

# Fundraising Success Activation Kickoff



2024

# Today's Hosts



**Antonicia Bishop**

**Client Support Manager**



**Kira Hale**

**Client Support Associate**

# What We'll Cover



- 01** Understanding Your Product & Services
- 02** Your Knowledge Base
- 03** Dashboard & Donations
- 04** Your Fundraising Journey & Foundation Setup Checklist
- 05** Ready, Set, Launch! 🚀🚀
- 06** Next Steps

# Housekeeping Reminders



- **Submit questions in the Q&A** as we go so we don't lose track of it in the chat
- You will have **access to this complete presentation deck**
- There will be a **dedicated Q&A at the end** so please be sure to stick around

# Your Product & Services

- ❑ A donation form that accepts crypto, stock, card, and donor advised funds (DAFs)
- ❑ Automatic donor receipts & tax documentation
- ❑ White glove Private Client Services
- ❑ 24/7 Access to donor data and reporting through your Dashboard
- ❑ Personalized donation profile page on The Giving Block's website
- ❑ Inclusion in Impact Index Funds, match funds & fundraising campaigns
- ❑ Access to integrations & partnerships and much more!



# Custom 365 Fundraising Plans



## Assessment

The process begins with you and your team completing a survey so we can get a clearer profile of your organizational strategy and needs.



## Customization

Our team of expert strategists will then analyze your survey data and develop a tailored annual non-cash asset fundraising plan to guide your organization forward over the next year.



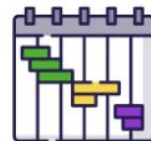
## 1:1 Meeting

Your strategist will then personally deliver your 365 Fundraising Plan in an interactive virtual 60-minute session with your team, gathering feedback along the way.



## Launch!

Your strategist will then refine your strategy using the feedback and new data gleaned in your kickoff session and deliver a final 365 Fundraising Plan ready for you to execute.



## Growth

At your six-month mark in your journey, your strategist will schedule a 60-minute check-in to review progress and fine-tune the next six months of your 365 Fundraising Plan for success.



**For Accelerate Clients Only**

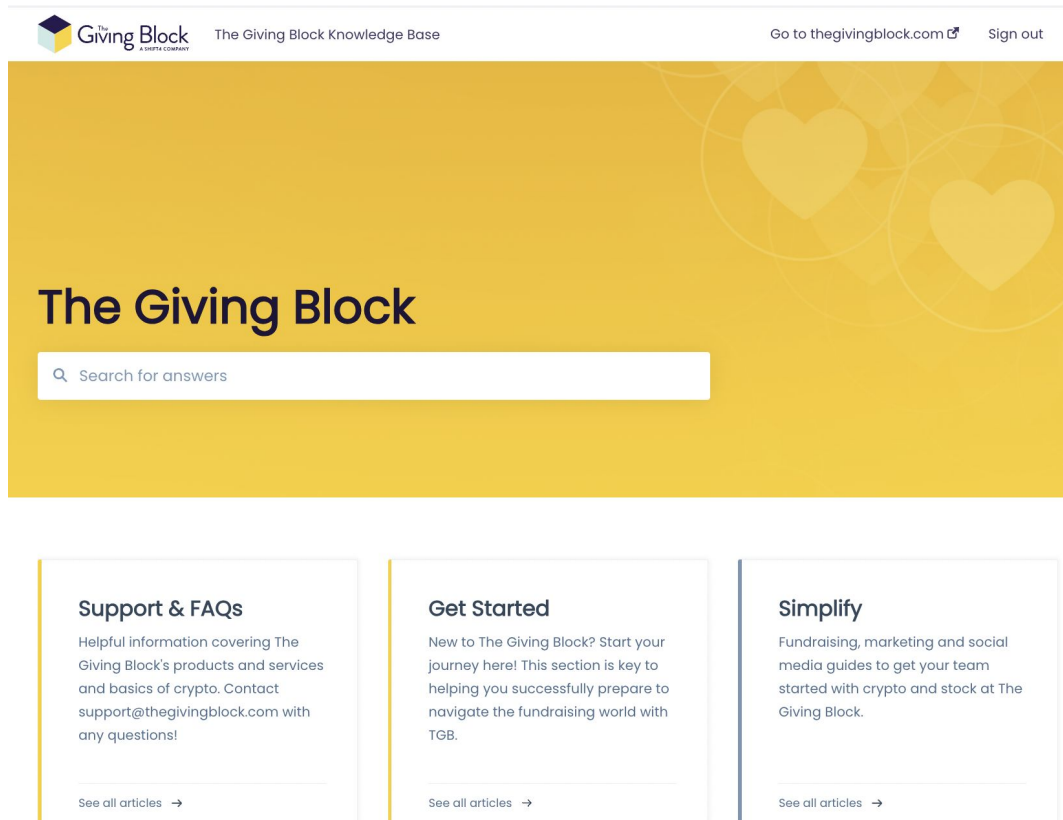
# We Are Here to Support You!



[Support@thegivingblock.com](mailto:Support@thegivingblock.com)

Based on your subscription package, you may also have a dedicated **fundraising strategist** for additional strategic support.

# Knowledge Base



Your first stop for on-demand resources covering general FAQs for The Giving Block services to Crypto Philanthropy and Non-Cash Assets strategy and education.

If you or a member of your team needs access to log in to the Knowledge Base please send an email to [support@thegivingblock.com](mailto:support@thegivingblock.com) with the following information: First Name, Last Name, Email address, Job Title, and Organization Name.

[learn.thegivingblock.com/knowledge](https://learn.thegivingblock.com/knowledge)

# When You Select a Tile in the Knowledge Base



The Giving Block Knowledge Base

Go to [thegivingblock.com](https://thegivingblock.com)

[Sign out](#)

 Search for answers

Search Bar

The Giving Block Knowledge Base > Support & FAQs

Support & FAQs



Support Office Hours

Your Donation Form

The Giving Block Dashboard

Donations Services & Product

Integrations

Security

Reports

FAQs

Tax and Banking

Onboarding for New Clients FAQ

Get Started



## Support & FAQs

Helpful information covering The Giving Block's products and services and basics of crypto.  
Contact [support@thegivingblock.com](mailto:support@thegivingblock.com) with any questions!

### Support Office Hours

Client Support Phone Number

### Your Donation Form

How a Crypto Donation Works

How to Embed a Donation Form for a Single Type of Asset

How to Embed Your All-In-One Donation Form

Embedding Your Donation Form in Squarespace

[See more](#)

Article



**Pro Tip:** Don't forget to select "See More" to access even more articles

# The Giving Block Dashboard

Overview

Donations★

Organizations

Operations

User Management

Cryptocurrencies

Dictionaries

Settings

Onboarding

API Users

Knowledge Base

Organization Name

Clear

Choose Organizations

Filter by Date

Clear

Custom

03.29.2024

03.28.2024

\$0.00

Total Donations

\$0.00

TGB Campaign Donations

Direct Donations

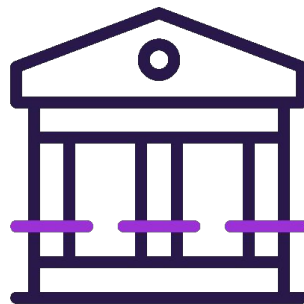
Donation Type	Total Donations	Average Donation	Number of Donations
Crypto	\$0.00	\$0.00	0
Card	\$0.00	\$0.00	0
Stock	\$0.00	\$0.00	0
DAF	\$0.00	\$0.00	0

**Client** – Can view donation & donor information only  
**Client Manager** – Can view donation & donor information, request new users, PLUS donation form customization and more.



**Pro Tip:** Date filters matter! Make sure you select the appropriate date range based on your data needs

# Transaction CSV Reports



Guide to access and download your CSV reports:

- Click on Transactions CSV Report
- Select the date ranges for your donor data reporting needs
- Click "download"
- CSV file downloads with details like below.
- If your organization accepts anonymous gifts all the data about the donor will say N/A.

Transaction ID	Transaction Date	Transaction Time	Organization Name	Currency	Amount	Payment Type	Gross amount	Total Fees	Net Amount	Donor Name	Donor Email	Donor Address	City	Zipcode	State	Country	TXID#
#	Date	Time	Name	Type	Amount of Crypt	Crypto	\$	%	\$	Name	Email	Address	City	Zip	State	Country	TXID#
#	Date	Time	Name	Type	Amount of Crypt	Crypto	\$	%	\$	Name	Email	Address	City	Zip	State	Country	TXID#
#	Date	Time	Name	Type	Amount of Crypt	Crypto	\$	%	\$	Name	Email	Address	City	Zip	State	Country	TXID#
#	Date	Time	Name	Type	Amount of Crypt	Crypto	\$	%	\$	Name	Email	Address	City	Zip	State	Country	TXID#
#	Date	Time	Name	Type	Amount of Crypt	Crypto	\$	%	\$	Name	Email	Address	City	Zip	State	Country	TXID#
#	Date	Time	Name	Type	Amount of Crypt	Crypto	\$	%	\$	Name	Email	Address	City	Zip	State	Country	TXID#
#	Date	Time	Name	Type	Amount of Crypt	Crypto	\$	%	\$	Name	Email	Address	City	Zip	State	Country	TXID#
#	Date	Time	Name	Type	Amount of Crypt	Crypto	\$	%	\$	Name	Email	Address	City	Zip	State	Country	TXID#
#	Date	Time	Name	Type	Amount of Crypt	Crypto	\$	%	\$	Name	Email	Address	City	Zip	State	Country	TXID#




**Pro Tip:** When pulling a report, you can also filter by asset type

# Tax Receipts


- Your tax receipt is customized with your name, logo, EIN, address, and mission statement.
- All donors automatically receive a tax receipt immediately after their donation, provided they provide their email address in the donation form.
- Any additional thank yous from your organization should only recognize the donation in the quantity of asset given. For example, "Thank you for your donation of 1.2 ETH."
- For DAF donations – Donors will receive their receipt from the financial institution when they moved their money to the DAF originally. The Giving Block will send an acknowledgement of the donation.



**Remember!** Crypto and stock assets are subject to change in value, so you only want to recognize the amount donated

**Thank You!** Your tax receipt, courtesy of  Giving Block

**Mental Health  
Impact Index Fund  
Receipt**

 8910 Purdue Road  
Suite 555  
Indianapolis  
IN  
United States  
46268  
Tax ID #: 35-2129262  
DATE: N/A

**Your Tax Receipt**

**FULL NAME:** Anonymous Donor  
**ADDRESS:** N/A  
**CITY:** N/A  
**STATE:** N/A  
**COUNTRY:** N/A  
**ZIPCODE:** N/A  
**RECEIPT ID:** N/A  
**TRANSACTION ID:** N/A  
**ITEM:** Online Cryptocurrency Donation  
**QTY:** N/A  
**FUNDS DESIGNATION:** N/A

**FOR YOUR TAX PURPOSES:** Your donation is tax deductible to the extent allowed by law. Please save this letter for your tax records as confirmation of your donation. No goods or services were provided in exchange for this donation. If you have any questions, please email [support@thegivingblock.com](mailto:support@thegivingblock.com).

# Donation Schedule



*U.S Clients now have the option to receive IIFs, matches and stock donations via ACH. [Find out how!](#)*

## CRYPTO

- ACH transfers initiated weekly on Tuesday's with a minimum threshold of \$50
- Your bank statement will show "Gemini" for the ACH crypto donations

## STOCK

- Gifts come via check or ACH as an FBO "For Benefit Of" to your organization from The Giving Block's DAF - [Ren](#)
- Receiving stock funds is determined by the donor's broker process of moving the shares, which can take 2-3 weeks



## DONOR ADVISED FUNDS

- Gifts come via check or ACH through the donors DAF provider; Sample check [here](#)
- Funds are received between 1-3 weeks depending on provider.
- Each donation is associated with a Chariot ID listed in the grant note and your Dashboard

## CARDS

- Donations are settled daily and funds are sent to your bank account via ACH during that time
- Your bank statement will show "Shift4" (our parent company)

## Impact Index Funds (IIFs), Matches & Emergency Funds

- U.S. Clients - Funds via check or ACH monthly given \$50 minimum threshold is met through Ren
- International Clients - Funds sent 2X/year through CAF America (Charities Aid Foundation America) given \$1,000 minimum threshold is met

# Your Fundraising Journey



01

## Onboarding

Setup and compliance approval.

02

## Learn

Get to know your products and services at The Giving Block.

03

## Prepare

Setup your digital presence and get ready.

04

## Launch

Hello world - we take crypto, stock & DAFs

### Checklist

- ☒ Complete New Client Form
- ☒ Widget and account setup
- ☒ Connect Bank Account

### Checklist

- ☒ Understand your Services
- ☒ Log into your Knowledge Base
- ☒ Access your Dashboard

### Checklist

- ☐ Build your giving webpages
- ☐ Donation Page Audit
- ☐ Social Media and Announcement Plan

### Checklist

- ☐ Announce to the world!
- ☐ The Giving Block Campaign Participation
- ☐ Begin your Fundraising Journey

# Fundraising Foundation Setup Checklist

Your fundraising foundation setup checklist is the essential guide that will walk your organization through all the steps needed to launch your new fundraising program and announce to the world that you now accept these new types of giving assets.

## Where to Find the Checklist

<https://go.thegivingblock.com/activation-checklist>



## Welcome to The Giving Block!

Follow the instructions below to set your team and donors up for a successful non-cash asset giving experience.

- Complete the items in the checklist below, submitting each portion when you are complete.
- If you get stuck, submit your questions to [support@thegivingblock.com](mailto:support@thegivingblock.com) and an expert will help you complete the item.
- Once every task has been completed, a member from our support team will connect with you to confirm the successful setup of your non-cash asset fundraising operation.

0.00%

## Create Your Donation Pages

Create your optimized non-cash asset giving page(s) — Crypto, Stock and DAF — add your donation form and choose one track below.

[READ THE GIVING PAGE STARTER GUIDE](#)

### Choose Your Option:



#### Optimized

**RECOMMENDED!** Create individual pages optimized for Crypto, Stock and DAF.

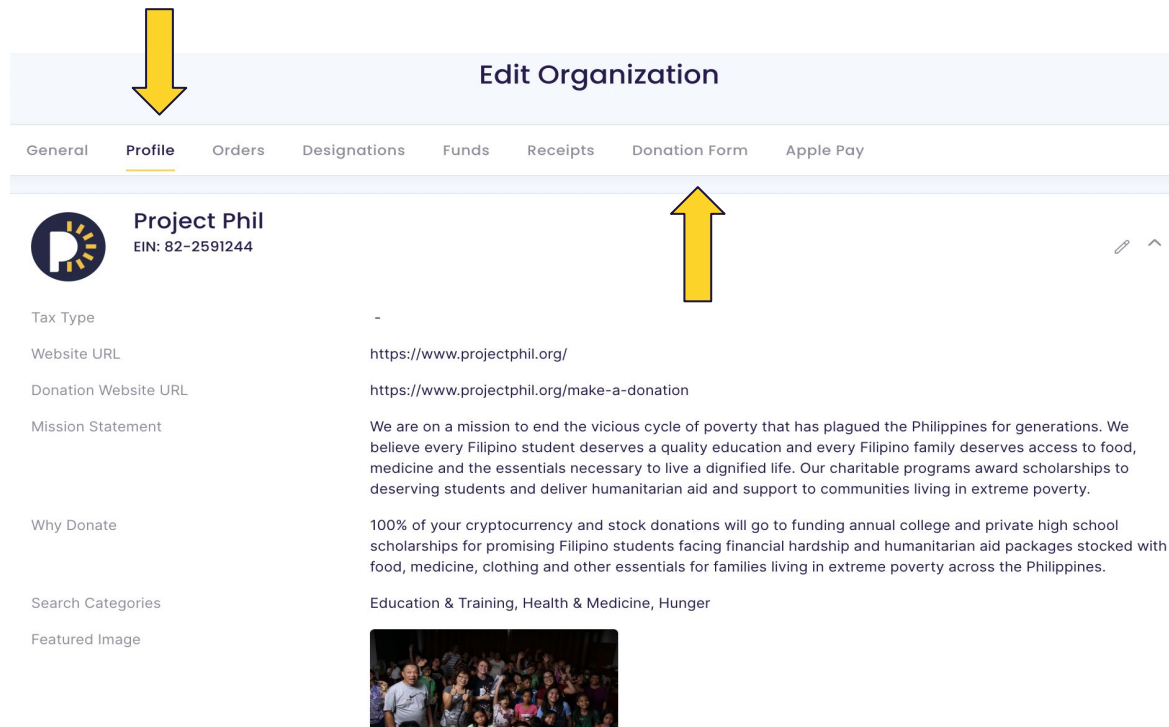


#### Combined Page

Create one optimized general giving page on your website for Crypto, Stock and DAF.

Submit Pages


# Your Donation Form & Code



The screenshot shows the 'Edit Organization' dashboard for 'Project Phil'. A yellow arrow points to the 'Donation Form' tab in the top navigation bar. The 'Donation Form' tab is active, showing the organization's profile and mission statement.

**Edit Organization**

General **Profile** Orders Designations Funds Receipts Donation Form Apple Pay

 **Project Phil**  
EIN: 82-2591244

Tax Type -

Website URL <https://www.projectphil.org/>

Donation Website URL <https://www.projectphil.org/make-a-donation>

Mission Statement

Why Donate

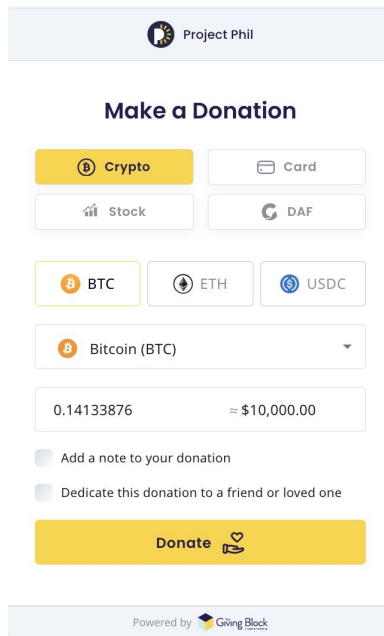

Search Categories

Featured Image


We are on a mission to end the vicious cycle of poverty that has plagued the Philippines for generations. We believe every Filipino student deserves a quality education and every Filipino family deserves access to food, medicine and the essentials necessary to live a dignified life. Our charitable programs award scholarships to deserving students and deliver humanitarian aid and support to communities living in extreme poverty.

100% of your cryptocurrency and stock donations will go to funding annual college and private high school scholarships for promising Filipino students facing financial hardship and humanitarian aid packages stocked with food, medicine, clothing and other essentials for families living in extreme poverty across the Philippines.



Education & Training, Health & Medicine, Hunger








The screenshot shows the 'Make a Donation' page for 'Project Phil'. It features various payment options including Crypto, Card, Stock, DAF, BTC, ETH, and USDC. The Bitcoin (BTC) option is selected, showing a balance of 0.14133876, which is approximately \$10,000.00. There are checkboxes for 'Add a note to your donation' and 'Dedicate this donation to a friend or loved one'. A yellow 'Donate' button with a heart icon is at the bottom.


 Project Phil

**Make a Donation**

 **Crypto**  Card

 Stock  DAF


 **BTC**  ETH  USDC


 **Bitcoin (BTC)**

0.14133876 ≈ \$10,000.00

☐ Add a note to your donation

☐ Dedicate this donation to a friend or loved one

**Donate** 

Powered by  Giving Block

**NOTE:** Dashboard Client Managers have permissions set to customize and pull your organization's donation form & code. You can update which asset appears first through clicking on "Advanced Settings" in Donation Form.

# Be Accessible & Discoverable!

## Additional Examples of Success

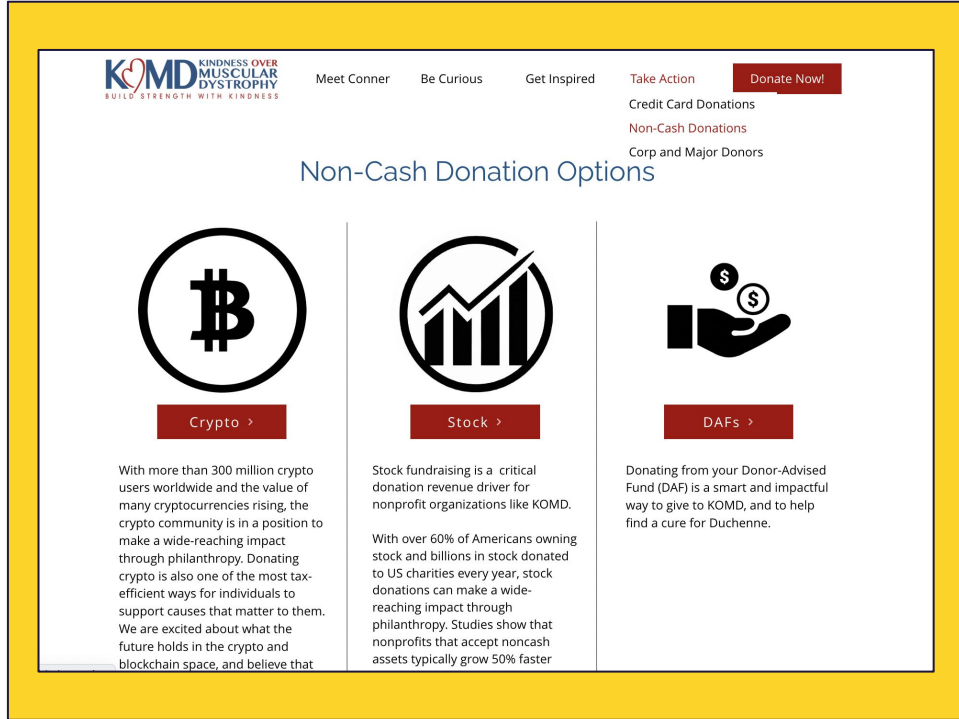
- [Pediatric Cancer Research Foundation](#)
- [Operation Broken Silence](#)
- [The Water Project](#)
- [CARE](#)
- [Project HOPE](#)



Download your [Giving Experience Guide](#) today for step-by-step instructions on how to optimize your donation pages

*\*Single Asset Donation Form*  
*\*Recommended\**

The screenshot displays the Variety - The Children's Charity website. At the top, there's a navigation bar with links for 'About Us', 'How We Help', 'Join an Event', 'Ways to Give', and 'Fundraise'. A 'Donate Today' button is prominently displayed. The main content area features a large red banner with the text 'Donate Crypto' and a sub-headline: 'Make a lifesaving impact for children in need with your Bitcoin, Ethereum, or other cryptocurrency by making a charitable contribution to Variety - the Children's Charity'. To the right of the text is a photo of two young boys smiling. Below the banner, there's a section titled 'Donate crypto, change kids lives' with a brief description of how cryptocurrency donations can support the charity's work. On the right side of the page, there's a 'Make a Donation' sidebar. It includes buttons for 'BTC', 'ETH', and 'USDC'. A dropdown menu is set to 'Bitcoin (BTC)'. Below this, there's a field showing the amount '0.13747269' and its approximate value '\$10,000...'. A 'Select Impact Area' dropdown is also present. At the bottom of the sidebar is a large yellow 'Donate' button with a Bitcoin icon. The footer of the sidebar mentions 'Powered by Giving Block'.

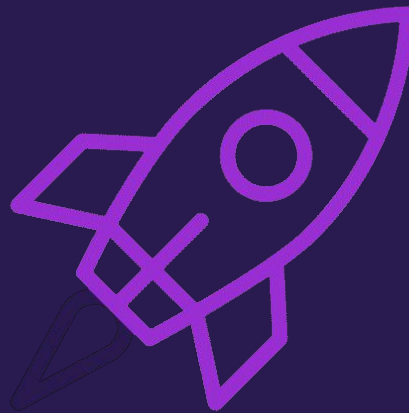


Ways to Give



Mobile Optimization

**READY  
SET  
LAUNCH!**



# Invite Your Donors

It's time to announce that you accept crypto, stock and DAFs to fuel your mission!

1

## Your Audience:

- Current organizational donors and supporters
- Social media followers and audiences
- Leadership
- Community partners
- Broader global audience online

2

## Your Channels:

- Social Media and Online
  - Crypto donors are online!
  - Twitter is the main place for crypto holders
- Email
- Blog Post
- Press Release
- Include it in your next Donor Newsletter
- Don't forget Word of Mouth opportunities like board and committee meetings and events!

# Your Donor Funnels



## Googleability

- SEO Crypto Donation Page
- Blog Posts
- Press Releases
- Crypto Fund Landing Pages



## Current Donor or Key Stakeholder Pools

- Alumni Groups
- Junior Boards
- Corporate Partners
- Gaming Donors



## Social Media Channels

- Twitter
- Twitter Spaces
- LinkedIn
- Discord
- Reddit

# The Giving Block Donor Funnel



The Crypto Giving  
Pledge



Crypto Adoption Fund  
& Impact Index Funds



#CryptoGivingTuesday



End of Year  
Campaigns



Partnership & Integrations

# Hone Your Message

Team up and prepare your plan to announce your acceptance of non-cash assets!

## Your Message:

- We now accept cryptocurrency, stock and donor advised funds!
- There is another way to give to your organization
- Tax incentives of crypto gifts
- Include your mission
- Include a link to your crypto/stock/DAF giving webpages with the donation form
- Use creative images that connect with crypto audiences
- On Twitter and Social Media
  - Include strategic hashtags – #crypto #bitcoin #cryptoisgood #cryptocurrency
  - Tag @TheGivingBlock so we can amplify!
- For blogs, press releases, emails, and newsletters, include a crypto contact
- Don't forget to mention anything urgent that is specific to your organization

# Launch Success Examples

**Pinned Tweet**

**Free Arts NYC** @FreeArtsNYC · Mar 22

We're excited to announce we've started accepting [#crypto](#) donations through [@TheGivingBlock](#)! This is our first step in preparing our young artists to understand that art can be a healing tool as well as a viable career path with a wealth of opportunities in [#Web3](#). [#Donatecrypto](#)



Free Arts NYC Now Accepts  
**CRYPTOCURRENCY**  
*Invest in the future of young creatives  
by donating crypto.*

FREE ARTS NYC

**Roald Dahl Charity** @RoaldDahlFund

We have joined [@TheGivingBlock](#) to accept [#cryptocurrency](#). You can now donate crypto to support our work of providing specialist nurses and support for seriously ill children.  
Donate here today: [bit.ly/3GDyGR8](https://bit.ly/3GDyGR8)

[#DonateCrypto](#) [#CharityCrypto](#) [#cryptogiving](#)



Donate  
crypto

ROALD DAHL  
Marvellous  
Children's Charity

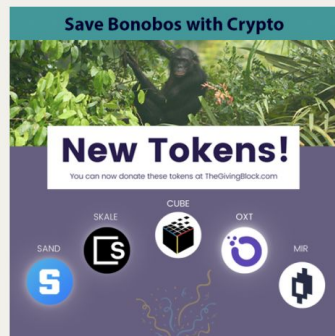
Giving Block

## Crypto Accepted!

Bonobo supporters can now donate crypto! Through The Giving Block, crypto donations are immediately converted to US dollars.

This innovation has allowed us to receive significant gifts from individuals and NFT collector communities such as Bored Ape Yacht Club.

[LEARN MORE](#)



## Email to Donors



**PRO TIP:** When there are major changes in the market (like the current bull run), we encourage you to re-launch your fundraising program and roll out another announcement

AP

U.S. News World News Politics Sports Entertainment Business Technology Health Science Oddities Lifestyle

## FOUR PAWS Partners With The Giving Block to Accept Cryptocurrency

FOUR PAWS International August 11, 2021

*Press release content from Globe Newswire. The AP news staff was not involved in its creation.*



Click to copy

### RELATED TOPICS

Technology  
Business  
Globe Newswire  
Philanthropy  
Cryptocurrency

Boston, MA, Aug. 11, 2021 (GLOBE NEWSWIRE) -- FOUR PAWS, the global animal welfare organization, through their US office based in Boston, Massachusetts, has partnered with The Giving Block platform to enable Bitcoin and Ethereum donations across the US funding programs that rescue and protect animals.

By accepting cryptocurrencies, FOUR PAWS is offering supporters with cryptocurrency portfolios the ability to support the organization in a tax efficient way. The IRS classifies cryptocurrency donations as property, meaning they are not subject to capital gains tax and are tax deductible on the donor's tax returns.

"Now that we can accept cryptocurrency, we are pushing FOUR PAWS into the future by creating and supporting more diverse opportunities for supporting animals," said Country Director of FOUR PAWS in the US, Danika Oriol-Morway.



## Press Release

# Resource: Modern Philanthropy Insider



February 27, 2024

Keep an eye out for our upcoming *2024 Annual Report on Crypto Philanthropy*. We're releasing the comprehensive report later this week, and can't wait to share our findings with you, from statistics and top cryptocurrencies donated to strategic recommendations based on the past year and the current market sentiment.

Sign up for our [Q1 All-Client Webinar](#) on March 4th to hear first-hand insights from The Giving Block's Co-Founder Pat Duffy.

## Inside This Issue

- **Q1 All Client Webinar:** During our [March 4th webinar](#), we are presenting insights from our *2024 Annual Report on Crypto Philanthropy*, plus fundraising strategies for the year ahead.
- **Resource of the Week:** Learn how to [customize your donation form](#) and make it your own.
- **Client Success Spotlight:** Variety - the Children's Charity will receive proceeds from a [Web3/NFT art exhibit](#).
- **In the News:** With 91% of Bitcoin holders [now in profit](#), it's a great time to engage with crypto donors.
- **Client Support Office Hours:** Join us on [March 5th](#) to review Impact Index Fund reporting.

**Your weekly all client communication  
that hits your inbox every Tuesday**

- Upcoming strategy webinars
- Key product and package updates
- Insights into how other clients are engaging
- To-date market news
- And much more!

# Your Next Steps Checklist



- ❑ Complete your Fundraising Foundation Setup Checklist
- ❑ Verify the giving assets within your donation form are correct
- ❑ If you are a client with an Accelerate subscription, please complete your Opportunities Landscape Analysis for Asset Fundraising (OLAAF) survey so you can receive your custom 365 fundraising plan.
- ❑ Once you've created your giving pages, email the Support Team for a complimentary audit
- ❑ Ensure you and your colleagues have login credentials for the Knowledge Base AND Dashboard
- ❑ Add support@thegivingblock.com, no reply and notification@thegivingblock.com to your safe sender list to receive important client updates

