MANAGING YOUR IOBY CAMPAIGN
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Managing your ioby Campaign
How do I find my live fundraising page and web address?

This article walks through how to find your approved and public fundraising page on ioby.org.

If you have a fundraising page draft that is not approved and has not been made publicly available yet, please reach out to your Leader Success Strategist at support@ioby.org for help.

1. Log into your ioby account with your username/email and password.
4. From the My Project list, you will see a list of your current and past ioby crowdfunding projects. Your public fundraising page (the current one) will have a "project status" of Open. Click on the name associated with that project status and you will be taken to your public fundraising page.
How do I post an update to my campaign page?

There are plenty of reasons why you should share updates with your donors and those following your campaign. If you're ready to share your progress, but aren't sure where to start, read on for step-by-step instructions for how to post an update to your campaign page!

First, make sure you're logged in.

COVID-19: Times are tough, but our communities are tougher. Learn more about how you and your neighbors can play a part in tackling community needs.

How will you make your community

Managing your ioby Campaign
Then, head to your live campaign page.
Select "updates" from your toolbar, and then "post an update."

Give your update post a title and fill out a short description.

Keep the title short. Something like "Thank you!" or "We're halfway there!" will do the trick.
Upload an image or link to a live image URL.

Click the "Browse Server" button to search for files on your computer.
Don't forget to save your work!

Hooray, now your update is public!

We've come a long way!

Thanks to everyone who came out to get their hands dirty at Sunday’s event. Special thanks to each of you who made a donation to to my campaign! Every dollar counts towards our beautification goals.
Here's a pro tip: Instead of sending out an email or posting the progress on your social media page, **share the link to the ioby update via your communication channels.** This sharing strategy will create additional traffic to your current fundraising campaign, so as your network reads your story, they will have the chance to be a part of it by making their tax deductible gift right there on your ioby campaign page!

To learn how to make edits to your update, [check out this article.](#)

Still stuck? Give us a call or email us at success@ioby.org and we can help!
How do I share my update with donors and potential donors?

Let’s say you have photos from a recent event, your work has been featured in a local paper, or you have a major update that you can’t keep to yourself! These are all great opportunities to engage your donors, and potential donors, with your awesome story.

Here’s a pro tip: Instead of sending out an email or posting the photo on your social media page with the photos or link - post the news as an update to your campaign page. Here’s how!

Then, share the link to the ioby update via your communication channels.

How to link donors directly to your Updates feature

To do this, first find the URL link to your campaign page, and then add "#updates" to the end of your URL. See the image below.

Now that you’ve got your handy #UPDATES link, share that out via your communication channels.

As a bonus, this sharing strategy will create additional traffic to your current fundraising campaign. This way, as your network reads your story, they will have the chance to be a part of it by making their tax deductible gift right there on your ioby campaign page!
Best practices for sharing out your news

1. Share updates with your current donors (access your donor list detail to grab email addresses). Thank them for their gift, and ask them to share with a few friends. Make it even easier by including some suggested text for them to just copy and paste a message to their friends.

2. Post the link above to your social media sites. You can shorten the URL if it's too long for the social media platforms you use.

3. Share the link with your fundraising team, and ask them to follow up with their contacts. At any point in your campaign, it is a good practice to cross check your team's current donors with your original prospect chart, and your photos and stories are a great excuse for follow up outreach. Who doesn't love a great story!

4. If you're trying to grow relationships in your community, use this story to spread the word to your local partners about the neighborhood scale project you're leading. Even if they don't give to this campaign you're setting the stage for future collaboration.

For all of these sharing steps, don't lose the chance for a wider audience to see your current fundraising campaign. Be sure to use the direct link to your ioby campaign Updates Page.

There are plenty of reasons why you should share updates with your donors and those following your campaign. If you're ready to share your progress but aren't sure where to start, read on for step-by-step instructions for how to post an update to your campaign page!
How do I edit an existing project update?

Find your project update

Head over to your ioby campaign page, and click on the updates tab.

Select EDIT

First, hover your mouse along the upper right corner of the update that you'd like to edit. This will make visible the setting widget (looks like a gear).

Hint - It is directly parallel to the title of your update.

Then select Edit.
Save your changes

Saved changes will be updated immediately.

To learn how to share your update and drive traffic to your fundraising page, check out this article.
How do I add, remove, or change display order of the photos on my campaign page?

First, make sure you're logged in
Head to your live campaign page, and select "Edit" on your toolbar

Navigate to the "Extras" tab

The module to upload images is located halfway down the page.
ADD PROJECT PHOTO(S)

Jazz up your page with some visuals! All uploaded images will display in a photo gallery on your live campaign page (maximum five photos). You’ll be free to edit, remove and update your media anytime during the course of your campaign.

Add a new file

Files must be less than 2 MB.
Allowed file types: png gif jpeg jpg.
Images must be larger than 100x100 pixels.

If you have fewer than 5 uploaded photos, select "Browse" to upload a new image
Select a photo to upload

Once you've chosen an image, select "Upload"
If you like, add a title and/or alternate text

Don't forget to save your changes!

You can drag and drop photo tiles to re-arrange the order your photos appear and select "remove" to delete a photo. When your photos are where you like them, scroll down to the bottom of the page, and click "submit" to save your changes.
Troubleshooting

If you're experiencing issues uploading your photo, make sure your photo file is in the correct format. It needs to be:

- less than 2 MB
- a .png, .gif, .jpg, or .jpeg file
- larger than 100x100 pixels
Add a new file

Files must be less than 2 MB.
Allowed file types: png gif jpg jpeg.
Images must be larger than 100x100 pixels.

Choose File  No file chosen
How long does it take to receive my raised funds?

Congratulations on reaching your crowdfunding goal! Although the timeline varies based on payment method, you should receive your raised funds within 5-15 business days after you sign the Project Agreement, which you will receive once you reach your crowdfunding goal. This is a little longer than our normal wait time so we will do everything we can to get it to you sooner. We will send your funds via check or secure e-payment.

If ioby is your fiscal sponsor, we will send the payment directly to the project leader working on your ioby campaign. If ioby is not your fiscal sponsor, we will send the payment to your nonprofit organization or your fiscal sponsor.

If you've completed your campaign and are ready to access the money you've raised, here are the next steps for closing out your campaign to receive your funds.
How do I log into my ioby account?

Login Instructions

First, head over to the [ioby.org home page](http://ioby.org), and then select "Log In" on the top right of the main menu.

Depending on your browser, you may just see a "Menu" option in the top right corner. If so, click on "Menu," and the log in box is located at the very bottom of the list of menu options.

Enter your email or username along with your password.
Troubleshooting

If you can't remember your password, select the option to "request new password."

Enter your email address into the field, and then click on the "E-mail new password" button.
Then, look out for password reset instructions in your email inbox. If you don’t receive an email from us, check your junk or spam folders. It may be hiding in there!

If you can’t remember your username, use your inbox's search function to look for an email confirmation from "info@ioby.org" detailing your "account details."

User account

Create new account  Log in  Request new password

E-mail *

E-MAIL NEW PASSWORD
How do I find my donor contact information?

As a project leader, you have access to this information through your ioby campaign page, and more specifically, the Donor List Detail. Reach out and say thank you and further engage them in your awesome neighborhood-scale work!

We take protecting your contact information and the contact information of donors very seriously. To understand the donor information that you can expect to receive as part of your fundraising campaign, please click here.

Log into your ioby account and go to your campaign page

First, log into your ioby account. When you’re logged in as the project leader on your campaign page, you’ll see an additional option available, your Donor List Detail.

Click on the Donor List Detail to view donor information

1. The name and email address are optional items of information to donors during the checkout process, so as a result, they may be abbreviated or noted as ANONYMOUS. If you see this type of information in your donor list detail, the donor has opted to remain anonymous or refrain from leaving their contact information for you, or the donor has made a gift by check.
ioby cannot provide additional information about donors. Click here to read more about the type of donor information you will have access to as a part of your fundraiser.

2. The amount of a donor's gift is always available and is noted in this column.

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**Thank your donors**

As you and your team see names come in on this Donor List Detail, be sure to reach out and thank them. If you or a teammate knows someone personally, call them and thank them. Or, if you're friends with them on social media, tag them and thank them!
How do I change my deadline?

If you'd like to adjust your deadline, you can do so by simply editing your ioby campaign to reflect the new date. To do this, make sure that you're logged into your ioby account and navigate to your ioby campaign. Then, follow these steps:

1. Click "Edit"
2. From the "Project Information" tab, scroll down to the "Public Deadline" box and select a new date
3. Don't forget to hit "Save and Next"

After saving, when you navigate back to your campaign's homepage, you should see your new project deadline.
How to do I upload a video to my Campaign Page?

A video is a great way to bring your campaign page to life! If you have a video that you want to share, read on for a step-by-step guide to upload your video to your campaign page.

Check your video file

First, make sure you have the correct video format. ioby campaign pages can only accept a video URL hosted by Vimeo or YouTube (a FULL YouTube URL like youtube.com/example. The template youtu.be/example will not work). Any other text will cause the page to appear incorrectly.

If you do not have a video file in one of these formats, check out these links for help uploading a video to YouTube or Vimeo, or reach out to your Success Strategist at success@ioby.org for assistance.

Upload your video your page

Once you have the correct file format, navigate to your campaign page.

First, make sure you're logged in.

Then, navigate to your campaign page. To upload a video, select "Edit" on your toolbar.
Then, click on the "Extras" tab

You will upload your video URL under the "Add project video" section towards the bottom of the page under any photos you may have uploaded.

Insert a Title for your video, and paste the video URL into the URL box.

**Remember:** the video format must be a Vimeo or YouTube URL. Any other text will cause the page to appear incorrectly.
Add project video

At this time we can only support existing Vimeo and Youtube video files. If you have a video on one of these platforms, please add the link here.

Title *

The link title is limited to 128 characters maximum.

Building a Bench

URL

https://www.youtube.com/watch?v=seWbrNYvn4

Don't forget to save! After titling your video and pasting the video URL in the URL box, scroll down to the bottom of the page and click the "Submit for Review" button to save your changes.

← Back Delete

Submit for Review

This will take you to a Thank You! page.
Check your work

To check that the upload was successful, navigate back to your campaign page. Your uploaded video should now appear as the main thumbnail or poster frame on your campaign page.

If your video isn't displaying or playing properly, please check out our Support Center articles for help troubleshooting your Youtube or Vimeo videos.
Managing your ioby Campaign
Why isn't my Youtube video playing properly?

Is your Youtube video not playing properly?

You uploaded a Youtube video to your campaign page, and you can see a video thumbnail or poster frame for your campaign video. However, when you attempt to play the video, you receive an error message like the ones below. If this is happening to you, please read on.

Your Youtube video may not be displaying properly for one of two reasons. To determine which, please check the video link you have pasted into the URL box on your ioby campaign page.

(To find this from your project page, click EDIT > then click the the EXTRAS tab. Your video URL will be towards the bottom of the page under any photos you may have uploaded.)

If you have a URL that begins with https://www.youtube.com/, continue to Option 1. If you have a URL that begins with https://youtu.be/, skip to Option 2.
Option 1.

If you have a URL that begins with https://www.youtube.com/ like the example below, please check your link carefully.

Upon looking closely, you should find an ampersand (&) towards the end of your link, followed by more text. This extra text is causing the problem. Please delete any text beginning with "&" onward.

Your original URL:

https://www.youtube.com/watch?v=mx6-zsFCoj8&feature=youtu.be

The URL that will play correctly:

https://www.youtube.com/watch?v=mx6-zsFCoj8

Hit "Submit for Review" to save your changes, and check your campaign page again. Your video should play without a hitch!

Option 2.

If you have a URL that begins with https://youtu.be/ like the example below, please delete it and replace it with the full https://www.youtube.com/ version.
Make sure you're copying the link from the address bar, not from the "Share a link" bar.
Then delete any text beginning with "&" onward. (These steps are outlined in more detail above in Option 1.)

Your original URL:

https://youtu.be/mx6-zsFCoj8

The URL that will play correctly:

https://www.youtube.com/watch?v=mx6-zsFCoj8

Hit "Submit for Review" to save your changes, and check your campaign page again. Now your video should play properly!

If you continue to experience difficulties, give us a call or email us at success@ioby.org. For help uploading a video to your campaign page or for troubleshooting problems with a Vimeo video, check out our Support Center.
Why isn't my Vimeo video displaying properly?

Is your Vimeo video not displaying properly?

You uploaded a Vimeo video to your campaign page, however, the poster frame or video thumbnail is not appearing properly on your campaign page like the image below. If this is happening to you, please read on.

Your Vimeo video is more than likely not displaying properly due to your Vimeo sharing settings.

To check your sharing settings, first log into your Vimeo account. After logging in, go to Manage Videos > My Videos. Then, click on the video you want to adjust the settings for. You should see a page that looks like this:
Make sure the following selections are made:

**Who can watch? = Anyone**

**Where can this be embedded? = Anywhere**

**Who can comment? = No one**

Don't forget to save your changes!
Check your work

After updating your Vimeo sharing settings, navigate over to your ioby campaign page, and refresh it. When your page reloads, you should be able to see your video displayed properly!

If you continue to experience difficulties, give us a call or email us at success@ioby.org. For help uploading a video to your campaign page, troubleshooting problems with a Youtube video, or other FAQs, check out our Support Center.
How to use match dollars to leverage more donations

What are match dollars?
Have you ever heard someone say “If you donate $10, I’ll match it and donate another $10.” Or “. . . I’ll match it and donate $20”? For ioby campaigns, match dollars are additional dollars that are contributed at or above a donation amount.

Why should I look for match dollars to use with my campaign?
Match dollars are a great way to leverage more donations. For example, the Youth Leaders Board project, on average, raised $77 per day over the course of their campaign. But in two days of having match dollars available, they raised $787 per day. Donors love to see their money doubled or tripled!

What does the match donor get out of it?
When the match fund is set up for your campaign, we add a banner to your page and a separate landing page to describe the match in more detail. The match donor can be recognized, if they would like, in both places. Additionally, they get the satisfaction of knowing their money will help you get more donations.

How do I ask for match dollars?
First, make a list of the people, organizations or other potential sources of funds that might be able to provide match for your campaign. Match works best when it’s $500 or more. In most cases, you will want to ask for more than you expect to allow space for the potential match donor to come down from your ask.

So what should you say when you ask? Emphasize your story, the impact of your work, and how they can play a special role in the success of your campaign by providing match. Here’s a sample script:

“Hi Sheila! Good to see you. I’m so glad that we could meet up today. As you may recall, we’re running a crowdfunding campaign on ioby to raise money for our community garden project. Last year we taught 100 kids how to plant and harvest vegetables for themselves and we want to triple the number this year.
Our campaign is off to a good start and we’re working to get some more strategies in place to help us hit our milestones of 50%, 75%, and ultimately 100% raised. Right now we are raising match dollars—one of the most effective ways to increase donations. Our campaign can be set up with a match fund that allows donations to be matched in real-time. Donors love to see their money doubled or tripled!

*Would you be willing to donate $X in match funds? It would be a great way to help us leverage more donations to help more kids learn about growing their own food.*

If they say yes, continue with the following.

*Thanks so much! We’re so thankful for your generosity! Would you like to be recognized on our campaign page as the donor?*

*I will send you detailed instructions later, but basically you’ll mail the match dollars to ioby and then they’ll set up a match fund specifically for our campaign. Thanks again!*

**Can I use grant dollars as match dollars?**

Yes. Sometimes you may receive a grant you’d like to use for match. You can ask your funder to mail the check to ioby, following the directions in the next section, or if you’ve already deposited the grant check, you can make a donation to your own campaign.

**How do I set up match dollars for my ioby campaign?**

1. You find a donor willing to give you $500 or more in match.
2. Contact your Leader Success Strategist to let them know you have a match donor.
3. Send your donor these directions for sending the match check to us:

   *Write a check out to ioby with the match fund amount and “Match fund for [insert the name of your campaign]” on the memo line.*

   *Send the check to ioby at:*

   - ioby
   - PO Box 4668 #74253
   - New York, NY, 10163-4668

   *If you would like to receive a tax receipt for your check donation, please include a note with the check requesting a receipt and list your name, email address and phone number.*

4. Work with your Leader Success Strategist to set up your campaign page to notify your donors about your match opportunity, draft strategic match language to use in your communications
as you ask for donations, and choose a time frame to have the match available to create urgency.

5. Watch the momentum of your campaign build!
My campaign is part of a matching-funds program. How can I leverage the match for more donations?

So you have matching dollars from one of our ioby match programs or from a large personal donation? That’s great news! The next step is leveraging your match opportunity to boost donations to your crowdfunding campaign.

Your project has matching funds, now what?

You and your teammates have an extra ingredient of motivation to share with your donors: a match challenge! Every donor now has the chance to double their impact! And we think that's pretty exciting news to share early and often during your fundraiser.

First, reach out to your closest networks of friends, family, and colleagues and let them be your first investors! In those first few weeks, only send your page to the people who love you and trust you enough to donate even when you're still at $0. As you reach out to your first group of donors in your Soft Launch to ask for their early support, share with them that their early donation is important to you and to the project's success.

Things to include in your email

How you communicate your match opportunity to your donors is important, so here are a few things to consider when asking your donors to support your matched crowdfunding campaign.

1. Be sure to share there is more money on the table! Let people know that their donation will be doubled.
2. Share your story and what is in it for the donor. Try to answer these questions:
   - Why are you doing the campaign?
   - Where is the money going?
   - Who is it going to impact?
   - What is the money going towards?
3. Add a photo. People love seeing smiling faces and pretty landscapes, plus, it adds a little color to your email.

Example emails

Here's a simple email template for asking potential donors for donations to your matched crowdfunding campaign:

   Subject: Help us meet our goal in double time!
Body of email:

Greetings ADD FRIEND / FAMILY MEMBER NAME,

Giving is caring! For a limited time, your donation to our project [insert campaign page link] goes twice as far!

Thanks to matching dollars given by ioby through the ConEd match. For every dollar you give, your gift is doubled up to $1000, so give today!

Your donation will help (make this section applicable to your project):

1. further our mission of environmental stewardship and youth development
2. create notable improvements in local parks and green spaces
3. make our environment better and greener for generations to come

Sharing your love for your community will help all of us. Donate today [insert campaign page link]!

Sincerely,

YOUR NAME

In the example email below, you'll notice how this team included several components in their announcement:

- a clear call to action (make a donation)
- a sense of urgency and importance for the donation (help us win an extra $5,000)
- a due date for this action (this Friday)
- a heads up that they'll hear from you soon (you'll follow up with a call)

Subject: Help us win an extra $5,000 for Healthy Lunch Brooklyn

Body of email:

Greetings ADD FRIEND / FAMILY MEMBER NAME,

I am writing to share some exciting news. Today we launch our crowdfunding campaign on ioby with up to $5,000 in matching funds! We need to create a big buzz around the launch in order to win as much of the $5,000 as possible for our project. With the funds we can continue to change lives by providing healthy farm-fresh lunches. You can view our campaign LIVE this at: [insert campaign page link]

This is where you come in. The most successful campaigns raise 25% of funds in the first few weeks by getting friends, family and like-minded colleagues to commit to donating up front! I'm asking you to help us out. Donate [insert campaign page link] $50, $100, or whatever you can by this Friday, [insert date]. By doing this you are creating the momentum we need to win up to $5,000 in matching funds and reach the finish line!

Every dollar counts and during this match challenge and your donations will be doubled! By being one of our first 25 donors you will help build the early and essential momentum we'll need for our project to bring [insert project outcome].
Please help us make our dream a reality by making your donation by this Friday, [insert date] here: [insert campaign page link]

I will be following up over the next few days with a quick phone call to share more about our community building project!

Sincerely,

YOUR NAME

Don't forget to follow up

After you send that email or text, set a date to call or visit with the folks on your soft launch list that haven't yet responded. This could take 3-4 nudges, but each nudge is still very important.

Want more tips?

Check out our guide, Soft Launch: The Smart Start to Fundraising, for more tips to get your fundraising campaign off the ground.

For more help on making your asks, check out this guide to asking for donations.

And if you're stuck, reach out! We're here to help. Your Leader Success Strategist will guide you through other tips and strategies that fit your team's needs. Call 917-464-4515 x 7 or email success@ioby.org.
How can I use social media to boost my fundraising?

We live in an era where social media dictates how we interact. When it comes to fundraising, social media can also be a great tool for you to reach out to potential donors.

When using social media, keep in mind that social media is often great for:

- **Building buzz.** If donors hear about the campaign from multiple sources—like in person and on social media—they'll likely perceive that the campaign is successful and will be more likely to donate.
- **Storytelling.** Get the project story out there and see who reacts. Then, follow up with social media contacts and make a direct fundraising ask.
- **Thanking donors.** Double impact! First, your donor will feel appreciated by your public expression of gratitude (provided that they have chosen to give publicly, not anonymously). Second, you'll reach new networks of potential donors by tagging your donor in your thank you post.

But note that social media is NOT great for asking for donations. You can expect only about 0.5% of your social media followers to donate, so it's best if you focus your time and energy on making direct asks. Be wary, too, of spending money to advertise on Facebook to get more folks to see your post and give. Unless you spend a sizable amount of money and spend time customizing a sophisticated online campaign, it likely isn't worth it.

Here are a few tips to help you get the most out of fundraising on social media

- **Stick with sharing your story.** This is still just as vital on social media as it is for in-person asks, so make sure you are telling a full story. There are ways to bring people in, share anecdotes from people in the community that are connected to the project, share your why, share what you are doing so people can invest in your project. Here's an example:
• **Try new mediums.** Add photos or make a video to help people connect with the project. Posts on social media that have media connect to them, such as photo or video, are more often seen and clicked on, so be sure to put your best foot forward.

• **Make a plan.** Although think you are reaching everyone you are friends with or everyone that has liked your organization's page, the reality is you're not. Due to many of the algorithms built into different platforms, you are actually only reaching about 10% of your audience. One way you can get more reach is posting consistently. The best way to ensure this is by building out an editorial calendar and planning out templates for your post. Shoot for about 20% of your posts containing direct asks.

• **Pick your main outlet.** There are so many platforms to choose from, and that can be hard to manage. We suggest picking one or two platforms as the main place you share your campaign and tailor your asks to these platforms and the connections you have on each. This will create consistency for your donors.

• **Make it easy to share.** Because sharing is easy, social media is great for getting the word out! Share posts or links to your campaign to generate calls to action. Make it even more interactive by creating a hashtag. This way when people share, you can track it and thank them, or interact with their networks. Here's an example:
• Publicly thank your donors. **Thanking is important**, and donors are more likely to reshare your post if you recognize them. They can then share your post and invite their network to give.
@Angela, you’re my crosswalk hero! You’ve just made it safer for our neighbors to cross the street & play at the park at ioby.org/grandave!
I'm hosting a fundraiser for my campaign. What is the best way to collect donations in-person?

The best way to collect tax-deductible donations at the fundraising event is to have a computer on hand where folks can donate online.

We can also accept tax-deductible check donations on behalf of your campaign. Donors would need to make the check out to "ioby" with "[Your Campaign Name]" listed on the memo line. If they'd like to receive a tax-deductible receipt, they'll need to also include a note with their email address, requesting the receipt. Check out this article for important information about collecting check donations for your campaign.

Unfortunately, we cannot issue tax receipts to those individuals who donate with cash.
How do I use Square to collect donations during a fundraising event?

Create a Square account

If you think you'd like to accept Square donations at your next event, the first step is to set up a Square account that is registered with ioby. To do this, reach out to your Leader Success Strategist for assistance at success@ioby.org or (917) 464-4515 ext. 7. Your Strategist will add you as a point-of-sale person for ioby, and then they will email you an invitation from Square inviting you to create an ioby Square account. Follow the directions in that email to create your account password.

After you've set up your ioby Square account, [download the square app to your mobile device](#) (and all other devices you plan to use) and log in with the same ioby Square login credentials.

Obtain your Square device

It certainly helps things along if you already have the Square reader in hand. If you don't have one already, you can [request a free e-reader from square.com](#).

*Keep in mind that the shipping time may take up to 3 weeks.*

If you're running low on time for your free e-reader, you may also purchase a device for $10 at [participating retailers](#).

Collect donations and donor information

After you register your Square account and have your device in hand, you may start accepting donations for your ioby account.

*Please note: donations to your campaign will not reflect immediately on the site. Processing Square donations can take several days and may not appear on your campaign page for 2 or 3 business days. Also, the names of those who donate using Square will not appear under the donors tab on the site.*

Square will send your donors receipts, but this receipt will not contain language surrounding the tax-deductibility of their donation. So in order for ioby to provide your donors tax-deductible receipts, this information will need to be collected by you or a member of your team at the time the donation is made. We need the following information in order to send your donors a tax-deductible receipt:

1. first and last name
2. email address
3. donation amount
You're welcome to collect this donor information on the sheet attached below. After you've collected this information please scan it or take a photo of the information post-event and send it to us so that we can verify each Square donation.

**Troubleshooting**

Square isn't entirely easy to integrate with, but this process is one we're working to streamline. We will do our best to help you with your Square device, but additional support or help may be found on [Square's website](https://squareup.com).

PDF  Square_eventdonationlist_10.15.14.pdf
Things to know about Giving Tuesday and end of year fundraising

If your campaign happens to land in the fall and winter time, you might want to take advantage of Giving Tuesday and Year End Giving campaign. Think of these events of powerful tools to shape your messages to donors around to help supercharge giving to your campaign.

What is #GivingTuesday?

You've likely heard of “Black Friday” and “Cyber Monday,” the days following Thanksgiving when businesses urge consumers to make holiday purchases. In 2011, several nonprofits came together to come up with #GivingTuesday—a campaign to remind folks to give generously, alongside their spending sprees. It's since become known as the global day of giving, which can super helpful for your own ioby campaign.

What is a Year End Giving campaign?

Nearly one third of all charitable gifts in a year occurs in December. 12% of ALL giving occurs during the last 3 days of the year. That makes these days an incredibly important time for your campaign. Many donors give to meet the year end tax deadline, while others might give generously to get into the spirit of the season.

Whatever the reason is, if you want to take part and try and give your campaign a boost, you'll want to plan well in advance. Many nonprofits plan campaigns around the giving season starting in October, with consistent messaging and asks leading up to #GivingTuesday in November, and New Years Eve in December.

So you want to participate in #GivingTuesday and/or Year End Giving. Here's what to expect.

It's an exceptionally charitable time of year, and LOTS of nonprofits know that and what to take advantage of it. Here's what to expect if you choose to run a #GivingTuesday or Year End Giving campaign:

• High competition. In 2016, more than 40,000 nonprofit organizations raised funds on #GivingTuesday. That's a lot of groups competing for the same limited amount of donor dollars, not to mention the competition you'll face with holiday shopping and travel.

• Lack of familiarity. While 93% of consumers are familiar with Black Friday, just 18% are familiar with #GivingTuesday. Keep that in mind when you think of the messages you'll share with your potential donors.
• **Donor fatigue.** As you can probably attest to, most folks will get **dozens** of emails and their social media feeds will be flooded with asks for donations come years end. Think of creative ways to cut through the noise. Can you make direct, personal asks via phone, text, or email? Can you activate your previous donors to make personal asks on their social media, maybe featuring a video about why they're giving?

**If you’re planning to participate in #GivingTuesday or run a Year End Giving campaign, use these steps to set and reach your goals:**

1. **Define success.** How much money are you trying to fundraise during #GivingTuesday or Year End Giving? Make this goal clear to your entire fundraising team. Maybe it's a percentage of your campaign's fundraising goal, maybe it's a specific dollar amount, or maybe it's your entire campaign fundraising goal. Just be sure it's clear and communicated to your team.

2. **Read our fundraising the toolkits and resources.** Especially [#GivingTuesday's toolkit](#). Search “Year End Giving Resources” or “#GivingTuesday Toolkit” on our website to find a trove of tips!

3. **Plan.** The [#GivingTuesday organization suggests](#) starting to plan in August. Some organizations begin Year End Giving campaigns even earlier! As soon as you decide to participate, draft a timeline for #GivingTuesday or Year End Giving. This timeline should include one or two communications pushes each week, starting in October. Then, on #GivingTuesday and/or December 31st, plan an hour-by-hour breakdown of phone calls, pre-scheduled personalized emails, and social media posts. **Social media will not be enough for a successful #GivingTuesday campaign.** You'll need to plan other direct outreach (phone, in-person or personal emails) in addition to social media and e-blasts.

4. **Make it look good!** To spiff up your social media posts, use an infographic maker like [Piktochart](#) or [Canva](#). Or, see a list of [other options](#) here. Sharing an eye-catching infographic about the impact donations have on your project will help your social media posts rise above the rest.

5. **Perfect your project story.** Remember, lots of people are competing for a limited amount of donor dollars, so your campaign will need to stand out. Emphasize the impact of your project to tug at heart strings and convince your donors to give generously to your campaign. On a regular cycle, it might take four asks spaced out over the course of a few days or weeks to get a potential donor to give. Plan for up to 12 on #GivingTuesday. Take advantage of [ioby’s guide to telling your story](#), with real-life examples of your campaign stories, to write your story and prepare it for your #GivingTuesday and Year-End Giving Campaigns! Another thing suggested by [Mobile Cause](#) is to segment your audience with the size of the ask and the communication size. The goal with this plan is to retain and steward your donors for future giving.

6. **Look for new donors.** 63% of #GivingTuesday donors only gave on that day and no other time, so try to seek out new donors because they are more likely to stay engaged.
throughout new projects in the year. Can you tap friends to reach out to their friends that you might not know? Maybe take a leap of faith and ask some folks you haven't spoken to for a year, but who you know are passionate about a similar thing as your project idea?

7. **It's not just about the money.** Ask for volunteers, or for help from people to share your campaign in new and interesting ways like in the un-selfie so they can engage their network to get more donors.

8. **Follow the plan, but don't forget that you can always tweak it if you need to.** New donors that you know will need special attention? Did you plan on emails for a big chunk of dollars, but find that emails don't result in much giving? Stay flexible, and adjust your plan, especially if you find one tactic is yielding you more gifts than another.

9. **Don't forget to thank your donors.** It might seem obvious, but nothing is worse than giving generously and not receiving any thanks for it. It's nearly a guarantee that they won't give again the next time you ask, and you want the list of folks you can tap for donations to grow, not shrink! Thanking your donors is an easy way to make sure that they feel good about giving, and will be ready to give the next time you ask. If possible, thank them publicly—it'll help you engage your community, and just might lead to new donors the next time around! Consider thanking them when you share the results of your campaign, or when you've implemented your campaign. Everyone loves to see what they've contributed to.

Want to read more? [Check out our blog post](#) on crowdfunding during and after the holidays.
Do I need to report money crowdfunded with ioby as taxable income?

For leaders with projects fiscally sponsored by ioby:

ioby cannot provide any financial advice to the project leader about the tax filing requirements of project disbursements. We recommend all fiscally sponsored project leaders to consult with a financial professional. As long as proof is provided to ioby that all project disbursements are spent toward the stated charitable purposes of the project, it is generally ioby's practice to not issue 1099-MISC for project disbursements.

For leaders with projects that are fiscally sponsored by organizations other than ioby:

Please get in touch with your fiscal sponsor organization for guidance regarding your disbursement.
Do I need to submit a copy of my organization's or fiscal sponsor's nonprofit letter of determination?

Yes.

If your organization has its own 501(c)3 status or you are receiving fiscal sponsorship from a 501(c)3 nonprofit organization, we will ask for a copy of the organization's 501(c)3 letter of determination issued by the IRS. This must be a federal determination from the IRS, and cannot be from a state-issued determination.

If you are a tax-exempt government entity, you may provide a Governmental Information Letter from the IRS.

Here are a few examples of items that will NOT suffice as documentation:

- Employer Identification Number (EIN or FEIN)
  - An EIN is assigned to all registered business entities operating in the United States and are not unique to nonprofits. Therefore, it is not sufficient documentation to submit to ioby to confirm an organization's 501(c)3 status.

- State-issued tax exemption letter or state-issued nonprofit status certificate/letter:
  - State documentation of nonprofit status is not sufficient proof of federal nonprofit status. ioby requires documentation of federal nonprofit status, and can only accept documentation issued by the federal IRS.

What if I don't have an IRS-issued 501(c)3 letter of determination?

If your organization has lost their nonprofit determination letter, you may request an affirmation letter from the IRS and provide that to ioby.

If your organization is not registered as a nonprofit organization under IRC Section 501(c)(3), you may:

- Apply for federal nonprofit status
- Seek a third party nonprofit fiscal sponsor
- Use ioby's fiscal sponsorship service
I am tax exempt, but not a 501(c)3. Can I submit something other than a nonprofit letter of determination?

Yes.

If you are not using ioby's fiscal sponsorship service you must provide proof of tax exemption. For most, that will be an Affirmation Letter or Determination Letter from the IRS. (Please note, state-issued letters are not accepted. Documentation must be federally-issued from the IRS.)

For all other tax-exempt entities, you must provide a Governmental Information Letter. Instructions on how to obtain a copy of your IRS-issued Governmental Information Letter can be found here.

If you are a school, a religious institution, or a 501(c)7, proof of tax exemption will vary depending on your state and incorporation status. Please consult with your tax professional about appropriate documentation for your federal tax exempt status. If you have more questions or need further clarification, please reach out to your Leader Success Strategist at success@ioby.org.
What do I need to close out my campaign and access the funds raised?

Once you've reached your crowdfunding goal or are ready to stop crowdfunding and receive payment, please email your Leader Success Strategist to close out your campaign. You can contact them at success@ioby.org or by calling (917) 464-4515 ext. 7.

The steps you'll need to take to access your funds will depend on whether or not your project is fiscally sponsored by ioby or by another nonprofit.

- [Click here if you have your own 501(c)(3) status](#)
- [Click here if you are fiscally sponsored by another organization](#)
- [Click here if you are fiscally sponsored by ioby](#)
I’ve finished fundraising, and I have my own 501(c)(3) status. How do I close out my campaign and access the funds raised?

1. Notify your Leader Success Strategist

Once you've reached your crowdfunding goal or are ready to stop crowdfunding and receive payment, please email your Leader Success Strategist to close out your campaign. You can contact them at success@ioby.org or by calling (917) 464-4515 ext. 7.

2. Gather documents and payee contact information

Confirm the name and contact information for the person at your organization who will be responsible for receiving the funds or administering your program, and send that information to your Leader Success Strategist. If this is you, just inform your Leader Success Strategist.

Email us a copy of your organization's federally issued tax exemption letter from the IRS. This must be a letter issued by the federal IRS, and cannot be a state exemption letter. For a few notable exceptions which may provide different documentation, please see this support center article.

3. Confirm your budget

Because of ioby's flexible finish policy, some teams may raise more, or less, than they originally expected. We'll ask you to confirm and update your project budget based on the total amount of funds that you actually raise (after subtracting fees). For instance, if you raise more than what you originally expected, be ready to tell us how you plan to spend the additional money on your project.

At this point, your campaign will no longer accept donations but will remain live at ioby.org for you to post updates and share progress with your donors.

4. Sign an electronic agreement

Once we've received your IRS issued tax exemption letter, payee contact information, and confirmed your budget, ioby will send you or the appropriate contact your project contract. This
contract will be delivered and signed electronically by ioby and by you or your payee contact who will provide the payee information and address.

5. Celebrate with a big thank you

You’ve probably thanked your donors along the way as they’ve made their gifts to your ioby campaign, but reaching your goal is a big milestone. Although not required to receive your funds, we recommend celebrating and thanking your donors at this stage, and set yourself up for future success as well. There are several ways to do this, and your Leader Success Strategist can help you leverage your campaign page’s “Updates” feature to celebrate your success.

6. Receive your funds and implement your project

We'll review your contract and send your funds by check or by secure e-payment, whichever is specified on the electronic agreement. You can expect to receive it within 5-15 business days. This is a little longer than our normal wait time so we will do everything we can to get it to you sooner.

Please note that if you raise more than $50,000, your disbursement timeline may be impacted. Speak to your Leader Success Strategist about receiving payments larger than $50,000 by emailing success@ioby.org.
I’ve finished fundraising, and I am being fiscally sponsored by another 501(c)(3). How do I close out my campaign and access the funds raised?

1. Notify your Leader Success Strategist

Once you’ve reached your crowdfunding goal or are ready to stop crowdfunding and receive payment, please email your Leader Success Strategist to close out your campaign. You can contact them at success@ioby.org or by calling (917) 464-4515 ext. 7.

2. Gather documents and payee contact information

Send your Leader Success Strategist the name and contact information of the person who will be responsible for receiving your funds at the organization that is fiscally sponsoring you.

Email us a copy of your fiscal sponsor’s federally issued tax exemption letter from the IRS. This must be a letter issued by the federal IRS, and cannot be a state exemption letter. If you don’t have access to this document, we can obtain it from your fiscal sponsor.

3. Confirm your budget

Because of ioby’s flexible finish policy, some teams may raise more, or less, than they originally expected. We’ll ask you to confirm and update your project budget based on the total amount of funds that you actually raise (after subtracting fees). For instance, if you raise more than what you originally expected, be ready to tell us how you plan to spend the additional money on your project.

At this point, your campaign will no longer accept donations but will remain live at ioby.org for you to post updates and share progress with your donors.

4. Sign an electronic agreement

Once we've received your IRS issued tax exemption letter, payee contact information, and confirmed your budget, ioby will send you your project contract. This contract will be delivered and signed electronically by you, ioby, and your fiscal sponsor who will provide the payee information and address.
5. Celebrate with a big thank you

You've probably thanked your donors along the way as they've made their gifts to your ioby campaign, but reaching your goal is a big milestone. Although not required to receive your funds, we recommend celebrating and thanking your donors at this stage, to set yourself up for future success as well. There are several ways to do this, and your Leader Success Strategist can help you leverage your campaign page's “Updates” feature to celebrate your success.

6. Receive your funds and implement your project

We'll review your contract and send your funds to your fiscal sponsor by check or by secure e-payment. Your fiscal sponsor can expect to receive it within 5-15 business days. This is a little longer than our normal wait time so we will do everything we can to get it to them sooner.

Please note that if you raise more than $50,000, your disbursement timeline may be impacted. Speak to your Leader Success Strategist about receiving payments larger than $50,000 by emailing success@ioby.org.
I’ve finished fundraising, and I am being fiscally sponsored by ioby. How do I close out my campaign and access the funds raised?

1. Notify your Leader Success Strategist

Once you’ve reached your crowdfunding goal or are ready to stop crowdfunding and receive payment, please email your Leader Success Strategist to close out your campaign. You can contact them at success@ioby.org or by calling (917) 464-4515 ext. 7.

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At this point, your campaign will no longer accept donations but will remain live at ioby.org for you to post updates and share progress with your donors.

3. Sign an electronic agreement

After you have confirmed your budget, ioby will send you your project contract. This contract will be delivered and signed electronically by you and ioby.

When you sign your contract, you will also choose how to receive your funds—by e-payment or check.
4. Celebrate with a big thank you

**updates**

Our project is funded!

**POSTED 08/17/2015 - 5:16PM**

We reached our funding goal for our youth education program in the Bronx! Thanks so much to all who donated or helped spread the word! CUP and our Bronx high school students thank you!

Save the date for our launch event when the students will debut their video investigating “Who decides how much transit fare costs?” Join us Monday, September 21st, 7pm, at the Bronx Museum of the Arts. RSVP to info@welcometocup.org

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You've probably thanked your donors along the way as they've made their gifts to your ioby campaign, but reaching your goal is a big milestone. We recommend celebrating and thanking your donors at this stage, and set yourself up for future success as well. There are several ways to do this, and your Leader Success Strategist can help you leverage your campaign page's **“Updates”** feature to celebrate your success.

5. Receive your funds and implement your project

We'll review your contract and send your funds by check or by secure e-payment. You can expect to receive it within 5-15 business days. This is a little longer than our normal wait time so we will do everything we can to get it to you sooner.

*Please note that if you raise more than $50,000, your disbursement timeline may be impacted. Speak to your Leader Success Strategist about receiving payments larger than $50,000 by emailing success@ioby.org.*
6. Submit receipts

Send ioby copies of receipts for all the purchases made for your project. If you're making purchases in advance, be sure to save those receipts too. You can submit receipts to the unique link provided on your signed agreement.

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Thank you for all your hard work to fund your project on ioby!

1. Please read and sign the attached agreement in no more than 30 days.

2. As your project progresses, please update us on the status of your project by sending an email to success@ioby.org or calling (917) 464-4515 x7.

3. Please also send us photos or video of your project as it progresses. We love to showcase exciting content for donors to see all the great work we support.

4. Please note that you are required to upload copies of receipts for project-related purchases at the following custom link:

   https://ioby.tfaforms.net/2?projectID=70127000001Eg8P4iLID=06327000002eX9f

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ioby is my fiscal sponsor. Can I get a copy of an ioby W-9 form?

Yes. If ioby is your fiscal sponsor and you need to provide a completed Form W-9 for a grant you are applying for, please download [this completed Form W-9](#). It is filled out with ioby's tax information.
ioby is my fiscal sponsor. Can I get a copy of ioby's 990?

Yes. You can download a copy of ioby's most recent Form 990 [here](#).