

ONLINE GIVING



Ministry Partnership Program Guide

Presbyterian
FOUNDATION 

Getting Started



Read through this Guide.



Complete the attached Application & submit it to the Presbyterian Foundation.



Insert the *Give Now* button on your website.



Promote your new online giving method.



Manage the funds you raise using the Foundation's online tools.

Welcome

The Presbyterian Mission Exchange is an Online Giving program that is a simple and easy way to raise and manage funds for your mission or ministry. This tool is a major component of the Ministry Partnership Program, but there is much more. It is a creative online solution that provides resources to grow support for your mission while relying on a trusted partner to professionally administer and safeguard the funds you raise.

The program enables you to:

- Add a *give now* button to your website to encourage donations
- Accept online donations via debit/credit cards and direct transfer from a bank account – both one-time and recurring gifts
- Gifts are automatically acknowledged as they are received
- Access and manage your fund(s) and donor information online
- Transfer funds to your bank whenever you need them
- No need to negotiate merchant accounts or deal with complicated web set-up
- No startup or membership fees
- Create a profile page in the Presbyterian Mission Exchange to promote your mission
- Connect with more givers by sharing your mission with a larger audience

Web Services

An Online Giving Hub

Presbyterians are generous by nature – we are passionate about mission and give joyfully to the congregations, causes, and projects that touch our hearts and engage our minds.

The Ministry Partnership program offers your ministry a robust suite of online giving and funds management services. At the core of the program is the *Presbyterian Mission Exchange* – a giving hub with tools to connect donors to mission and facilitate easy online donations to Presbyterian congregations and ministries. Gifts from your members or supporters are made to the Foundation for the benefit of your church or ministry. The funds are available at any time by the ministry partner. This platform makes online giving easy and immediately available to any Presbyterian church or ministry.

The Presbyterian Foundation processes gifts made through the Mission Exchange’s online tools and ensures they reach their desired recipients. Online fund management tools allow you to:

- Monitor donations and fund balances
- Request withdrawals from funds raised
- Thank donors for their gifts and tell them about the impact of their donations
- Produce giving reports

Ministry Profile Pages

Make the case for your ministry by developing a profile page for your ministry. Your profile page can include photos and videos, along with your organization’s mission, and your vision for what will be done with the dollars you are seeking. Each profile page includes a *Give Now* button to make giving easy. The profile page is part of the Mission Exchange at **www.PresbyterianMissionExchange.org**.

Give Now Button

A *Give Now* graphic is available for you to add to your organization’s website, e-newsletters, and other online communications. The graphic connects the user to the online donation functions for your ministry. You may choose whether the graphic links to your profile page, or directly to the donation form.

Giving Options

Contributions and types of assets

Contributions are accepted at any time from anyone and can be made online or mailed to the Presbyterian Foundation. There is no minimum for contributions.

Online contributions

A simple online form allows users to make donations using debit or credit cards or a direct transfer from a bank account. Donors may also set up recurring gifts so their giving continues even when they are on vacation or cannot attend the service.

Other types of assets

- For marketable securities, please visit www.PresbyterianFoundation.org for security transfer instructions or contact the Foundation at 800-858-6127, extension 5919.
- For other non-traditional assets, such as real estate, farmland, and business interests, please contact the Foundation at 800-858-6127.
- For wire transfer instructions, please contact the Foundation at 800-858-6127.
- *Checks may be sent by mail to:*
Presbyterian Foundation
200 East Twelfth Street
Jeffersonville, IN 47130.

Gifts of all other types of assets will be reviewed by the Foundation prior to acceptance. Once the gift is accepted and received by the Foundation, a gift acknowledgement will be sent to the donor(s).

Fund Management

Opening your Ministry Partnership Fund

A Ministry Partnership Fund can be established by any Presbyterian Church (USA) congregation or any ministry aligned in mission with the Presbyterian Church (USA). To establish your Fund, complete the application at the back of this guidebook. You may establish multiple funds to address various projects, such as the *General Offering Fund*, *Outreach Ministry Fund*, *the Music Ministry Fund* or *Youth Ministries Fund*.

Naming your Fund

The name for your Ministry Partnership Fund is unique for your ministry. While the name you choose for your fund could indicate how the monies will be used, you may also choose to provide a description (the purpose) of the fund. For example a Music Ministry Fund without a specified purpose could be used for any area of your music ministry - to purchase choir robes, update equipment etc. If your Music Ministry Fund is only to be used for concerts performed by your choir you could list that as the purpose.

Please note, the funds raised must be used for the purpose you specify.

Accessing your Fund

As a safeguard, we recommend a minimum of two individuals, such as the pastor and treasurer or clerk of session, be given administrator access to your Fund. These individuals will have online access to information and administrative tools associated with your Fund, and will be the only ones authorized to:

- View information concerning donors and the amount contributed
- View Fund summaries
- Receive fund correspondence
- Request withdrawals
- Request administrative changes (i.e. - add/close funds, add/remove authorized fund administrators, etc.)

Withdrawals

Withdrawals can be made from your Fund at any time in the amount of \$100 or greater. Withdrawal requests must be submitted online by your Fund Administrator, and notifications of withdrawal transactions will be sent by email to the Fund Administrator requesting the withdrawal. Distributions of funds must be in keeping with the purposes you establish for your Fund and will be delivered by direct deposit.

Additional Information

You may establish new funds or close a fund at any time by providing written notice to the Foundation. Gifts to the Fund are irrevocable charitable contributions to the Presbyterian Foundation, with uses limited to your organization for the purposes you establish.

Donor Communications

Every donation received for your Fund will receive an automatic acknowledgement email to the donor from the Foundation. There is no need for your organization to provide gift acknowledgement to the donor. We will maintain all donor records.

The Foundation will provide you with access to the names and contact information of your donors (with the exception of any who have requested anonymity) so that you may also thank them and keep them updated about the ministry and mission to which they have contributed.

Promoting Your Fund

Offering online giving options opens all kinds of possibilities for growing your mission. To make the most of these opportunities, it's important that you tell your mission story effectively and often – and that you let your constituents know that these new giving options are available.

Use the *Give Now* button widely

The easiest way to connect people to your Fund is to place the *Give Now* graphic on your web pages, email newsletters, and other online communication. The Foundation offers a variety of graphics to choose from – or you may create your own. Link the graphic to either your profile page or the donation form. You can use the button:

- On each page of your **website** – especially those where you share information or stories related to the Fund's purpose.
- On **e-newsletters** – use these to remind constituents about the need and vision – and to update them on progress and the impact your ministry is having.
- In your **email signature** – at the bottom of every email you send.

Once is not enough

It takes a while for new information to sink in. Most people need to see or hear a message between seven and twenty-one times before it captures their attention and motivates them to act. Look for appropriate times and places to talk about your online giving options:

- Annual and quarterly giving statements
- Pledge materials
- At the offering time in Worship
- With a Minute for Mission
- In the church newsletter
- At new member classes and church information sessions
- On your Facebook page

What about the Plate?

More and more Americans find that the only check they write is their offering to the church. Those in younger generations may not even use a checkbook – preferring to handle all of their contributions and bills electronically. When churches pass the offering plate on Sunday morning, they may limit themselves to pocket change from those who feel obligated to put something in, but would give more with an online option.

Why not create a card or token which members who have signed-up for online giving can place in the plate. This has the dual advantage of eliminating feelings of awkwardness among churchgoers – and reminding others of the online giving option as the plate passes.

In addition, members will now be able to give whenever they like – 24/7. They may also choose to set up recurring gifts which ensure that their giving continues even on Sundays when they are not able to attend worship services.

Resources to promote Online Giving

The Foundation supports your efforts in promoting online giving and has developed several resources to help you.

- **Start-up Guide**- Three step approach to introduce online giving.
- Bulletin inserts that you can customize.
- Two posters – one to encourage online giving, the other as a goal chart to have a visible reminder of how the congregation is doing on reaching a goal.
- Pew cards – provide a means for online givers to participate in the offering during worship services, as well as promoting the online option to other worshipers.
- **Stewardship Companion** –This booklet offers suggestions for starting and promoting online giving at your church.
- Sample advertisement – you can customize this advertisement to use in your bulletins, newsletter or website.
- *Growing Giving*, a monthly enewsletter with helpful tips for your online giving program.
- Online print store for you to customize materials with your church name and your own pictures (or choose from the library). Determine your print quantity and place your order. The online print store will charge your church for the printing and shipping of these resources.

You can find these resources at www.PresbyterianFoundation.org. Click on the link to Print Resource Center.

Fees and Expenses

The Foundation will assess a one-time fee on each gift to pay its reasonable and customary costs of operations. This fee helps ensure the continued viability of the Presbyterian Mission Exchange. As of June 2014, the fee for all gifts received online is 1%. The fee for gifts received offline is 2% (i.e. - checks, stocks/securities, wires). Gifts using transfers from bank accounts (EFT) are not subject to additional fees.

Online gifts made via a transfer from a bank account (EFT) are not subject to additional fees. However, gifts made via credit/debit cards will incur an additional transaction fee. This fee is the actual expense incurred by the Foundation from a third party vendor for processing card transactions. The transaction fee is 2.598% + \$0.26 per donation.

For example:

- \$100 received online via credit/debit card will add \$96 to the church's fund.
- \$100 received online via bank transfer (EFT) will add \$99 to the church's fund.
- \$100 received via check delivered by mail will add \$98 to the church's fund.

All fees are subject to change.

Gifts of non-traditional assets may incur additional costs.

Please note: The full donation, which includes these deductions, is tax deductible to the fullest extent permitted by law. Please consult with a professional tax advisor for details regarding the tax deductibility of your donation.

At your service

Please send your completed application to:

Presbyterian Foundation
Attn: Mission Exchange Services
200 East Twelfth Street
Jeffersonville, IN 47130

Questions regarding Ministry Partnership Fund set-up, administering your fund, accessing fund and donor information on the Presbyterian Mission Exchange, or inserting the *Give Now* button on your website, please contact Mission Exchange Services at 800-858-6127 or email missionexchange@presbyterianfoundation.org.

Your Ministry Relations Officer can provide assistance in developing gifts from your members. To locate your Officer, go to PresbyterianFoundation.org, or call us at 800-858-6127.

Terms and Conditions

The Presbyterian Foundation will establish a fund(s) (collectively referred to herein as “the Fund”) that will make distributions only for the benefit of the Ministry Partner, and Foundation agrees that Ministry Partner’s Christian mission (the “Purposes”) are not contrary to the mission of the Presbyterian Church (U.S.A.) and are inclusive of and consistent with the Purposes for which the Fund is established. Distributions from the Fund to the Ministry Partner must be used for the Purposes. This agreement is subject to the following terms and conditions.

Contribution of Assets to the Fund and Use. Ministry Partner acknowledges and agrees that all contributions made to the Foundation are irrevocable charitable contributions to the Foundation legally restricted for the benefit of the Ministry Partner, in accordance with the Purposes established by the Partner.

Contributions from Third Parties. Parties other than Ministry Partner may from time to time, give, devise, assign or convey to the Foundation, subject to this Agreement, assets acceptable to the Foundation, and the Foundation shall hold, manage, invest, reinvest, administer and distribute all such assets as part of the Fund. The Foundation shall not be obligated to accept any particular gifts from Ministry Partner or any third party of the Fund.

Distributions of Fund Assets. Foundation may distribute Fund assets only for the benefit of Ministry Partner, provided that at the time of the distribution Ministry Partner’s mission is not contrary to the Presbyterian Church (U.S.A.)’s and is recognized and qualified as a tax-exempt organization under Sections 501(c)(3) and 509(a) (1) and 170 (b) (1) (A) (i) of the Code, contributions to which are tax deductible under Section 170 of the Code. In the event Ministry Partner ceases to be so recognized or to so qualify, Foundation may distribute Fund assets to another entity in its discretion in alignment with the Fund’s established Purposes.

Governing Law and Jurisdiction. This Agreement and all rights and obligations hereunder, including matters of construction, validity and performance, are governed by the laws of the State of Indiana without regard to the principles of conflicts of laws. Notwithstanding, to the extent that the laws of the United States of America applicable to the formation and operation of tax exempt organizations are required to be applied, such laws also apply and govern. Regardless of the place of execution, this Agreement shall be deemed to be a contract made in Clark County, Indiana.

Severability. If any provision of this Agreement or the application thereof to any party or circumstances is invalid or unenforceable to any extent, the remainder of this Agreement and the application of such provision to any other party or circumstance is not affected thereby and is to be enforced to the greatest extent permitted by law.

Trademark. The Foundation and Ministry Partner agree that the use of the other’s trademark in all marketing materials and messaging campaigns will be done with the express written approval of the other entity.

Amendment or Termination of Agreement. Any amendment or termination of this Agreement, or the Fund which is the subject of this Agreement, must first be agreed to by Ministry Partner and Foundation. Foundation may amend these Terms and Conditions by providing 60 days notice.

Authority. The signatories of this Agreement warrant and represent that they have the authority to enter into this agreement and bind their respective entity.



Setting up your Ministry Partnership Fund

Please refer to the Ministry Partnership Guide for details regarding your fund with the Presbyterian Foundation. The following information will assist in establishing your fund.

1. Organization Information

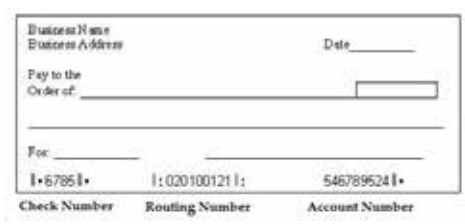
| | | | |
|-------------------|---|----------------|-----|
| Organization Name | | Federal Tax ID | |
| Preferred Address | City | State | Zip |
| Telephone | Fax | | |
| Web Address | Email Address (for general organization correspondence) | | |

Our organization is... Presbyterian Presbyterian-Related (Please provide documentation.)

Bank Information (for account to which funds will be deposited upon withdrawal). Please also include a voided check for this account for verification.

Routing Number:

Account Number:



Organization Mission Statement: _____

2. Ministry Partnership Fund Information

The fund name is unique for your ministry. Please write the name and purpose as you wish it to be displayed online. You may establish multiple funds to address various projects. Please include further funds on another sheet.

Fund Name: _____

Fund Purpose: _____

Fund Name: _____

Fund Purpose: _____

3. Fund Administrators

Please assign responsibility to the appropriate individuals for the fund management activities listed below. Please include further administrators on another sheet. Please note: all fund access is online.

- Access donor and gift information
- Access fund summary information (including fund balances and withdrawal history)
- Receive donation notification emails
- Request withdrawals
- Request administrative changes (add/change/remove administrators and funds)

Administrator Name (please print)

Position

Email address (required)

Telephone

Is this individual an employee of the organization? Yes No

Administrator Name (please print)

Position

Email address (required)

Telephone

Is this individual an employee of the organization? Yes No

4. Authorization

I certify that each of the people listed above is authorized to access the information and activities stated in the Fund Administrator Section checked above. I further certify that we have read and agree to the Ministry Partnership Program, including the Terms and Conditions, as set forth in this Guidebook.

Authorized Signer Name (please print)

Position

Email address (required)

Telephone

Are you an employee of the organization? Yes No

Grant the authorizer fund access?: Yes No

Authorized Signature

Date

Please submit your completed application, a voided check, and documentation of Presbyterian relatedness to the Presbyterian Foundation. Contact information listed below. Please note, Fund Administrators and Authorized signer will receive a Welcome email with information regarding fund administration upon the establishment of your funds.

Mail: 200 East Twelfth Street
Jeffersonville, IN 47130

Fax: (502) 805-0466
Email: misionexchange@presbyterianfoundation.org