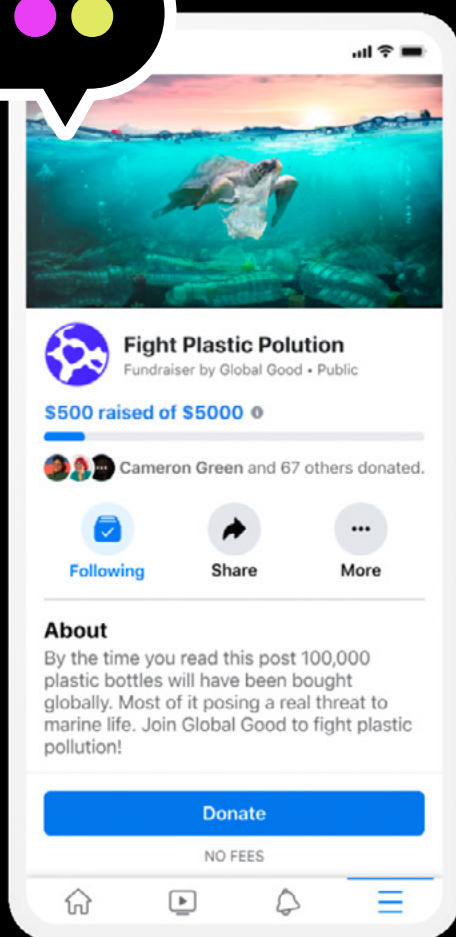


SETTING UP FACEBOOK GIVING TOOLS:

The Complete Guide for Nonprofits



In a nutshell:

Meta's Facebook Giving Tools offers a unique opportunity for nonprofits to engage with supporters and drive donations directly through their social media platform. Since its original inception in 2015, nonprofits have been able to grow their mission by adding a viable, new revenue channel and access to an infinitely larger user base than any P2P event could provide.

Yet, there's still so many questions and unknowns for nonprofits today around social media fundraising and Facebook Giving Tools in general - from signing up to get access to how to make the most of the amazing set of tools that Facebook offers for nonprofits.

In this ebook, we'll show you how to apply, set up, and utilize these tools to grow your organization's reach and impact while taking control of your new lead and revenue stream. Whether you're new to Facebook or a seasoned pro, this guide has everything you need to get started on your social media fundraising journey.

TABLE OF Contents

DEFINING SOCIAL MEDIA FUNDRAISING

The Trend toward social giving	2
Why it's imperative to your greater strategy	3
Why Meta	5

GETTING STARTED WITH FACEBOOK FUNDRAISING

Eligibility requirements	6
Transaction reports	7
Navigating Facebook's Nonprofit Manager	9

CHAPTER 1

THE OVERVIEW Social Media Fundraising



→ The trend toward social giving

Prior to the advent of nonprofit crowdfunding, all giving happened straight through the nonprofit: direct mail, websites, email, and sponsored in-person events. With each of these methods, the organization controlled the process, the technology, and ultimately, the data from fundraisers.

This has typically provided a very definitive path to predictable revenue year over year for nonprofits. However, with macro events like COVID-19 playing a huge role in the evolution of fundraising strategies, nonprofits have to expand how they view fundraising to meet a wider support base with the reality that existing fundraising strategies may not be as effective as they once were.

With that in mind, there's been an intentional shift in the way people choose to give: a shift toward social media and more meaningful, lasting relationships with the causes they support. A shift to third party platforms.

Social media giving is on the rise. In fact, more than half **(54%)** of respondents in a **Georgetown University survey** indicated they are more likely to support a cause through social media rather than offline. Why?

1 IT'S EASY.

This “ease” (or lack thereof) is a crucial determining factor in whether or not someone makes a donation. For example, if their payment information is already stored in Facebook, it's as easy as **one click**.

2 IT'S FAMILIAR.

Millennials now make up the **largest percentage** of the workforce, and their financial significance is only growing. Further, Millennials and Gen Z alike have a growing desire to drive positive change. And social media is their stomping ground.

3 IT'S ACCESSIBLE AND CONVENIENT.

Supporters want to give where they already spend time, and... it's not always driving to an event or navigating through an unfamiliar website. It IS social media.

As with for-profit business and retail, being present where people are, with the right message, when they need to hear it is crucial for revenue growth. As noted above, younger generations especially expect organizations—no matter the size—to be more human and accommodating. To be there, where they are when they need you.

1 size fits all fundraising is out. Personalization is IN.

The bottom line: nonprofit organizations need to be here, in social media. With the right strategy and tools, you can take control of your revenue in social media fundraising.



→ Why it's imperative to your greater fundraising strategy

Facebook Giving Tools, and social media fundraising in general, can be daunting at first look. Thankfully it's not that intimidating once you get into it... It's just a shift in the way we've traditionally thought about fundraising and requires a little flexibility. The result, if done right: engaged, long-term supporters. Hard to argue with that.

Legacy fundraising methods are not going away, and we're not saying throw them out. It's likely you are participating in a mix of fundraising initiatives—each of them a valuable touchpoint to steward giving; however, as technology advances and social media becomes more and more of a preferred platform, the shift to a greater weight on social media is imminent and should be used to enrich your greater strategy.

In case you're thinking, "yeah, but, people will always come back to our site to donate," **check this out:**

- As of January 2022, **4.62 billion** people worldwide are active on social media. That's up 10% from 2021, with Facebook being the **third most-visited website**, trailing only Google and YouTube.
- More than **480 million** people around the world are connected specifically to a nonprofit page on Facebook and have raised more than \$6 billion on the platform alone.
- Spending overall on social media (not ONLINE; on social media) is expected to surpass **\$56 billion** by 2023. That's a staggering **86% increase** since 2020, with Gen Z and Millennials accounting for most of it.

Consumer behavior, though not specific to donations, is not a trend to be ignored. Placing an emphasis on social media fundraising now future-proofs your organization and readies you for the inevitable.

And it's more than a simple "donate" button on your posts... Social media has become a top channel for online brand research, second only to search engines, and is widely used for every stage of a purchase journey (including donations). That's why many for-profit businesses are reimagining what their **commerce experience** looks like. To win in 2023 and beyond, you must create a thoughtful path that leads to and extends far beyond the point of donation. On social media.

BUT WAIT, THERE'S MORE.

Social media allows your organization to create more meaningful relationships (efficiently) with your supporters through one-on-one conversations and personalized content. (Psst... this is the "social" part of "social media." Try not to lose sight of the true value it brings.)

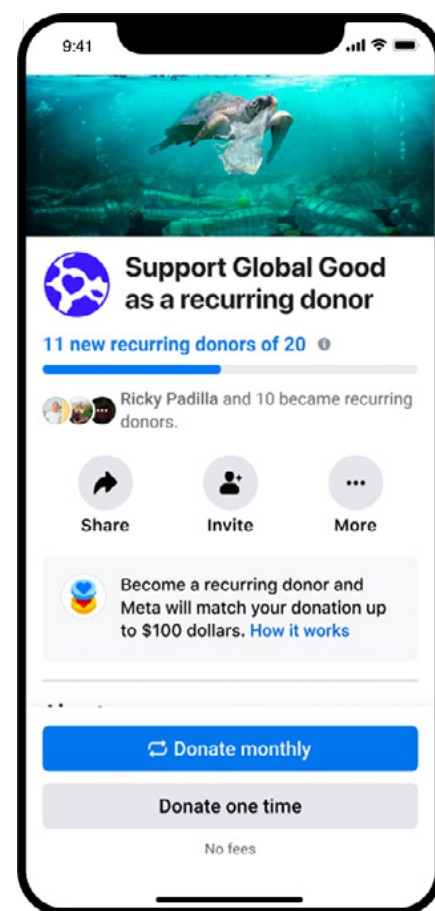
People report that they use Facebook for two main **reasons**:

1. **To connect** with the people they care about.
2. **To support** the causes and ideas they believe in.

Um hello, nonprofits!

The goal for you? Know them. Gain knowledge of the roles they play in connection to your organization (i.e. Are they a caregiver? A patient? A foster parent? A community advocate?), and actually give them what they need. It's a whole new level of support from your nonprofit—a level that creates long-term loyalty and trust—and strengthens your community.

Use social media as a conduit to create a 360-degree view of your supporters, and use the data gained to create more personalized experiences across your methods of communication. In turn, see dividends throughout their lifetime, not just a single, one-off donation.



→ Turn to Meta

Meta is the OG of the social giving space, and there's a good reason GoodUnited has focused a ton of energy building a foundation here.

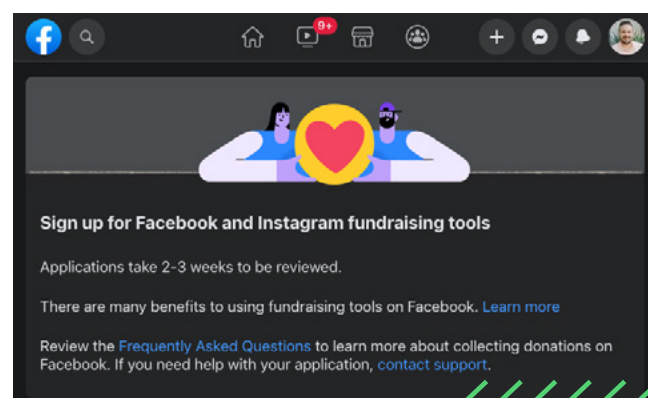
- 1 Why we've partnered with Meta: they are deeply focused on innovation and providing tools that accelerate your nonprofit's growth and impact now and in the future. Facebook has already surpassed every alternative network in regards to functionality, accessibility, and **features** which support GoodUnited's **mission** to democratize the nonprofit supporter experience (more to come on those features later). And when we say "surpassed," we mean leaps and bounds beyond other platforms and technology, especially when it comes to engaging with your supporters, building a community, and creating more proactive and sustainable outreach strategies.
- 2 Facebook does not charge a **processing fee**. 100% of all donations go directly to your organization.
- 3 It's where people are, and data is **data**.
 - 89%** Visit the site at least once a day
 - 47%** Support causes
- 4 **Facebook** itself emphasizes its ability to raise awareness of your cause, mobilize volunteers, serve beneficiaries, achieve real-world results, and fundraise.
- 5 In short, Facebook donations—as with **nonprofit donations processed through any other channel**—are tax-deductible. These donations are considered "cash donations," and the deductibility of them is considered in a similar manner to that of a donor writing a year-end check to your nonprofit. For more details on donations and tax receipts, **see here**.

CHAPTER 2

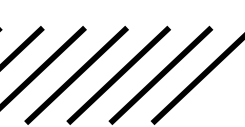
GETTING STARTED with Facebook fundraising

Let's start at the beginning: if you haven't already, **create a Facebook Page** for your organization. A Facebook Page is free and foundational as we chat through using the platform for fundraising, and is crucial to build an online community. Just by getting this off the ground, you get access to follower insights and advertising.

Speaking of advertising—though not the focus of this guide—you might want to set up Meta **Business Suite** (which is separate from Nonprofit Manager we'll cover in detail later).



You don't have to sign up and get approved for Facebook fundraising. If you meet the requirements, all it takes is for a supporter to start a fundraiser on your behalf. However, if you choose not to register directly with Facebook fundraising, it can impact how donations are paid out to your nonprofit, how often you'll be paid out, and which tools you can use. So, again, you don't have to, but should you? Yeah, probably. Here's an **easy link**.



Still not sure what all you need to get rolling? Keep reading. If you're already set up, the next ebook in this series that you will want to check out – [Facebook Fundraising 101](#) coming Feb. 2023

Facebook's eligibility requirements

There are **eligibility requirements** (which vary by country/region) set by Meta to access Facebook's Fundraising Tools, and access types are determined by the information you provide when setting up your Nonprofit Facebook Page.

To be eligible:

- **US Only:** Be a **501c3**, have a tax ID number, have an account registered with a licensed bank, and be registered with the IRS.
- **Be registered** with an acceptable nonprofit registry in your country. [Find a registry](#).
- **Be based** in the U.S., Puerto Rico, or certain countries in Europe.
- **Set your** organization's Facebook page category to "Nonprofit Organization" or "Charity Organization."
- **List your** organization's address in the "About" section.



To verify your organization

the application process will also ask for a few official documents (so it'll speed up the process if you have them on hand to start):

- 1 **Information about your organization** like name, address, contact information, and tax ID number
- 2 **Information about your CEO**, including name, date of birth, and address
- 3 **Information about your CFO and COO**, including name and date of birth
- 4 **A PDF of a bank statement** dated within the last six months with your organization listed as the bank account holder (including a SWIFT code and a bank IBAN number).
- 5 **List your organization's address** in the "About" section.

→ Choose a payout method

In your application process, Facebook gives you options on how to receive your donations. We've said it before and we'll say it again: Facebook takes no percentage of fundraiser revenue, so it's all yours.

OPTION 1: META PAY

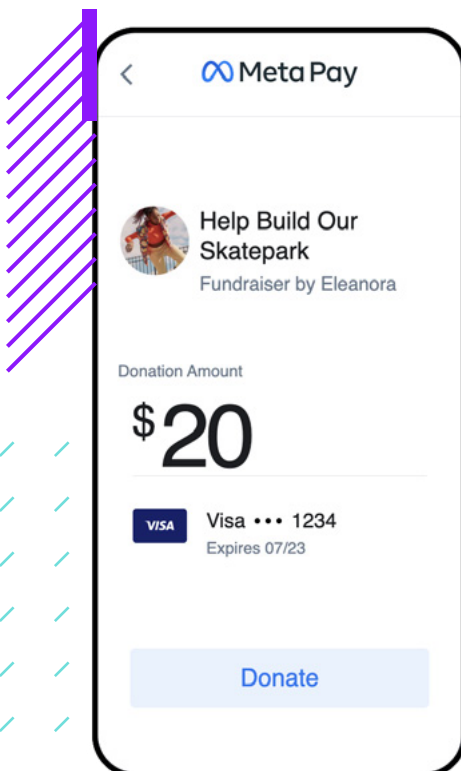
Meta Pay is a direct payout system and happens electronically. Once your organization achieves the minimum donation amount (\$25, £100, €100 or equivalent), you'll be eligible for payout which occurs every two weeks. This option is direct-deposit and requires banking information to be included in your application.

One other benefit worth noting: if you're registered with Meta Pay, donors can opt-in to provide additional contact information to your organization (did someone say long-term value?). You can later find this information both in the Transaction Reports and Nonprofit Manager.

OPTION 2: NETWORK FOR GOOD

Network for Good is Meta's donor advice partner and distributes donations through a donor-advised fund. All donations made within a month are deposited into the DAF (a charitable savings account that gathers interest) and are later directed to the nonprofits they were intended for via check (versus direct deposit). This is the slower of the two options and does not require banking information. You can expect to receive the donations 45–75 days after the initial donation. (Funds can be sent by electronic transfer if your nonprofit is registered with Network for Good directly.)

If you're a nonprofit that's registered with your country's nonprofit registry and hasn't applied through Facebook, you may be pulled into the Facebook Fundraising Hub automatically. By default, you'll be paid out through Network for Good's Donor Advised fund.



Quick recap:

- 1 If you don't sign up** for Meta Pay, you'll be waiting for funding.
- 2 If you do sign up** for Meta Pay, you will see expedited donation deposit timelines and you may receive additional donor information.

(Note: if you're having issues with payout and need support, [click here.](#))

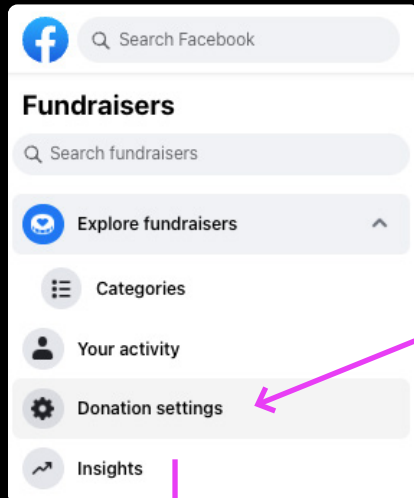
Facebook Transaction Reports

You want data? Here's what **Facebook provides** directly:

Payout report: details on how much money your organization was paid out over a given time period

Multi-day transaction report: details on each donation, including donor's name, donation amount, email address if they opted in, as well as the fundraiser's name and URL.

You may have seen or heard of the transaction report already. The data will export as a .csv file, which you can then import into Excel or your CRM software (but you'll likely need to reformat the fields to fit into your database).



To access your transaction report on the **New Page Experience**:

- 1 Login and click the heart icon on the left
- 2 Click **donation settings** on the left
- 3 Click **Get donation reports**
- 4 Choose **multi-day transaction report** in the dropdown
- 5 Select the date range for the report(s)
- 6 Enter the email address you want the reports sent to
- 7 Click **email reports**

CHAPTER 3

NAVIGATING Nonprofit Manager

Once your Page is set up and you've begun receiving donations, you should have access to Facebook **Nonprofit Manager**. (*Note: this is only available for those on the **New Page Experience** and on desktop). You can navigate to it via the left menu or by using the URL www.facebook.com/nonprofit-manager.

Developed by the Meta Social Impact Team, Nonprofit Manager is a "dedicated space for nonprofit organizations on Facebook that brings together fundraising opportunities, provides actionable insights and makes it easier to engage with supporters."

In other words, for the first time, all of the Facebook features dedicated to nonprofits can be found in one place and allows you to manage your daily fundraising operations, get and filter data, and communicate directly with your supporters. You can see everything from fundraisers to high-level insights on the dollars you've raised.

THERE'S A LOT TO SEE HERE, SO LET'S BREAK IT DOWN BY TAB.

Fundraising Campaigns Tab

Here you can access and **manage your fundraising campaigns**. Specifically, you can review your active campaigns' performance, download reports, see all your past fundraising campaigns, and view all those created on your behalf.

A few key features worth noting within the platform as a whole:

- **Opt-In** – Users are automatically opted-in to receive future communications (Messenger outreach, email, etc) unless they choose to uncheck the boxes and opt-out. You can see who has chosen to stay connected in the Supporters tab.
- **Automated thank-yous** – Nonprofits can provide templated thank you messages to be auto-deployed after users create fundraisers on your behalf. You can set it up and tailor your messaging in the Settings tab.

Note: Nonprofit Manager does not replace Meta Business Suite or Creator Studio.

Home tab

This tab gives you an **overview of recent and upcoming activities**, including recommendations on what to do next to further your mission. This is also where you'll see your notifications, best practices, and quick access to FAQ/Help Center.

Supporter Tab

This is a dedicated space to **get to know your supporters**. It's got custom filters to better understand who is a fundraiser versus a donor, or who is a recurring donor, and you can see (and THANK) all supporters who have opted in to stay in contact with your organization (and considering Meta's **update** to auto opt-in donors, this is HUGE).

You can filter by activity (organized a fundraiser or donated money), when they last engaged with you, or by whether or not you've already reached out to say thanks. Such a crucial space to begin this 1:1 relationship we've been harping on.

Supporter Outreach Tab

This is where you can interact and engage with **your supporters who have opted in to stay in touch**. Here, you can set up automated message series to supporters, like thanking donors or welcoming recurring donors. You can turn it on as needed and create custom messages in your brand voice to start a meaningful conversation.

YOUR Next step

If you made it this far, congrats! By now, you should have a good understanding of how to set up and use Facebook Giving Tools to support your cause or organization at a global scale.

Utilizing these tools and engaging with your existing social community, you can take the steps to control your social media fundraising efforts and maximize sustainable lead and revenue generation.

We've got another ebook coming in February, **Facebook Fundraising 101**, that will help keep your nonprofit moving forward on it's fundraising journey. Ready to take the next step? Chat with our experts to see how **GoodUnited** can benefit your nonprofits efforts.

Let's Talk



Coming Feb. 2023:
Facebook Fundraising 101

