HIPGive.org is the first and only crowdfunding platform focused on promoting generosity towards Latinx social impact projects in the US and across the Americas.

In this guide you will learn how to use the platform to publish a project and manage your crowdfunding campaign.

The focus is solely on the technical characteristics of the platform. If you would like more guidance on the strategies that you should use to run a successful crowdfunding campaign, please take part in our trainings. You can contact us for further guidance at hipgive@hiponline.org
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1. Log in or sign up
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1.1 Select “Log in or sign up”

The first step in using HIPGive is to create an account.

- From the homepage, select “Log in or Sign up”

- If you already have an account, enter your email and password to access the platform.

- If this is the first time you’re using HIPGive, select “Register” at the end of the section to create a new account.
1.2 Fill in the registration form

If it’s the first time you’re using HIPGive, fill in the registration form with your name, surname, email and telephone number.

Choose and enter a password.

Keep a copy of your password! You’ll need it each time you want to use HIPGive.

Then, add your organization’s name, legal name and country.

Finally, upload proof of your nonprofit status, either a letter from the IRS confirming 501c3 status (US), or your articles of incorporation or “acta constitutiva” (Latin America).

When you register for HIPGive, you accept the terms and conditions registrarte estás aceptando las condiciones de uso (términos de uso) de HIPGive. Puedes consultarlas aquí.
2. Create and publish a project
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2.1 Create a new project

You can create a new project from your “dashboard”.

- Find the Projects section on the menu to the left and select List.
- Click the red button which says “New project” on the right of the screen.
- Complete the project creation form indicating the name of the project, the goal and the currency. (Don’t worry, you can still change this later.)
2.2 Fill in the general information

It’s time to add the content that will be published as part of your project.

- Within your project, select the “General information” tab from the options at the top.

To edit the content, click on the “pencil” icon at the top of the page. Remember to save any changes you make.

To view the project as visitors to HIPGive will view it, click on the eye icon at the top of the page.

If your project forms part of a special campaign, select it from this dropdown list.
2.3 Add content in English and Spanish

You can add content in English, Spanish or in both languages.

**Title**: This is a short phrase which encapsulates the essence of your project. Together with the video it will be the most visible part of your project.

**Short description**: A phrase that complements the title, maximum 255 characters.

**Description**: This is the space to describe your project in narrative text. We recommend 400 - 600 words, separated into short, easy-to-read paragraphs.

**Thank you message**: These phrases will be inserted into the automatic thank you email that is sent to each person who contributes to your project.

**Social media thank you message**: This phrase will appear when people choose to share the project on their social media.
2.4 Add banners (videos and images)

To add a video or image, select the Banners tab and then the “plus” icon.

**Images**: The ideal size for images is 670 x 492 píxeles and they should be less than 1MB. Add a short description so that people can relate what they’re seeing to the project you want to fund.

**Video**: We recommend short videos, between 1 - 3 minutes. You don’t have to upload it directly to HIPGive, but rather should upload it first to YouTube or Vimeo and then paste in the link.
2.5 Add perks (optional)

Perks enable you to set predetermined donation amounts and link them to a tangible reward (a product or service) or a digital thank you (e.g., a personalized video).

To add a perk, select "Add perk" and fill out the form in the pop-up window.

- If you add an image, the recommended size is 378 x 200 pixels.
- The amount indicates the amount of money that a person should give in order to receive the perk.
- "Stock" allows you to establish a maximum amount of people that can receive the perk.
2.6 Add other members of your team

The person named as the project owner will receive all notifications pertaining to the project by email.

If you want more people to be able to edit the project:

- Go to the "Organization" section and then "Members" in the menu on the left.
- A list of people who currently have permission to edit your organization's projects will appear. You can edit their information by selecting the pencil icon to the right of each name.
- To add a new person to your team, select the red button "Create user" and fill in the form.
2.7 Upload your documents

To publish your project on HIPGive you must confirm your status as a nonprofit organization.

- Go to “Organization” in the menu on the left and select “Information”
- Select the tab called “Files”
- Click on the pencil icon (to edit), select the “plus” icon and follow the instructions to upload your “Letter of Determination” confirming your status as 501c3 in the USA, or your articles of incorporation (acta constitutiva) if you’re based in Latin America.
- If you have marked that you are authorized to receive tax deductible receipts in Mexico, please also upload the letter from SAT that confirms this status.

Remember you must upload all of the relevant documents before your crowdfunding campaign finishes so that we can transfer the funds you raise. However, it is not essential to upload them before your campaign begins.
2.8 Send your project

When you have added all your content and previewed your project (using the “eye” icon), you can send us your project for review and publication.

Select the gear icon at the top right and then the option "Request Validation".

Your project status will be changed from Draft to Review and you will not be able to modify it at this time.

Our team will review your project. Within a period of 2 to 3 business days we will schedule its publication and you will receive an email containing the link (URL) of your project.

If we believe that something is missing, or if we have any suggestions to strengthen your project, we will send you an email and you will have the opportunity to continue editing your project before publication.
3. Update your organization’s profile
3.1 Modify your organization’s information

To modify the information regarding your organization:

- Go to the “Organization” section on the menu on the left.
- Select the option of “Information”

Select the “pencil” icon from the top to edit the texts.

Don’t forget to Save before moving on.
3.2 Update your address

If you need to change your address:

- Check that you’re in the “Organization” and then “information” section of the main menu on the left.
- Select the tab “List address”.
- Select the pencil icon to the right of the address that you want to edit.
- Remember to click on “Save” when you’ve finished.
3.3 Mark your tax deductible status

If you are an authorized tax exempt organization in Mexico and you want to appear as such on HIPGive:

- Go to the “Organization” section of the main menu on the left and select “Information”
- Select the tab marked “Legal Information” and tick the box marked “Authorized Donor”.
- Select the tab “Files”. You’ll see that a box appears marked “Certificate of Fiscal Authorization from the SAT”.
- Select the pencil icon (above) and then the plus sign in the box, to enable you to upload the document.

By certificate, we mean the letter that SAT has sent you confirming your status as an authorized tax exempt organization (donataria autorizada) in Mexico.
3.4 Add information regarding your fiscal sponsor

Most organizations that use HIPGive do so directly, but if your organization is not legally incorporated or doesn’t have a bank account in its own name, you can also participate via a fiscal sponsor.

- Check that you’re in the “Organization” section of the main menu on the left and select “Information.”

- Select the “General information” tab and fill in the information relating to YOUR organization.

- Select the “Legal information” tab and fill in the information relating to your fiscal sponsor’s organization.

- Remember that the documents that you upload to the “Files” tab must relate to your fiscal sponsor.
3.5 Upload the letter from your fiscal sponsor

Your fiscal sponsor should provide you with a letter to prove their commitment to working with you.

In the letter, the legal representative of the fiscal sponsor should:
- Confirm their support of your project.
- Indicate that they fulfil the requirement of being a legally established nonprofit organization.
- Confirm they will receive the funds on your behalf.
- State that they will oversee the project’s development and the correct use of the funds.

The letter should be signed, then scanned and the scanned copy uploaded to the File section.
4. Give to a project
4. Give to a project

Even though you are not the target audience for your campaign, it’s important that you know how the donation process works. This will help you provide guidance to other people who want to give.

4.1 Choose “Give to this project”

To contribute to a project:

- Choose the project that you want to fund from the HIPGive page, or use the direct link to go straight to your project’s page.

- Select the red button “Give to this project”.
4.2 Decide how much to give

- Choose the currency of your contribution.
- Select the amount. You can choose from the suggested amounts or write in your own amount in the box.
- The platform will make a TipHIP, a voluntary contribution in addition to your donation. You can edit this amount.
- Select the “Proceed to donation” button.
TipHIP

After entering the amount you want to give, the platform will suggest an amount to “TipHIP”.

TipHIP is a voluntary tip that people can contribute towards sustaining the platform. As a nonprofit organization, HIPGive relies on these small voluntary contributions in order to avoid charging additional fees for our services.

If the person does not want to leave a tip or prefers to change the amount, they can do so freely.
4.3 Share your details and choose your receipt

You will see a summary of your contribution and be asked to share your details:

- In addition to name, email and telephone number, you can leave a message which will be published on the project page.

- If you don’t want the message to be published, select “Make my contribution anonymous”. The organization will be able to see your name, message and contact details but no-one else will.

- If you wish to receive a tax-deductible receipt, tick the box “Do you need a tax-exempt receipt?”.
Receipts on HIPGive

If you wish to receive a tax deductible receipt you can choose between a US receipt or a Mexican (MEX) receipt.

If you choose a valid tax deductible receipt in Mexico, you must include your fiscal information at this time.
4.4 Confirm your payment method

You can choose to make your contribution via PayPal or with a credit or debit card.

- If you choose PayPal, please fill your details in the pop up window.
- If you choose to pay with a credit or debit card, fill in your details directly in the form.
4.5 Confirm your payment method with a tax deductible receipt

If the organization you give to is an authorized tax exempt organization in Mexico and you have selected to receive a tax deductible receipt, you can choose from the following payment methods:

- PayPal
- In-store donation at local convenience stores
- Bank transfer (SPEI)
- Credit or debit card
4.6 Confirmation emails

After contributing to a project on HIPGive you will receive the following emails to the email address which you provided:

- An email confirming that the transaction is being processed.
- A thank you email.

If you chose to receive a tax deductible receipt in the US:

- The thank you email includes text that makes it valid as a fiscal receipt.

If you chose to receive a tax deductible receipt in Mexico (and entered your details at that time):

- Your receipt (CFDI) will arrive separately, in addition to the previous emails.
The donation process

If you want to communicate how easy, quick and safe it is to donate online with HIPGive, you can share this infographic. You can download it [here](#).
5. Administrate your campaign
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5.1 Download your transactions

You can consult the list of people who have given to your project at any time.

- Select “Transactions” from the menu on the left.

- Select the yellow button “Filter” to organize the transactions by date, payment method or to look for a specific person.

- Select the red button “Download”.

You may see some transactions marked as “declined.” This isn’t to do with the platform, more often than not it is because people do not enter their details correctly or the bank has put a block on the use of the card. We suggest that the person try again or with another payment method.
You may see some transactions marked as "declined." This isn't to do with the platform, you can see the cause in the Error Message column.
5.2 Upload your documents

To send you the funds you’ve raised we need several additional documents. You should upload these documents to the platform before your campaign is over. If we don’t have them, we won’t be able to transfer the funds to you.

- In the “Organization” section of the main menu, select “Information”.
- Go to the “Files” tab.
- Select the pencil icon to edit and the plus icon on each box where you should upload the document.
- Save the information before you move on.
5.3 Review your bank information

For organizations based in Latin America, payment is made by international bank transfer.

In order for us to transfer the funds to your account, you must fill in the bank details:

- In the "Organization" section in the menu on the left, select "Information."
- Navigate to the "Bank Information" tab.
- Enter the requested information.

The name of the account holder must match the legal name of the organization.
5.4 Transferring your funds

- Funds are paid through a check sent to your address (United States) or a bank transfer (United States and Latin America).
- The process takes 4-6 weeks; this includes the review of your documents and time for the processing of all transactions, including any chargebacks or pending transactions that have arisen.
- When we’re able to make the payment, we will send an email confirming the amount of funds raised, any additional funds, the commission retained for payment processing and the final amount you will receive.
- You must send Hispanics in Philanthropy a valid fiscal receipt for the funds received or, in the case of some Latin American organizations, a letter confirming receipt of the funds.

SERVICES AND FEES

Unlike many other crowdfunding platforms out there, HIPGive allows fundraisers to create and publish projects on HIPGive free of charge. As of December 2016 we got rid of our administrative fee, which means more of the funds go towards your project. The only fee that will be deducted from the total raised on the platform is a payment processor fee through an external provider.

Currently, the payment processor fee is determined by the payment processor. This is a flat rate and is not affected by whether or not you reach your project goal.

To avoid passing on any further costs and ensure organizations keep more of the funds they raise, we recently introduced the TIPHIP feature. When making a gift, donors are invited to contribute a small additional donation to cover HIPGive’s operational expenses. This is entirely voluntary and well received by most donors.

This table illustrates how we calculate the total amount of funds transferred at the end of a project:

Consult current commissions
5. FAQs

¿Quién puede usar HIPGive para coordinar una campaña de crowdfunding?

HIPGive es un recurso para proyectos de organizaciones sin fines de lucro basadas en los Estados Unidos o América Latina. Como nosotros también somos una organización sin fines de lucro, estamos obligados a pedir a las organizaciones participantes que comprueben que son una organización legalmente establecida y que la mayoría de las personas que se beneficiarán del proyecto son latinas.

Durante el proceso de enviar tu proyecto, se te pedirá que adjuntes un documento de verificación de tu estatus sin fines de lucro, normalmente la carta de confirmación 501(c)(3) o si eres una organización de América Latina, tu acta constitutiva.

Una vez que tu campaña esté activa, solicitaremos:

- Lista de integrantes del Consejo Directivo
- Estado financiero más reciente (o Formato 990 del IRS para organizaciones en Estados Unidos)
- Presupuesto anual
- Datos para realizar la transferencia bancaria a tu cuenta

En el caso que no tengas estos documentos, puedes presentar un proyecto a través de un patrocinador fiscal, una organización que puede avalar tu proyecto y proveer los documentos requeridos. Recibirán directamente los fondos recaudados de parte de HIPGive y deberán asegurar que los fondos se apliquen al proyecto publicado.

¿HIPGive es un sitio seguro?

Sí, HIPGive es un sitio seguro. El procesador de tarjetas de crédito utilizado por la plataforma, es un Proveedor de Servicios Certificado Nivel 1 PCI (el nivel más alto), que requiere una auditoría de seguridad independiente anual de procesos y sistemas. El sistema se prueba diariamente (manualmente y automáticamente) para garantizar la seguridad.
¿Las personas obtienen un recibo por su aportación?
¡Sí! Inmediatamente después de completar su donación, enviamos una confirmación de transacción a la dirección de correo electrónico. Ésta incluirá el logotipo de nuestro procesador de pagos. Poco después, también enviaremos un agradecimiento a la misma dirección de correo electrónico; si la persona lo eligió. Este email aplicará como recibo deducible de impuestos en EEUU. (Hispanics in Philanthropy es una organización sin fines de lucro 501(c)(3) ). Si la persona eligió donar a una organización donataria en México, recibirá un tercer correo con su CFDI.

¿Qué métodos de pago se aceptan?
HIPGive acepta pagos por medio de tarjetas de crédito y débito, así como PayPal. Si tu organización es donataria autorizada en México, pueden aportar también mediante transferencias SPEI y en tiendas de conveniencia.

¿Cuánto cuesta usar HIPGive?
Subir tu proyecto es gratuito. Una vez que generas ingresos, se aplica una comisión por transacción de aproximadamente 3.5%. La comisión varía según el método de pago, puedes consultar la lista completa aquí.

¿Qué es TipHIP?
HIPGive es parte de una organización sin fines de lucro, nuestra meta es prestar servicios de alta calidad al menor costo posible para las organizaciones sin fines de lucro que usan la plataforma. TipHIP es una opción para los donantes de hacer una pequeña donación adicional, por encima de lo que donen al proyecto, que nos ayuda a cubrir nuestros costos operativos y nos permite no cobrarle honorarios adicionales a las organizaciones sin fines de lucro que usan HIPGive.