



# 10-Point Checklist – Give Your Attention to Your Erie Gives Strategy!

New to Erie Gives, looking for a refresher, or just making sure you've checked all the necessary boxes? You've come to the right place.

Erie Gives Day is an inspiring day for our community. Thousands of donors from all over the country (and globe!) give to hundreds of local charities on one monumental day in August.

Here at The Nonprofit Partnership, we want to make sure that our member organizations are armed with the tools to be successful on Erie Gives. The checklist below can be used for Erie Gives participants at any stage in the game, whether this is your first year or your eighth. And remember, you get out what you put in! We wish everyone the best of luck with their Erie Gives endeavors.

*Make sure you...*

## 1. Register your nonprofit with The Erie Community Foundation at [www.ErieGives.org](http://www.ErieGives.org).

- ☐ Before registering online, be sure to verify that your organization has a.) an agency endowment with The Erie Community Foundation OR b.) a membership with The Nonprofit Partnership. (Your organization's membership with The Nonprofit Partnership must be in good standing to participate in Erie Gives Day.)
  - ☐ Unsure if your organization meets either of these criteria?
    - ☐ To see if your organization has an agency endowment with The Erie Community Foundation, contact Khristina Bowman at [kbowman@eriecommunityfoundation.org](mailto:kbowman@eriecommunityfoundation.org) or (814) 454-0843.
    - ☐ To see if your organization has a membership with The Nonprofit Partnership, contact Ellen Kehl at [ekehl@yournpp.org](mailto:ekehl@yournpp.org) or (814) 240-2490.
- ☐ To complete your organizations' registration at [www.ErieGives.org](http://www.ErieGives.org), you'll need the following information:
  - ☐ Name
  - ☐ Tax ID number, also sometimes called an Employer ID number or Federal ID number (this can be found on your organization's IRS determination letter)
  - ☐ Cause area (e.g. animal welfare, arts and culture, etc.)
  - ☐ Phone number
  - ☐ Website
  - ☐ Mission statement
  - ☐ Programs and services
  - ☐ Contact information, including full name, title, phone number, email and mailing address
- ☐ Complete this registration prior to June 29, 2018 for your organization to be listed in the special Erie Gives Day edition of the Lake Erie Lifestyle magazine.
- ☐ Complete this registration prior to July 27, 2018 to participate in Erie Gives Day.



- ☐ Need to make changes to your organization's Erie Gives profile after it's posted? Contact Khristina Bowman at [kbowman@eriecommunityfoundation.org](mailto:kbowman@eriecommunityfoundation.org) or (814) 454-0843.

## 2. Read the Nonprofit and Donor FAQ information at [www.ErieGives.org](http://www.ErieGives.org).

- ☐ Be informed! Read the available information so that you are knowledgeable about gift amounts, accepted credit cards, and other details. Be ready to answer any questions from donors – they will appreciate that you are ahead of the game and prepared.
- ☐ Some highlights from the Nonprofit and Donor FAQs include:
  - ☐ Erie Gives will take place on Tuesday, August 14, 2018 from 8:00 AM to 8:00 PM. Donations are made directly online at [www.ErieGives.org](http://www.ErieGives.org).
  - ☐ Thanks to generous sponsors, a prorated match will be made to enhance each donor's gift. A prorated match **is not** a 100% match! The match is determined after the day is complete and totals are calculated. Last year, the prorated match was 7.48%; credit card fees were 3%, providing a net match of 4.48%. *Where can you earn that kind of money in one day?*
  - ☐ Only Visa, Master Card, and Discover cards are accepted.
  - ☐ The minimum gift amount is \$25. There is no limit to the amount of money nor the number of organizations donors can give to.
  - ☐ Encourage donors to ask their employers if they participate in gift-matching. Last year, over \$195,000 was eligible for employee match. Don't let this opportunity pass!
  - ☐ Erie Gives was created to encourage and promote on-line giving. Accordingly, **gifts of individual checks are discouraged**. If a donor insists on making a gift via personal check, it must be for \$1,000 or more and we ask that it be submitted to The Erie Community Foundation no later than Friday, August 10th.
  - ☐ Charitable IRA Rollovers, via check or electronic transfer of cash or securities, are encouraged. If you or your donors have questions about this please contact Susannah Weis Frigon at [sfrigon@eriecommunityfoundation.org](mailto:sfrigon@eriecommunityfoundation.org) or (814) 454-0843.
  - ☐ Donors may indicate whether they would like to remain "anonymous," meaning their name will not be printed in annual reports, newsletters, or elsewhere. However, complete anonymity is **not possible**: some information, such as full name and mailing address, needs to be retained by The Erie Community Foundation.

## 3. Continue gathering information and start customizing marketing and messaging pieces – visit The Nonprofit Partnership's Erie Gives Toolkit online via [www.YourNPP.org](http://www.YourNPP.org).

- ☐ The Nonprofit Partnership's Erie Gives Toolkit can be found in our Resource Library, under the Resources tab at the top of the page.
  - ☐ Get started by:
    - ☐ Downloading the Erie Gives logo in black and white, color, or both



- ☐ Downloading and customizing NPP's templates for Facebook and Twitter covers, social media posts, postcards, flyers, and more – or creating your own!
  - ☐ Need help with any of the customizable materials? Contact Ellen Kehl at [ekehl@yournpp.org](mailto:ekehl@yournpp.org) or (814) 240-2490.

#### 4. Spread the word! Inform stakeholders of your Erie Gives participation via word of mouth (of course!), postal mail, email, social media channels, etc.

- ☐ Draft, edit, and send your organization's donor appeal letter
  - ☐ An example of a donor appeal letter can be found via the NPP Erie Gives toolkit at [www.YourNPP.org](http://www.YourNPP.org). This letter should be sent well in advance.
  - ☐ Additionally, it is a good idea to send a post card of sorts as a reminder prior 8/14/18. Don't wait too long! You wouldn't want your post card arriving at 8:00 AM on 8/15/18!
- ☐ A few essential places to advertise your organization's Erie Gives involvement include your organization's:
  - ☐ Website
  - ☐ Facebook cover
  - ☐ Facebook posts
    - ☐ Be creative! Consider contextualizing donations by tying various dollar amounts to how that money could be used. For example, a \$25 donation could buy 25 meals for 25 hungry children.
  - ☐ Twitter cover
  - ☐ Twitter posts
  - ☐ LinkedIn posts
  - ☐ Google+ posts
  - ☐ Newsletter and/or e-Newsletter
- ☐ THINK EXPOSURE & ENGAGEMENT! This is different for various organizations – find your special mix & niche.
  - ☐ Do you see stakeholders in person? Have flyers available and posters posted!
  - ☐ Do you email a lot? Throw in a signature line reminding everyone of Erie Gives!
  - ☐ Have an event coming up? Make sure to include a few sentences about Erie Gives Day in opening remarks and/or have flyers available.
  - ☐ Challenge your organization's Board of Directors to participate and to ask their friends to participate.
  - ☐ Feel free to share, repost, and like posts made by The Erie Community Foundation throughout the day on 8/14/18. The media covers the event and ECF shares the coverage.

#### 5. Create a Facebook event for your organization's Erie Gives Day involvement.

- ☐ Utilize the Facebook event feature to connect with the people that are already following your organization's page and care about your cause. Those who mark interested on your event listing will be reminded of the event prior to and during Erie Gives Day. This is significant – people are so busy these days that they are always forgetting.



## 6. Help The Erie Community Foundation share your story!

- ☐ The Erie Community Foundation has an online following that is both engaged with Erie Gives and strongly connected to the cause of philanthropy. Send an image and a short description of how your organization plans to use their Erie Gives proceeds to Khristina Bowman at [kbowman@eriecommunityfoundation.org](mailto:kbowman@eriecommunityfoundation.org) or Erin Fessler at [efessler@eriecommunityfoundation.org](mailto:efessler@eriecommunityfoundation.org) and ECF will post your story to their Facebook page for additional exposure.

## 7. Take advantage of your membership with us at NPP – visit us for Erie Gives related educational opportunities and MORE!

- ☐ At NPP, we are adamant about giving members what they want and need. We offer a handful of Erie Gives-related workshops each year.
- ☐ We also offer dozens of other learning opportunities that contribute to Erie Gives success, such as sessions on marketing and fundraising, all year long. Stay up to date on our educational offerings at [www.YourNPP.org](http://www.YourNPP.org)!

## 8. Do things by the book! Don't get your organization in trouble trying to top the charts.

- ☐ Remember: Erie Gives is based on an honor system.
- ☐ Do not re-gift money to your nonprofit from your organization's operating budget.
- ☐ Don't ask people to make payments for things like programs, services, tuition, etc., through Erie Gives.
- ☐ If an organization designates Erie Gives money for a specific project, then they need to honor donors' intent and use it for that project.
- ☐ People cannot be entered into a drawing by making a donation as that turns the transaction into a game of chance, which nullifies the charitable giving aspect.
- ☐ Have questions about something your organization has planned or has done in the past? Run it by Adam C. Bratton, Executive Director with The Nonprofit Partnership. He can be reached at [abratton@yournpp.org](mailto:abratton@yournpp.org) or (814) 240-2490.

## 9. DON'T SLACK ON THE BIG DAY!

- ☐ If you have an email list, remind your stakeholders in the morning to think of you on Erie Gives Day.
- ☐ Stay active on social media! Post consistently throughout the day.
  - ☐ Consider taking fun bets throughout the day. For example: *If we surpass our goal of \$### by 3:00PM, Jerry will get a pie in the face!* (We don't need any Erie Gives tragedies... make sure Jerry isn't allergic to the pie!)
  - ☐ Post video updates. Video is the future! Keep a tally board going throughout the day and invite donors to join you on camera.





### 10. Be thankful. During Erie Gives *and always*.

- ☐ Send personalized thank you notes to the sponsors of Erie Gives. Without them, Erie Gives wouldn't be possible. The match pool grows each year, as does the graciousness of our community. With this growth, our gratitude must keep pace.
- ☐ After receiving your Erie Gives check and donor list on Tuesday, August 28, 2018 at 9:00 a.m. at the Erie Zoo, make sure to thank your donors. While it's true that the donor will receive an email from the Erie Gives team on the day of giving for tax purposes, it is more meaningful if a thank you comes from the organization itself.
  - ☐ Some donors find it confusing to get the note weeks later – include a short line making sure they know that the Foundation's team needed time to process the magnitude of generosity.
- ☐ If you would like an electronic copy of your donor list, please email Lisa Bolte at [lbolte@eriecommunityfoundation.org](mailto:lbolte@eriecommunityfoundation.org) after 8/28/18.
- ☐ The Erie Gives team will send your organization a survey post-Erie Gives – please respond! Your answers help to improve Erie Gives.
- ☐ To download a copy of photos taken at the Erie Gives Check Presentation Day, visit [www.ErieGives.org](http://www.ErieGives.org) post-8/28/18.

If you have any questions about this checklist, Erie Gives as a whole, or anything else related to the nonprofit sector, please don't hesitate to reach out to the staff of The Nonprofit Partnership.