

FUNDRAISING

END OF YEAR TOOLKIT
PART 2

Table Of Contents



Intro & Instructions	3
I. Plan with Calendars & Schedule	7
II. How to Earn Match Dollars	10
III. Activate My Tools & Features	12
Opportunity Analysis	13
Your Products	14
IV. Create Content	15
How to Use ChatGPT	16
Email	17
Social Media	18
V. Create Graphics	19
VI. Start Fundraising	21

Intro & Instructions

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

Welcome to The Giving Block's End of Year Fundraising Toolkit!

First, this toolkit ensures that you are ready to maximize your fundraising via:

- Calendar: Pacing yourself, and making the most of key fundraising opportunities
- Match Dollars: Match dollar pools specific to every donation method
- Tools: Making sure you're opening doors for donors to give Crypto, Stock, DAF & more.

Second, this toolkit provides you with AI prompts, templates and graphics to create killer end of year content that drives donor awareness, engagement and conversion!

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



Looking for Part 1 of the Toolkit?

[Download Here](#)

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

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

5



4

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



GREAT WEALTH TRANSFER

9 in 10 millennial millionaires are crypto investors, 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.

2023 OFFER

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](#).



Plan with Calendars & Schedule

Key Dates that Impact
Your Strategies

EOY Calendar

August September

22 – 30

Lock-In Website & Strategy

- Fix your website to ensure donors convert (toolkit part 1)
- Lock-in your Year-End fundraising priorities for crypto, stock & DAF
- Assess ways to integrate crypto, stock & DAF into your campaigns and events

October October

1 – 31

Build Content & Perform Donor Research

- Build your content for emails, social media, and segment your audience.
 - Understand your donor base to create targeted communication.
 - Segment your audience based on preferences, behavior, and giving potential.
 - Tailor communications to resonate with each segment effectively.

November November

1 – 27

Educate Your Audience

Prepare your audience for the upcoming opportunities to give crypto, stock and DAF.

- Recurring Donations:
 - Convert one-time donors to recurring donors.
 - Offer incentives or special recognition to encourage recurring donations.

November

28

#CryptoGivingTuesday

The biggest crypto philanthropy awareness day. Leverage match dollars and campaign-day attention to push for donors to give.

November December

29 – 6

Keep Donors Engaged

After Crypto Giving Tuesday, many donors who considered giving are still considering.

- Engage Board and Volunteers:
 - Actively involve board members and volunteers in fundraising activities.
 - Utilize their networks and influence to amplify your message.

December December

7 – 18

Year-End Giving

- Peer-to-Peer Fundraising:
 - Motivate supporters to become fundraising champions on your behalf.
 - Leverage their circles to expand your reach and gain more donors.

December December

19 – 31

Tax Deadline Countdown

- Get stock donations in before Dec 19, before brokerages close for the year
- Crypto and other donations can happen until midnight on December 31

January January

1 – 7

Thank You & Stewardship

Stewardship begins! Thank donors and show impact. Turn donors into sustainers!

January January

8 – 31

2024 Kickoff

Review 2023 learnings, kickoff improved 2024 approach!

KEY Dates

- 10/27** Post your #CryptoGivingTuesday “Save the Date”
- 10/31** Deadline (Recommended) for Website Changes
- 11/21** Last Week (Recommended) to Begin Audience Education on Giving Options (Crypto, Stock & DAF)
- 11/28** #CryptoGivingTuesday campaign day
- 12/18** Last week for stock fundraising appeals
- 12/19** Deadline for stock giving
- 12/31** Deadline for crypto giving



How to Earn **Match Dollars**

Information on 2023 matches

MATCH DOLLARS

Overview: Year-End Match Dollars

Beyond Crypto

Stock, DAF, P2P & More

This year, we're dedicating match dollars for all the donation methods we enable our clients to use, not just crypto.

All Donors Count

New & Existing Donors

All gifts get matched! Not just on TheGivingblock.com. Existing donors who give through our forms on your site get matched too.

Get Strategic

Work With Your Strategist

Most match dollars aren't earned with a tweet. Letting donors know in advance and using matches for key opportunities is crucial!

How to Qualify

Activate Your Tools!

Match dollars are available for nonprofits with giving pages for donations via...



Cryptocurrency



Stock



Donor Advised Fund (DAF) Grants



Credit Card Donations



Peer to Peer Fundraisers

Recent Matches



REMINDER

\$500K+

MAUI MATCH

\$500,000 in donations to Maui relief efforts are currently being matched dollar for dollar by Shift4 CEO Jared Isaacman! The next \$50k is being double-matched by the team at Ripple. See terms and details in the [FAQ here](#).

MATCHES EARNED IN 2022

\$9,400,000

In 2022, over \$9,000,000 in matches were earned by nonprofits on The Giving Block. We're working hard with partners to put together the best match pools possible this end of year!



Coming Soon: 2023 Match Amounts & Details

OFFICIAL MATCH POOLS TO BE ANNOUNCED IN YOUR CLIENT NEWSLETTER, THE MODERN PHILANTHROPY INSIDER. **MAKE SURE YOU'RE SUBSCRIBED!**



Activate My Tools & Features

How to Get the Most Out of Your
Features from The Giving Block

OPPORTUNITY ANALYSIS

The Giving Block's full product suite closes the gap for billions of dollars in missed giving opportunities.



\$250B

DAF Balances

There are over 1 Million DAFs in the US, with hundreds of billions of dollars waiting to be granted to charities.



\$6T

Annual Payments

More than 56 Million Americans use ApplePay. It is the preferred payment method for 17% of Americans.



\$1.1T

Market Cap

46 Million Americans invest in crypto. It remains the youngest & fastest growing investor community.

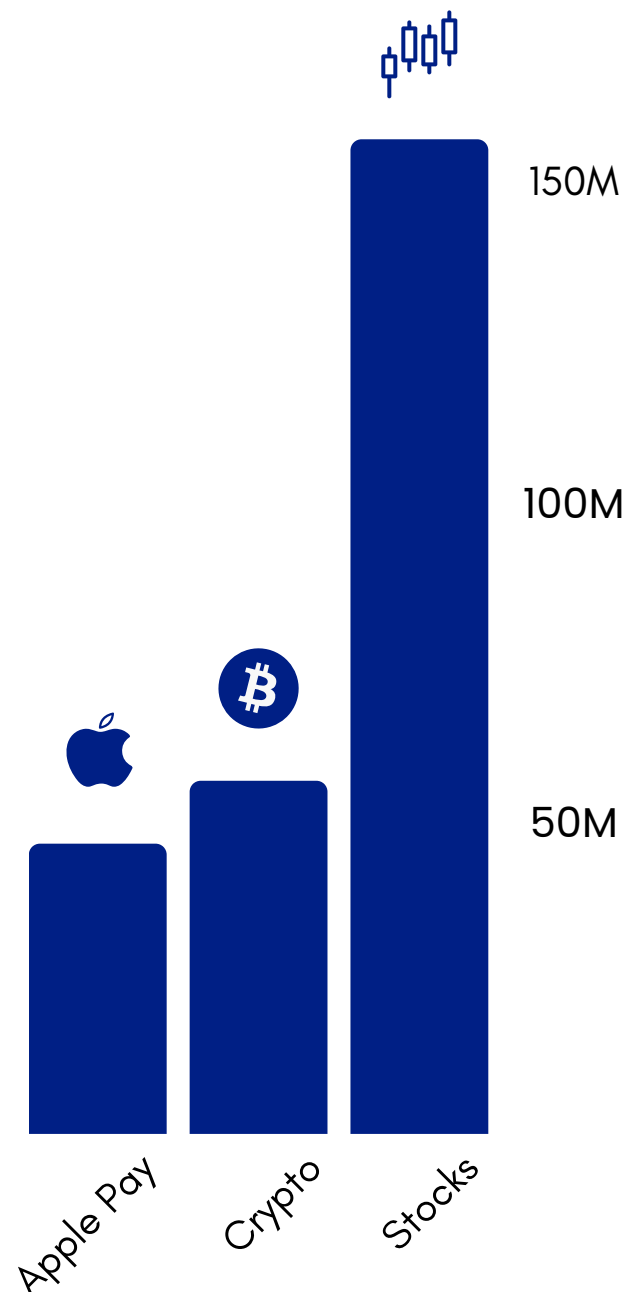


\$37.2T

S&P Market Cap

158 Million Americans have stocks. The median stock investor age is dropping rapidly from 48 to 35.

Total Users (USA)



YOUR PRODUCTS

*Every client, at every level, has access to our entire product suite!



Crypto Donation Tool

Donors can give every top crypto in seconds. Everything is fully automated.

How to Use

- Create your Crypto Giving Form in the Dashboard
- Paste the form on your "Donate Crypto" Page



Stock Donation Tool

No more emails & fax machines. Donors give in a few clicks - everything is automated!

How to Use

- Create your Stock Giving Form in the Dashboard
- Paste the form on your "Donate Stock" Page



DAF Donation Tool

Donors give from any DAF account in a few clicks, without leaving your site!

How to Use

- Create your DAF Giving Form in the Dashboard
- Paste the form on your DAF Giving Page



Peer to Peer Fundraisers

The only P2P solution with every modern giving option. Why settle for less?

How to Use

- Peer to Peer is open to any and all donors
- Direct donors to [Create a Fundraiser](#) instructions
- Support and promote the fundraisers!



Card Donations

Stop overpaying for basic credit card acceptance. Lower your fees, guaranteed.

How to Use

- Swap in Shift4 on the backend of existing donation pages using Cybersource or Authorize.net
- Or, create your own giving pages with Shift4
- Also, enable card for P2P fundraisers!



Apple Pay (Coming Soon)

Make it easier for young donors to give by enabling Apple Pay donations.

How to Use

- Contact [Amanda](#) at Shift4 to add Apple Pay to your donation forms!



Questions: support@thegivingblock.com

4

Questions: amanda.kean@shift4.com

IV

Create Content

Step-by Step Guide to using ChatGPT to automate the creation of custom email and social media messaging for non-cash asset donations



Estimated time to complete:
5 Min Per Message

How to Use ChatGPT

Using ChatGPT to build custom content.

Read Before You Begin

We Created Prompts for Nonprofits to Generate Custom Content

New AI powered tools like ChatGPT are the fastest and easiest way to create **draft** content for your social media posts and email.

Use Our Prompts to Generate a Draft in Seconds

Using the prompts we've provided, you can plug in details about your organization, and it will generate a great draft version of an email, tweet or other communication instantaneously.

Edit the Draft

These drafts are far better than a one-size-fits-all template we could otherwise provide. However, they aren't always perfect!



Questions? We can help!

And, as always, you have our team here at The Giving Block to help if you ever get stuck!

support@thegivingblock.com



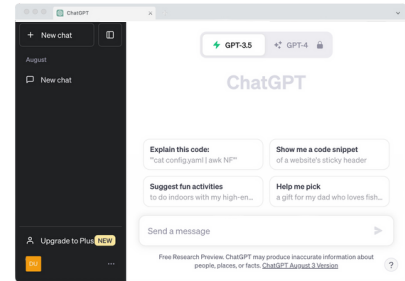
EMAIL

CREATE & CUSTOMIZE EMAILS

01

GO TO CHATGPT

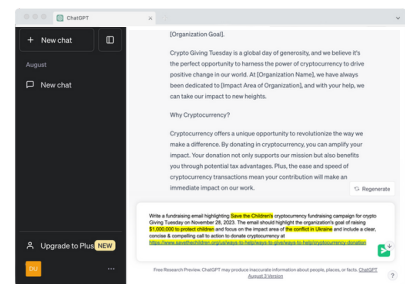
Log into chat.openai.com to use ChatGPT. Don't have an account? Click "Sign Up" and create a free one in seconds.



02

SELECT PROMPT & FILL-IN-THE-BLANKS

Copy & Paste one of our ready-made prompts (below) into ChatGPT, filling in the details about your nonprofit.



03

CUSTOMIZE!

Customize in ChatGPT (example: "Rewrite it but shorter" or "Rewrite it with humor"), or paste the draft into a doc and add your own personal touch!

**Click the button
to start building!**



**Create
Emails**



Questions: support@thegivingblock.com



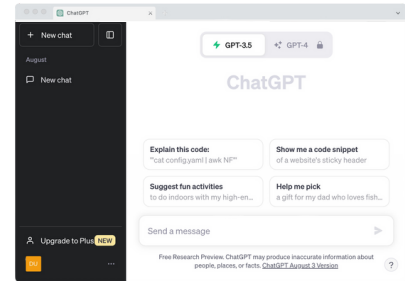
SOCIAL MEDIA

CREATE & CUSTOMIZE SOCIAL POSTS

01

GO TO CHATGPT

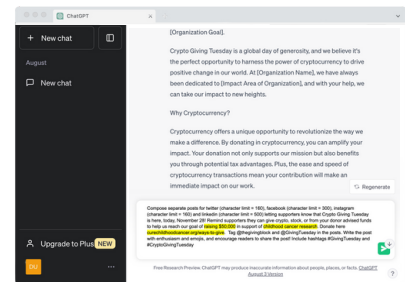
Log into chat.openai.com to use ChatGPT. Don't have an account? Click "Sign Up" and create a free one in seconds.



02

SELECT PROMPT & FILL-IN-THE-BLANKS

Copy & Paste one of our ready-made prompts (below) into ChatGPT, filling in the details about your nonprofit **and the character limits** for each platform.

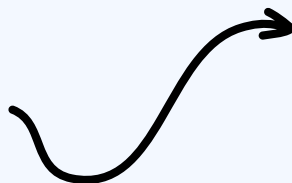


03

CUSTOMIZE!

Customize in ChatGPT (example: "Rewrite it but shorter" or "Rewrite it with humor"), or paste the draft into a doc and add your own personal touch to keep it on brand!

Click the button
to start building!



Create
Social Media
Content



Questions: support@thegivingblock.com



Create Graphics

Graphics curated by The Giving Block team for
use in end of year fundraising campaigns

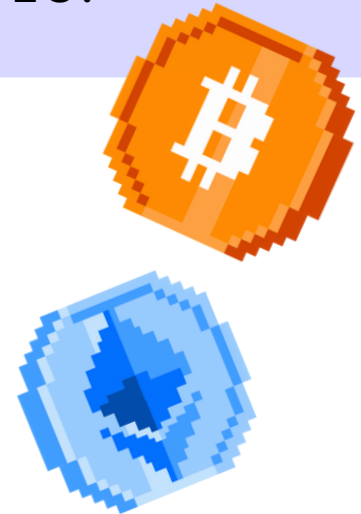


GRAPHICS

CREATE AMAZING IMAGES!



CRYPTO
GIVING
TUESDAY



WE'VE GOT EVERYTHING YOU NEED!

We have created a library of annual and evergreen content for end of year fundraising that will be constantly updated that includes:

- Logos of all supported cryptocurrencies
- Visual components for EOY campaigns including:
 - Social Media Assets
 - Profile Avatars
 - Postcards
 - Email & web assets

All of our graphics are available as templates in Canva, a free-to-use online graphic design tool. Canva is a simple drag-and-drop experience, making graphic design simple and easy for marketers & designers of all levels. You will need a free Canva account to access these files.

New to Canva? Learn the basics here:

<https://www.canva.com/designschool/tutorials/getting-started/>

Our graphics are also available as standalone assets that your team can edit in Photoshop, Illustrator or other design programs.



Access
Year-End & Giving Tuesday
Graphics Library

Access
Cryptocurrency
Graphics Library

Access
Stock & DAF
Graphics Library

VI

Start Fundraising

Done creating content? Awesome!
Let's start fundraising.

Stay in touch with The Giving Block
for strategies and updates!

CONGRATULATIONS! YOU
MADE IT TO THE END.



Questions: support@thegivingblock.com



^{The} Giving Block
A SHIFT4 COMPANY