeat this on all of your donation pages if you have them such as:
- Donate Cryptocurrency
- Donate Stocks
- Donate from your DAF/Donor Advised Fund

2

EASY TO CARE

DONOR: "WHY SHOULD I GIVE **NOW**?"

INSTRUCTIONS

Assume the donor is visiting your website to give for the first time. Why should they give? And, why should they give crypto, stock or from their DAF?

Provide enough information that the donor is able to make the decision to donate without navigating off it. Include brief information about your organization's mission, make the impact of their donation clear as well as why they should donate NOW.

Example of a Great "DAF" Page
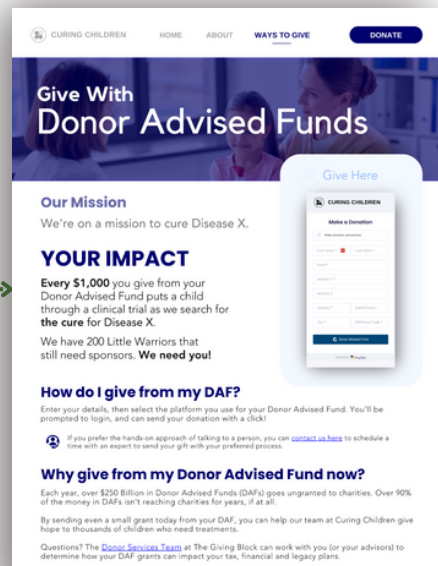
Example of a Great Stock Page
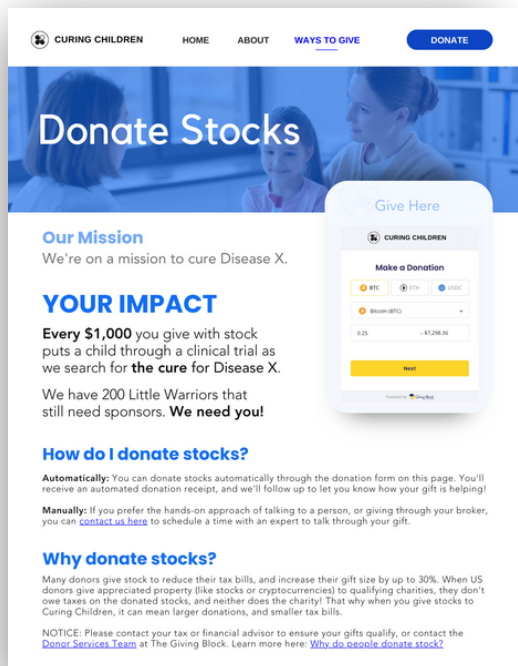
5 Why Support Us NOW?

- ✅ Mission Statement
- ✅ "X Dollars = X Impact" Statement
- ✅ Goal Statement

4 Why Give This Donation Method?

- ✅ Donor Benefits (Tax, Match $, etc.)

Click Buttons to Access in the Knowledgebase

START FIXING

| Crypto Page Guide | Stock Page Guide | DAF Page Guide |

3

EASY TO **FIND**

Is it easy for donors to find the right page?

INSTRUCTIONS

Your website should be structured so that any user can navigate it quickly and easily the first time.

The main places donors access your crypto, stock and DAF giving pages are:
- At the top of your website
- On your "Donate" page
- On your "Ways to Give" page and dropdown menu

If these items are difficult to locate, or missing entirely, it's time improve your navigation.

Click the yellow buttons below to take you to our guides for ensuring your menus are easy to navigate, your footers help your SEO, and your other ways to give increases every single method of giving that you have on offer.

Afterwards, we recommend that you test your website with a first time user.

*Your org may call this menu something different like "Get Involved", though this is not recommended.

EASY TO **FIND**

DONOR: "WHERE IS IT?"

FIX YOUR

"Donate" Page

① On My "Donate" Page, It's Easy To...

✅ Find crypto, stock or DAF on Desktop

✅ Find crypto, stock or DAF on Mobile

✅ Navigate to these options

② Available Options

✅ Cryptocurrency Option

✅ Stock Option

✅ Donor Advised Funds Option

STEP-BY-STEP GUIDE

Fix My
"Donate"
Page

☄ CLICK

Example of "Donate" Page with Clear "Other Ways to Give"

CURING CHILDREN

Donate

Other Ways to Give

Not giving with your card?

❯ **Bank Transfers**   ❯ **Cryptocurrency**

❯ **Stock**   ❯ **Donor Advised Funds**

Disease X impacts children everyday.
Your donations help us find the cure.

CURING CHILDREN

Make a Donation

| Once | Monthly | Annually |

| $45 | $100 | $200 |

| $500 | $2,500 | $5,000 |

$200

☐ Cover transaction fees (?)

Next

Powered by SHIFT④

EASY TO **FIND**

DONOR: "WHERE IS IT?"

3
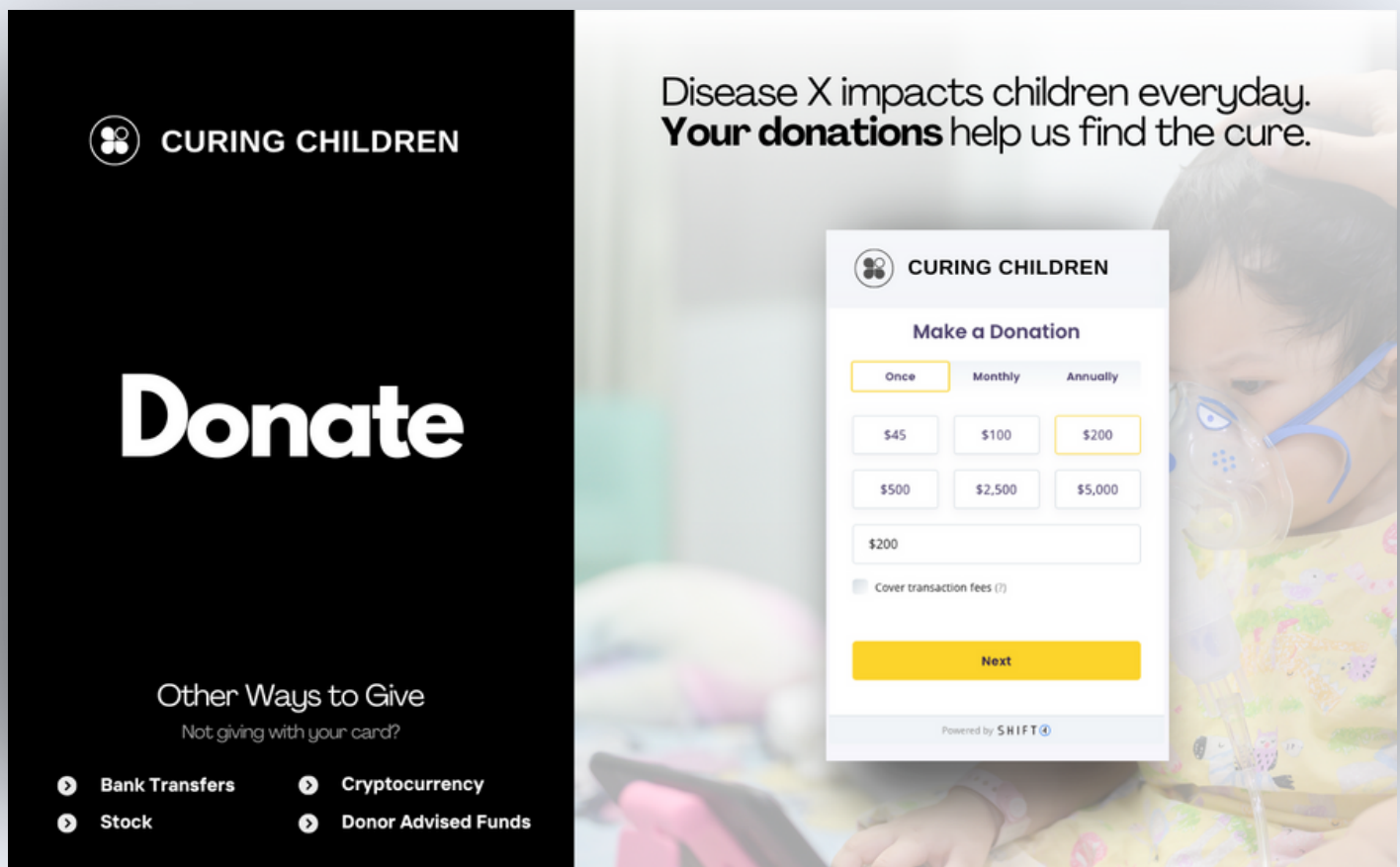
FIX YOUR

"Ways to Give" Page

1 On My "Ways to Give" Page, It's Easy To...

- ✅ Find crypto, stock or DAF on Desktop
- ✅ Find crypto, stock or DAF on Mobile
- ✅ Navigate to these options

2 Which Options?

- ✅ Cryptocurrency Option
- ✅ Stock Option
- ✅ Donor Advised Funds Option

Fix My
"Ways to Give"
Page

✦ CLICK

Example of " Ways to Give" Page

⟱

CURING CHILDREN   Our Work ⌄   About Us ⌄   **Ways to Give** ⌃   Donate ♡   ☰

Ways to Give

Giving Methods

- ▶ **Credit & Debit Cards**
  Give securely with your card
- ▶ **Digital Wallets**
  Apple Pay, GooglePay & Venmo
- ▶ **Cryptocurrency**
  Give crypto securely in a few clicks
- ▶ **Stock**
  Give stock directly in seconds

- ▶ **Monthly Giving**
  Sustain our work monthly
- ▶ **Send a Check**
  Mail a check to our office
- ▶ **Donor Advised Funds**
  Grant from your Donor Advised Fund account
- ▶ **Bank Transfers**
  Donate from your bank using ACH, Wire or Zelle

Get Involved

- ▶ **Run an Online Fundraiser**
  Give crypto to charity
- ▶ **Create a Walk Team**
  Stay up-to-date with the latest insights
- ▶ **Corporate Philanthropy**
  Partner with us to save children
- ▶ **Put Us in Your Will**
  Make us a part of your legacy

Meet the kids we're working for.

EASY TO **FIND**

DONOR: "WHERE IS IT?"

FIX YOUR

"Ways to Give" Menu

1 On My "Ways to Give" Page, It's Easy To...
- ✅ Find crypto, stock or DAF on Desktop
- ✅ Find crypto, stock or DAF on Mobile
- ✅ Navigate to these options

2 Which Options?
- ✅ Cryptocurrency Option
- ✅ Stock Option
- ✅ Donor Advised Funds Option

Fix My
"Ways to Give"
Menu

✦ CLICK

Example of "Ways to Give" Menu

⌄⌄

CURING CHILDREN

Our Work ⌄   About Us ⌄   **Ways to Give** ⌃   Donate ♡   ☰

Give Today
Ways to Give

- ➤ **Credit & Debit Cards**
  Give securely with your card

- ➤ **Digital Wallets**
  Apple Pay, GooglePay & Venmo

- ➤ **Cryptocurrency**
  Give crypto securely in a few clicks

- ➤ **Donor Advised Funds**
  Grant from your Donor Advised Fund account

- ➤ **Monthly Giving**
  Sustain our work monthly

- ➤ **Send a Check**
  Mail a check to our office

- ➤ **Stock**
  Give stock directly in seconds

- ➤ **Bank Transfers**
  Donate from your bank using ACH, Wire or Zelle

Help Us Grow
Get Involved

- ➤ **Run an Online Fundraiser**
  Give crypto to charity

- ➤ **Create a Walk Team**
  Stay up-to-date with the latest insights

- ➤ **Corporate Philanthropy**
  Partner with us to save children

- ➤ **Put Us in Your Will**
  Make us a part of your legacy

Discover the power of our work.

III

Finish the Toolkit

When you're done fixing up your pages, use this checklist to close out of work for 2023.

Then, decide your fundraising priorities for Year End 2023! This will be our guide as we work on strategies together.

III

Instructions

🕐 Estimated time to complete: 1**5 Minutes**

When you're done making edits to your Giving Experience, complete the checklist for your giving pages to mark your progress.
(For anything you couldn't get to this time, we'll use this checklist in 2024 to help you make further improvements!)

Then, complete the checklist in this section to decide which fundraising areas matter most to your organization. That way, you'll know what to tackle, what to skip and what to ask for help with. That's a lot easier than trying to do...everything.

💬 Questions? Contact support@thegivingblock.com

Finish the Toolkit!

Download My Checklist

☞ CLICK HERE

Preview

IV

Start Fundraising

Let's get fundraising.

Now that your giving experience is donor-ready, it's time to start inviting donors to it!

IV

Instructions

Still working on your giving experience? If so, make sure to focus on that until it's donor ready before starting on fundraising strategy.

Done making your donor experience awesome? Awesome! Then it's time to tighten up your Year-End strategy. Here are your next steps between now and the release of the next toolkit.

Strategy Clients

1. Connect with your Strategist at The Giving Block to review your Giving Experience to ensure it's fully optimized.
2. Then, if you haven't already, complete your OLAAF so our strategy team can finalize your tactical plan.
3. Done with both? You rock. That means your strategic plan is already well underway! Continue to prime your donorbase for crypto stock and DAF giving at year end, and executing on top priorities together.
4. You will receive early access to the next toolkit. When it comes out, you and your strategist will connect to get a jump on building content and integrating the opportunties into your already strong plan!

Entry-Level Clients

1. Not sure if your donor experience is ready for primetime? Talk to support! (email below)
2. After the release, leverage the templates and opportunities to build a killer End of Year fundraising plan for crypto, stock and DAFs.
3. Make sure to attend office hours, workshops and all client sessions to stay plugged into key strategies, as well as fundraising and match dollar opportunities.

Questions? Contact support@thegivingblock.com

Coming Soon
Part 2: Fundraising

FUNDRAISING

END OF YEAR TOOLKIT
PART 2
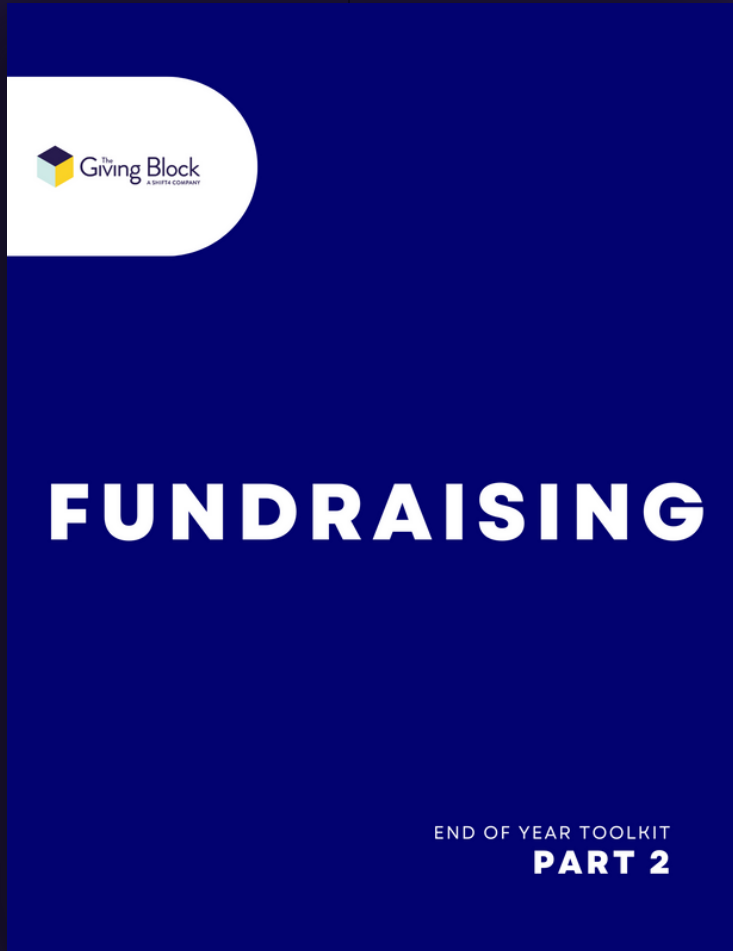
Make sure to get your giving experience finalized, because we're releasing the fundraising toolkit soon! The fundraising toolkit will provide...

- Details around match dollars for crypto, stock and donor advised fund giving!
- The 2023 Calendar, with vital fundraising dates and milestones
- Templates and AI prompts for crafting impactful donor appeals
- Guides for personalizing email and social media content
- And more to make your end-of-year successful

Need anything in the meantime? Check out the knowledge base, and if you can't find the answer contact us at support@thegivingblock.com.

CONGRATULATIONS! YOU
MADE IT TO THE END.

COMING SOON
PART 2:
FUNDRAISING STRATEGY

The Giving Block
A SHIFT4 COMPANY