How to Connect with Donors & Volunteers Through the Benevity Causes Portal

Now that you've successfully registered your charity at the Benevity Causes Portal (good job!) we're going to show you how to use your Charity Profile to attract more donations and volunteers from people using Benevity.

First, a (really) brief look at how Benevity works.
Benevity provides a donation-processing platform that companies use to power their workplace giving, matching & volunteering programs. People use our software to find their favorite charities – charities like yours – and make donations, have their gifts matched by their employer, and volunteer.

Here's an example of what someone searching for a cause close to their heart on their company's Benevity-powered Workplace Giving site sees:

Showing search results for 'Minnesota Youth Organizations'

SEARCH RESULTS *1 - 7* OF *98992*

TWIN CITIES YOUNG DREAMERS

Minneapolis, Minnesota, United States

View Cause Profile

DONATE NOW | TRACK TIME

MINNESOTA MENTOR OUTREACH

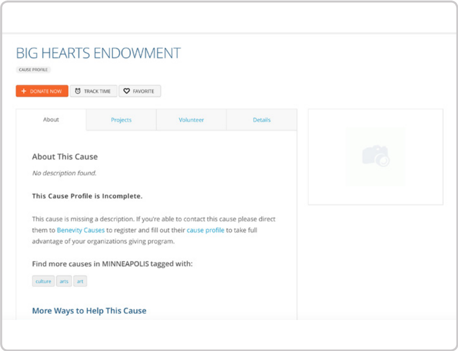
Saint Paul, Minnesota, United States

View Cause Profile

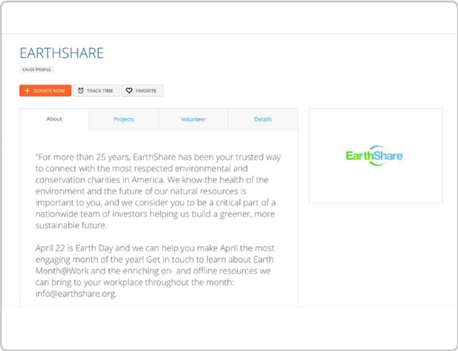
DONATE NOW | TRACK TIME

Stand out and get noticed by completing your Charity Profile!
We're going to show you how to connect with donors and volunteers who care about the social issue you're working hard to address. You can attract attention – and donations – from our users by:

- Completing your Charity Profile
- Creating Projects
- Creating Volunteer Opportunities



Here's how a Charity with an incomplete Profile appears

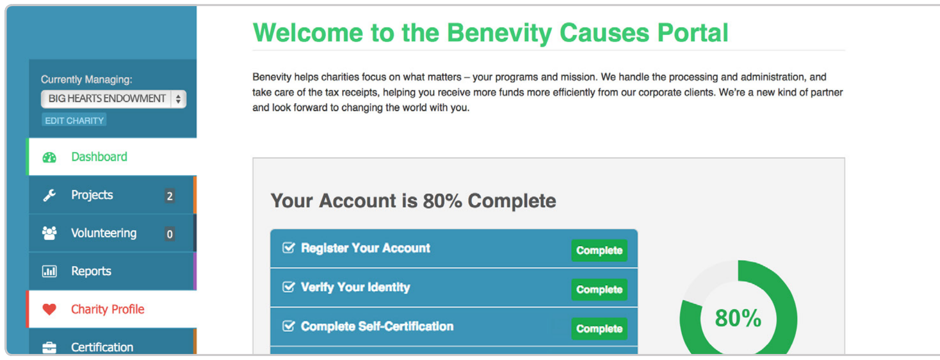


Here's a fully-registered, fully-activated Charity Profile

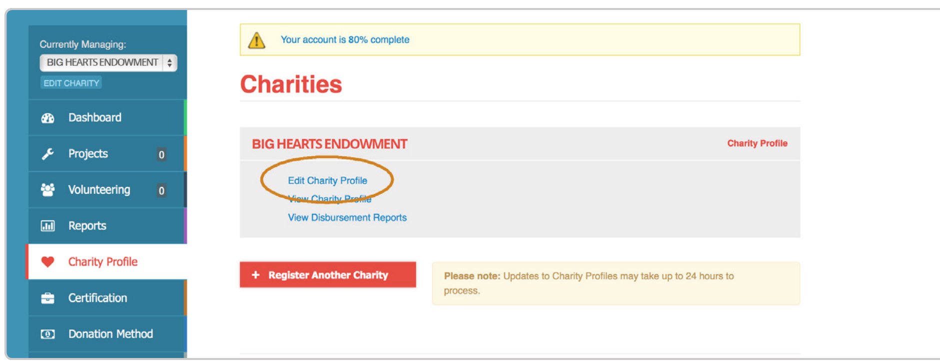
Step 1: Complete Your Charity Profile

Your Charity Profile is what appears to people using Benevity when they search for charities. The information, logo, pictures, website and Social Media links that you add here will be seen by anyone who finds and clicks on your organization in any giving site built on the Benevity Platform. Updating your profile helps you appear in relevant searches, and provides potential donors with the latest news about your mission and impact.

A Sign in to the Benevity Causes Portal and click **Charity Profile** in the left navigation of your *Dashboard page*.



B Click **Edit Charity Profile**.



C Complete the form, adding additional information in the fields provided:

Basic Info

• Add your organization's **Name**

Findability

• Include any **Search Aliases**. Is your organization known by other names? Add these here, so that people who search for you using these aliases will find you.

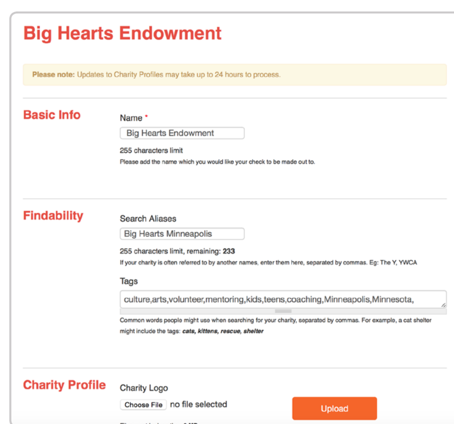
• Adding relevant **Tags** is another way to help people find your organization in their Charity searches. Add common words that people might use to describe your mission.

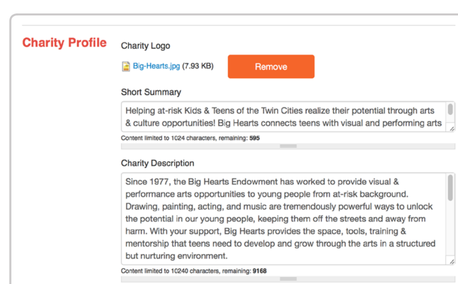
Charity Profile

• Upload your **Logo**. Your logo is a key part of your identity – including it helps people recognize you immediately while they search and browse.

• The **Short Summary** is a brief, high-level description of who you are and what you do. In a few sentences, state your mission and goals.

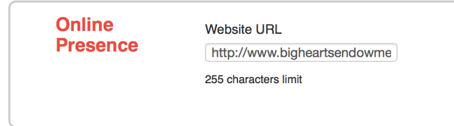
• The **Charity Description** is intended for longer, more detailed information about your organization.





Online Presence

- Use these fields to **add links** to your official website and Social Media sites, including your *Twitter Username, Facebook Page*, and *RSS Feed*.



Contact Details

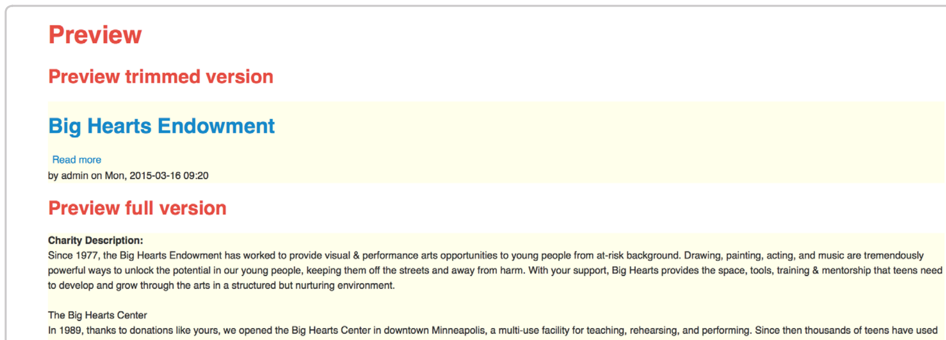
- Add all the **contact information** that you want to make publicly available through your *Charity Profile* here.

Reference ID

- Add the appropriate **Reference ID** *number* for your organization – for American charities, this will be your EIN or NCES number.

D Click **Preview** to review the content you've entered. Make any final edits if required, then click **Save** to update your *Profile*.

**Updates may take up to an hour to process, so don't worry if your changes don't appear immediately.*



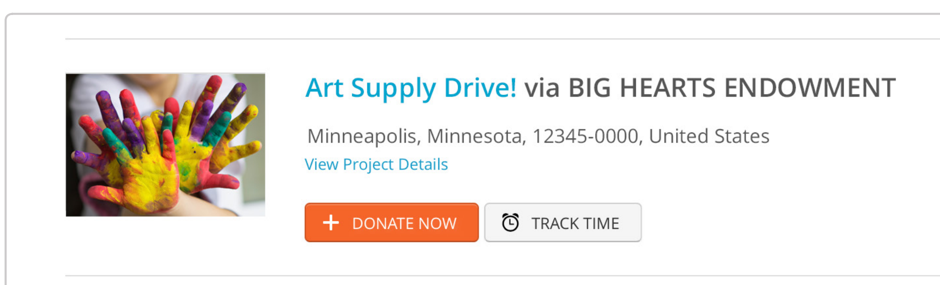
Tip: Update Frequently for Increased Attention
You can – and should – update your Charity Profile any time you like. Frequent updates to your Charity Description field allow you to keep a fresh presence with potential donors and broadcast the latest news about your activities and accomplishments. Have an update with impact stories from people helped by a recent initiative? Post it in your Charity Description. Have a new video about an issue related to a recently launched project? Add a Youtube or Vimeo link where people can see it.

Step 2: Create Projects & Chapters

Enable donors and volunteers using Benevity to support a specific fundraising initiative, or regional branches of your organization, by creating Projects.

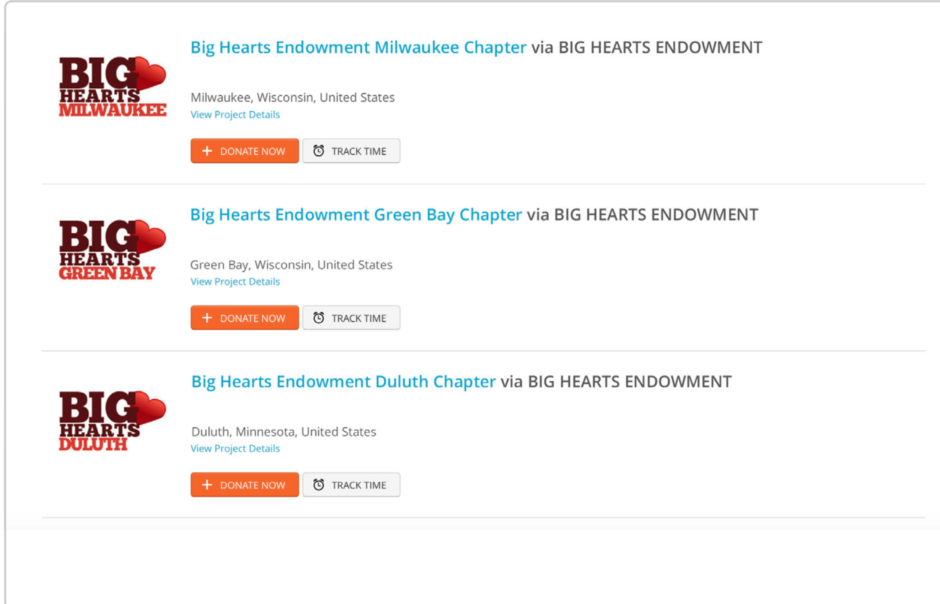
People using Benevity find Projects in their Search Results as separate instances of your organization.

When people donate to a Project, you receive the funds as usual in your monthly disbursement, with details indicating the Project the donation is intended for itemized in your Donation Source Summary report.

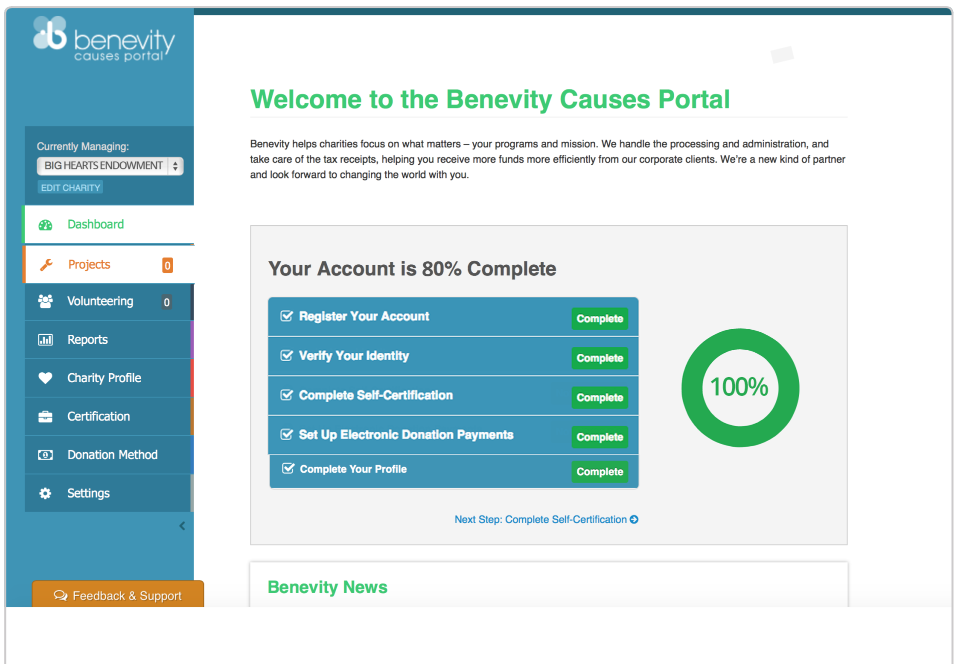


Examples:

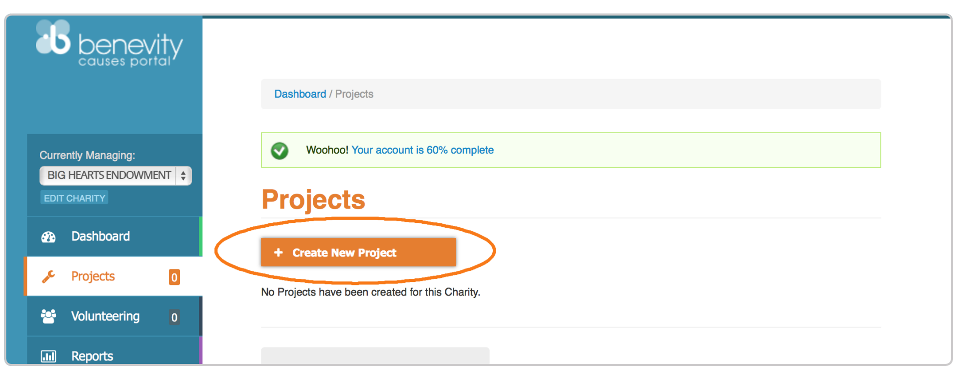
- You might set up a *Project* around a disaster relief effort (“Hurricane Recovery”, “Dealing with the Ebola Outbreak”), or as an appeal for help with a specific issue under your larger mandate. (“Help us build a new school”).
- If you are a large national organization with separate operations in several different cities, you can set up individual *Projects* for each of these *Chapters*. A Chapter is basically a Project for a regional subdivision of your organization.



A **Sign in** to the *Benevity Causes Portal* and click **Projects** in the left navigation of your *Dashboard page*.

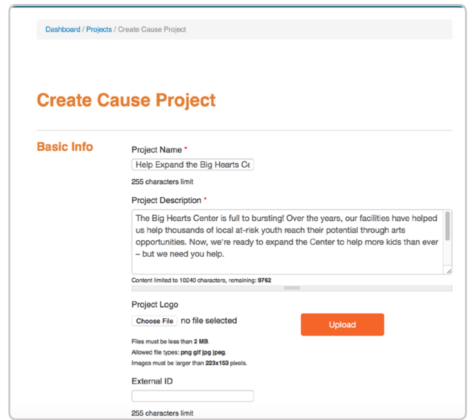


B Click **Create New Project**.



C Complete the form provided by filling in the fields with information about your Project:

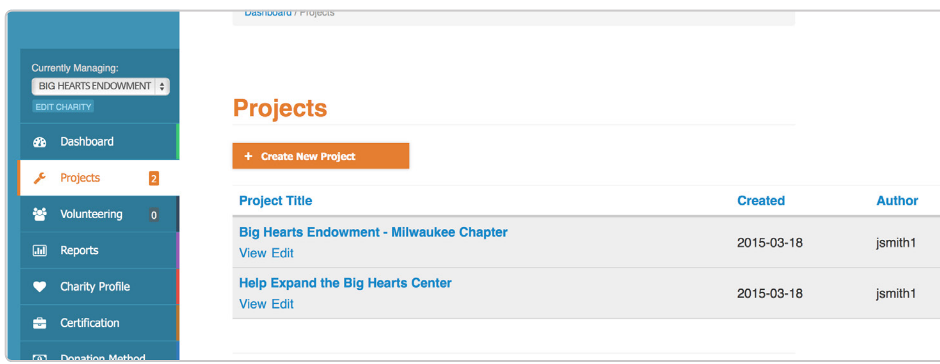
- Include the **Project Name**.
- Add a **Description of the Project** – the goals you're trying to achieve, and the impacts that you've achieved.
- Upload a **Logo**.
- You have the option to add an **External ID**. If you have your own *internal naming convention* for projects, for example, or an *existing reference number* for the project in your system, you can enter it here. If this field is left blank, we will generate a *random ID number* for the Project.
- If the Project has a deadline or fixed time period, you can add an **Expiry Date**.
- If you have a fundraising goal, add it as the **Goal Amount**.



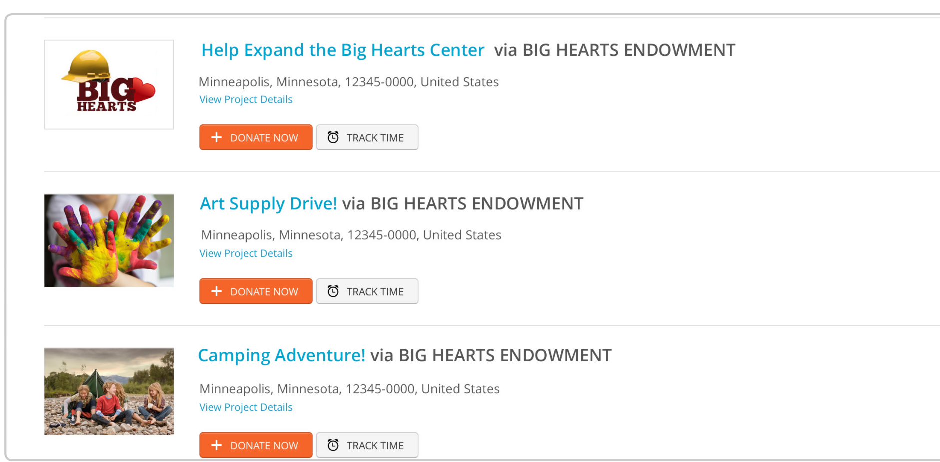
D Use the **Published** checkbox to set the visibility of your *Project*. Once it's Published, it will appear as part of your *Charity Profile*, and in *search results* for Benevity users. You can uncheck the box to save an *Unpublished draft* of your Project that will only be visible to you.

E Review the information you've entered and when you're satisfied, click **Save**.

Your new *Project* will now appear on your *Charity Profile* under "*Projects*". You can edit a *Project* at any time by clicking the **Edit** button.



Benevity Users will find your *project* listed under the *Projects* tab when they click on your public *Charity Profile*. They will also find it in relevant search results.



Creating a Chapter

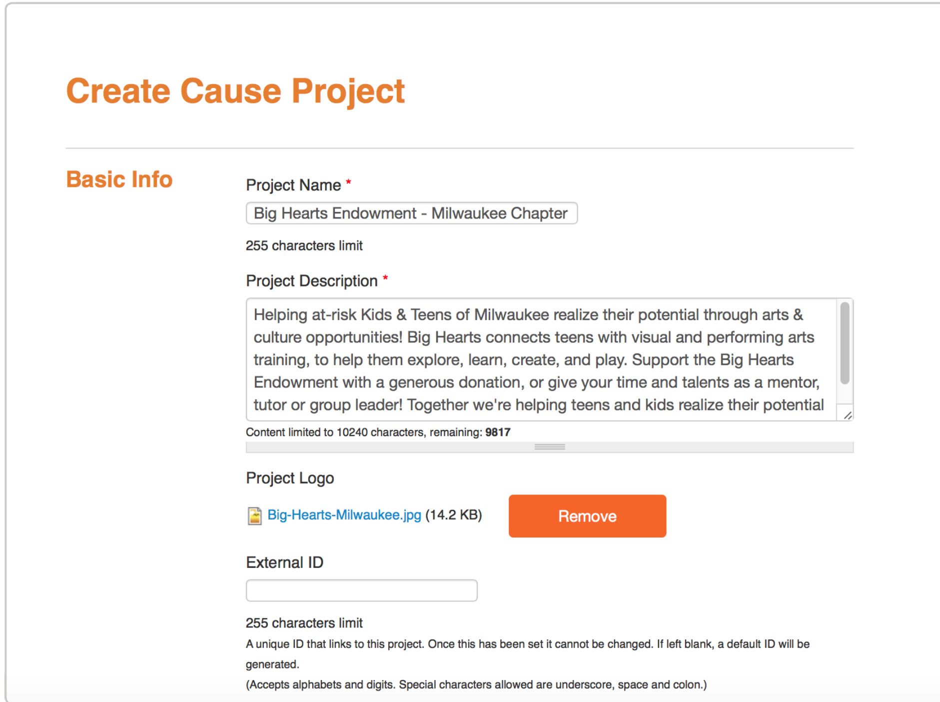
Follow the same steps to create separate regional Chapters for your organization.

A **Title** your *Chapter* using this naming convention: "*Your Organization Name – (City or Region) Chapter*"
For instance:
Big Hearts Endowment – Milwaukee Chapter

B Fill in the **Project Description** with information about the specific *Chapter*, and upload the appropriate **Logo**.

C Don't set an **Expiry Date**.

D Use the appropriate **address** and **contact information** for the *Chapter*.

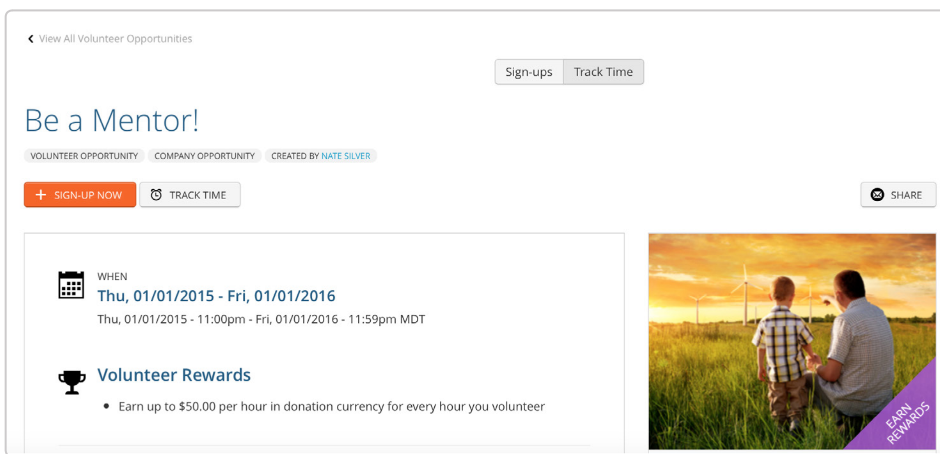


Step 3: Create Volunteer Opportunities

Help Benevity users support your cause with their time and talents by creating Volunteer Opportunities.

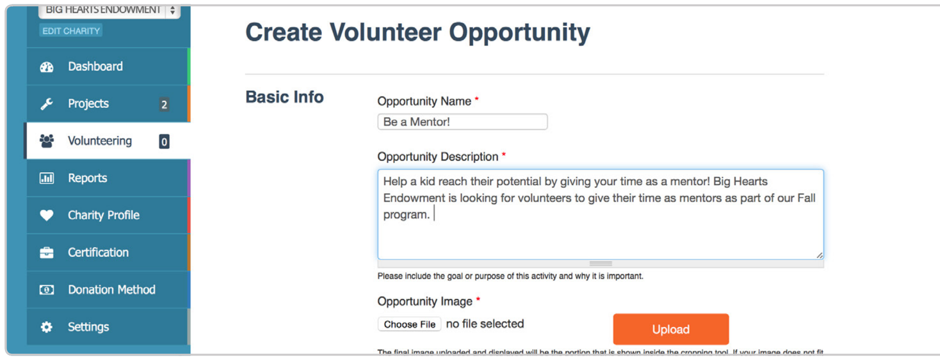
When people search for *Volunteering Opportunities* through their *Benevity-powered giving site*, they find relevant events based on their *location*, as well as their *personal skills & interests*. By regularly creating and publishing *Volunteer Opportunities*, you'll enable people interested in supporting your organization to *sign-up* and take part in your events.

Here's what a *signup page* might appear for someone participating in a *Benevity-powered Volunteering program*:

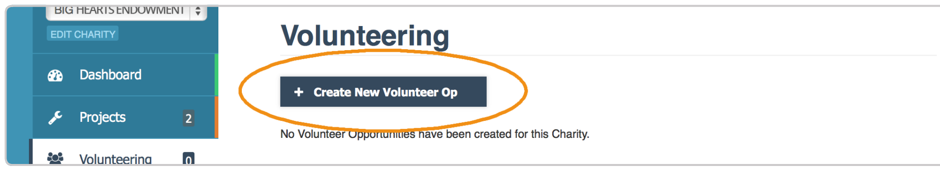


Creating *Volunteer Opportunities* helps more people find, connect with and support your organization.

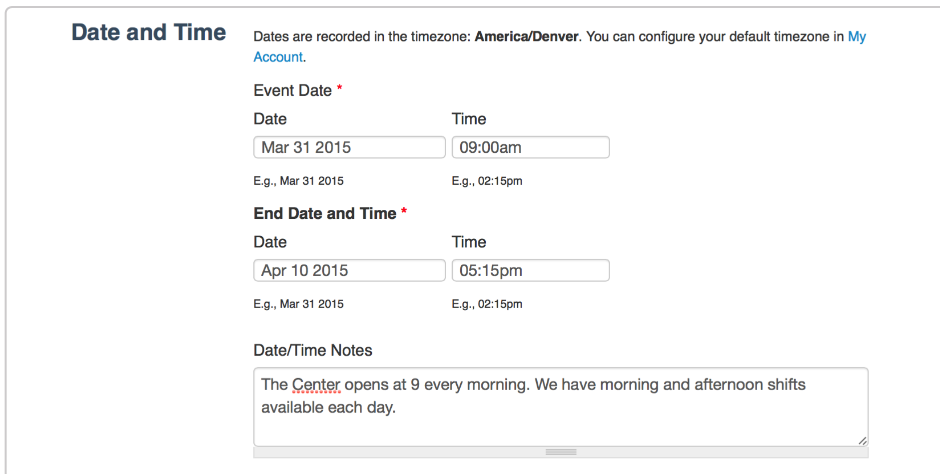
A **Sign in** to the *Benevity Causes Portal* and click "**Volunteering**" in the *left navigation* of your *Dashboard* page.



B Click **Create New Volunteer Opportunity**.



C **Complete** the form provided by filling in the fields with information about your event.



Basic Info

- Give your Opportunity a **Name**.
- Add an **Opportunity Description** that briefly explains the event, what people will be doing, and why it matters. Keep it short and sweet.
- Upload an **Opportunity Image**. This will appear on the *Opportunity details page*, and in search results. Choose a photograph, illustration or logo that grabs people's attention and gets them excited to take part.

Location

- If your Opportunity has no specific location, you can check the **This Opportunity has no location** box. Otherwise, use these fields to provide information about where the volunteering will take place.
- Add the **Location Name** – choose something descriptive and easy to understand.
- Fill in the **Address**.
- Add additional information, such as directions, in the **Location Notes** field.

Date and Time

• Use the fields provided to set the **Event Date**, and **start** & **end** times. Note that the *default time zone* is based on your location – you can edit this by clicking the **link** provided.

• Add additional information for volunteers in the **Date/Time Notes** field.

Volunteer Shift(s) Information

• You have the option to break your event into separate **Shifts** here. Fill in the Start and End times for your *shift*, then click **Add another item** to create additional *shifts*.

Contact Information

• Use these fields to provide **contact information** that people or companies can reach out to for more information about the *Opportunity*.

Skills & Interests

Adding **Skills & Interests tags** helps people find your Opportunity in their searches.

• Click the Drop Down **menu**, select a relevant **Tag**, and click **Add**.

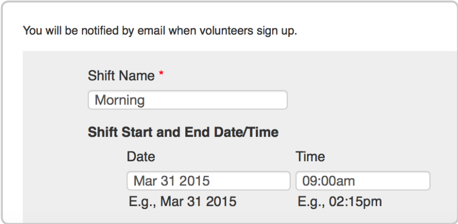
• Add all the relevant **Tags** that best describe the Interests your *Opportunity* will appeal to, and the Skills that will be helpful at the event.

Visibility

• Select **Visibility** to determine who can find your *Opportunity.*

• If you've created an *Opportunity* for a specific Benevity client company, select **Private**. You can then share the *Opportunity URL* with the company, which they can send to their own employees. Other Benevity users at different client companies will not see the Opportunity in their searches.

• Selecting **Public** will make your *Opportunity* visible to all Benevity users.



Keep People in the Loop – Update Your Charity Profile

Whenever you create a new Volunteer Opportunity, make a note in your Charity Profile! Update your Charity Description frequently with updates on your latest news, including your newest Projects and Volunteering Opportunity.

D Use the **Published** checkbox to set the status of your *Opportunity*. Once it's Published, it will appear as part of your *Charity Profile,* and in *search results* for donors and volunteers. You can **uncheck the box** to save an *Unpublished draft* of your *Opportunity* that will only be visible to you.

E Review the information you've entered and when you're satisfied, click **Save**.