HIP GIVE
by HISPANICS IN PHILANTHROPY

How to Create your Recurring Giving Page

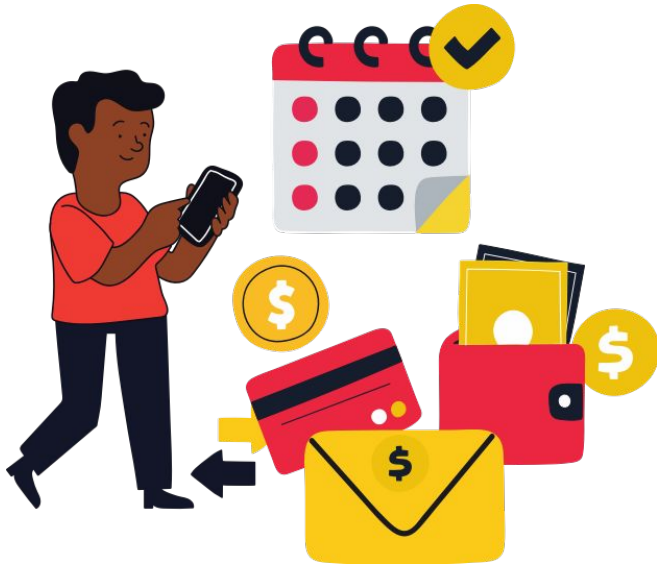
Recurring Giving Campaigns

HIPGive HIPGive is Hispanics in Philanthropy's digital platform that makes it possible to mobilize resources for social impact projects throughout the Americas.

Through our suite of innovative tools including crowdfunding campaigns, permanent digital campaigns, peer to peer giving and digital giving circles, people and organizations come together to create community and make an impact in our world.

In this guide you will learn how to use the platform to publish your organization's page and receive monthly, quarterly, semiannual or unique donations.

The guide is focused only on the technical features of the platform. If you would like further guidance on the strategies you should employ for your recurring giving campaign, please participate in our training sessions or contact us at hipgive@hipfunds.org



Why should you use HIPGive for your recurring giving campaign?

- Low cost (5% + commissions retained for payment processing)
- Monthly funds transfer
- Secure transactions
- Access to your HIPGivers' contact details
- 100% bilingual Spanish - English
- Tax deductible receipt for the US and Mexico
- Community and technical support from HIPGive staff

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   - 1.2 Fill in the registration form
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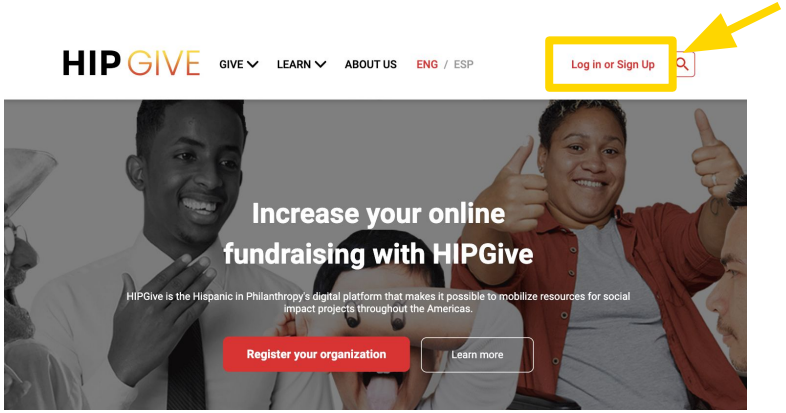
1. Log in or sign up

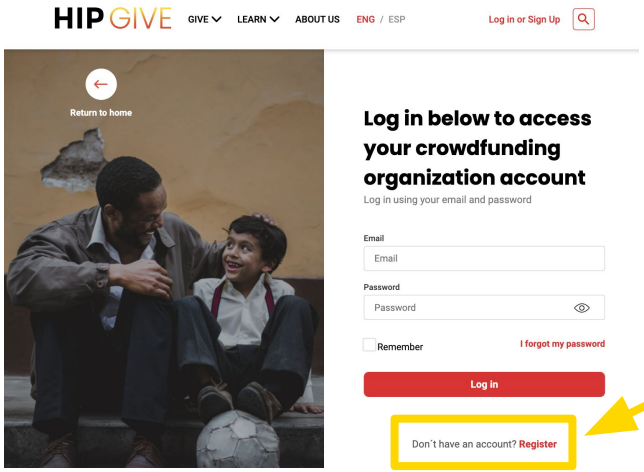
1. Log in or sign up

1.1 Click “Log in or Sign Up”

The first step to use HIPGive.org is to create an account.

- From the homepage, click on “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.



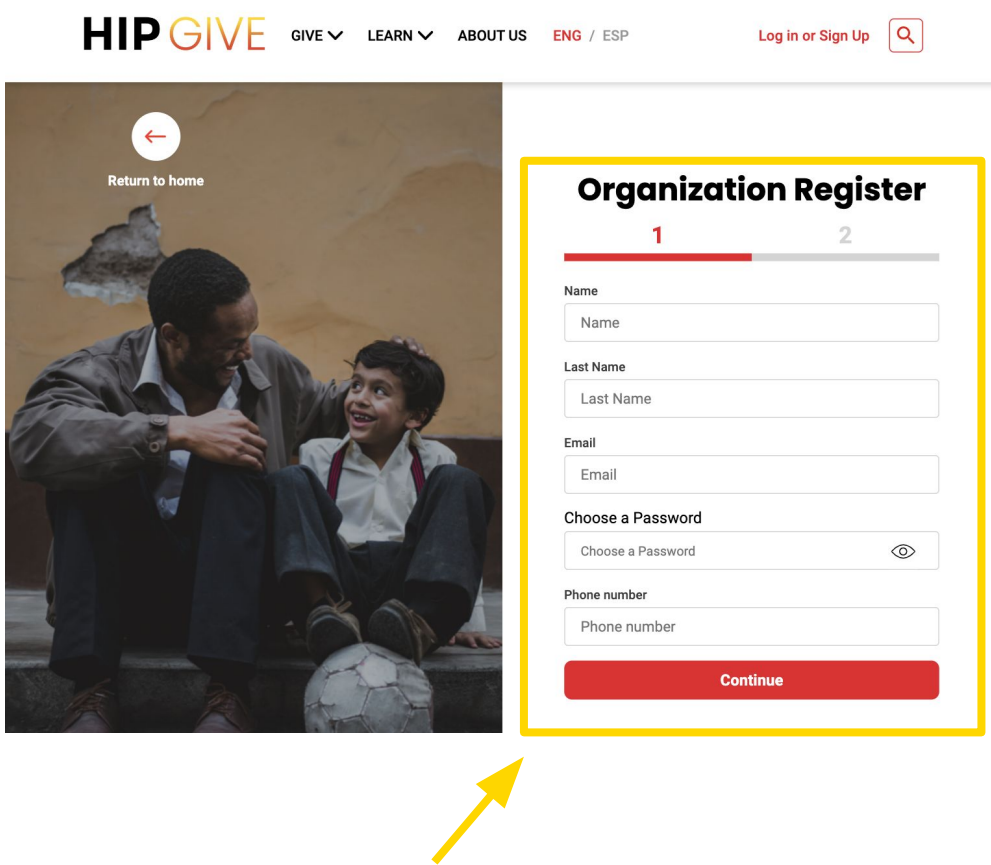


1.2 Fill in the registration form

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.

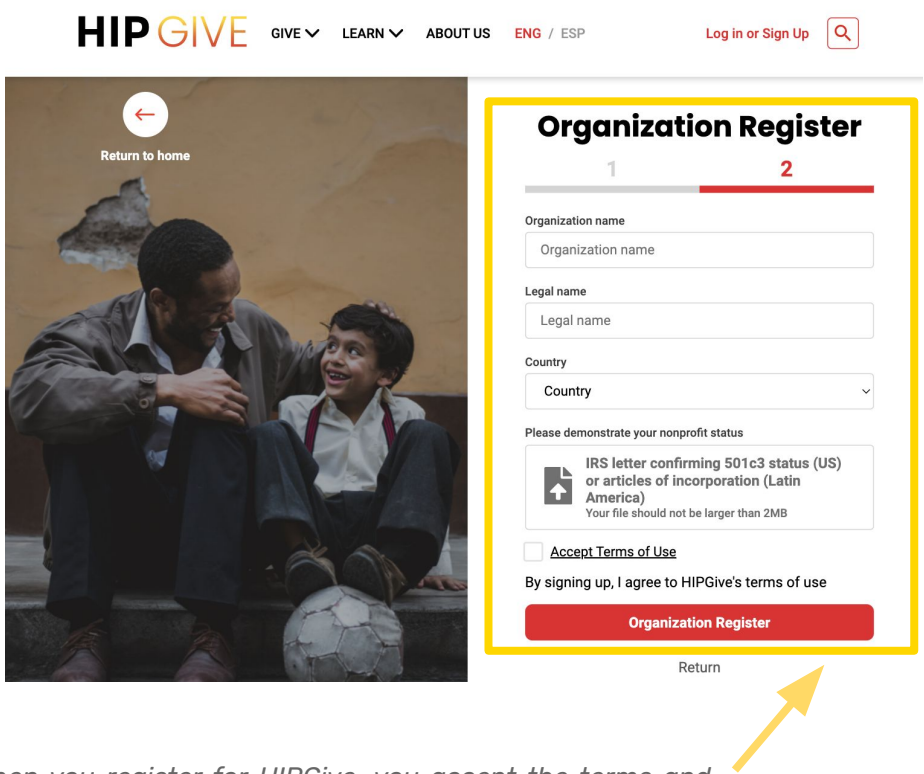
Keep a copy of your password! You'll need it each time you want to use HIPGive.



1.2 Fill in the registration form

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. You can read them here.

2. Update your organization’s profile

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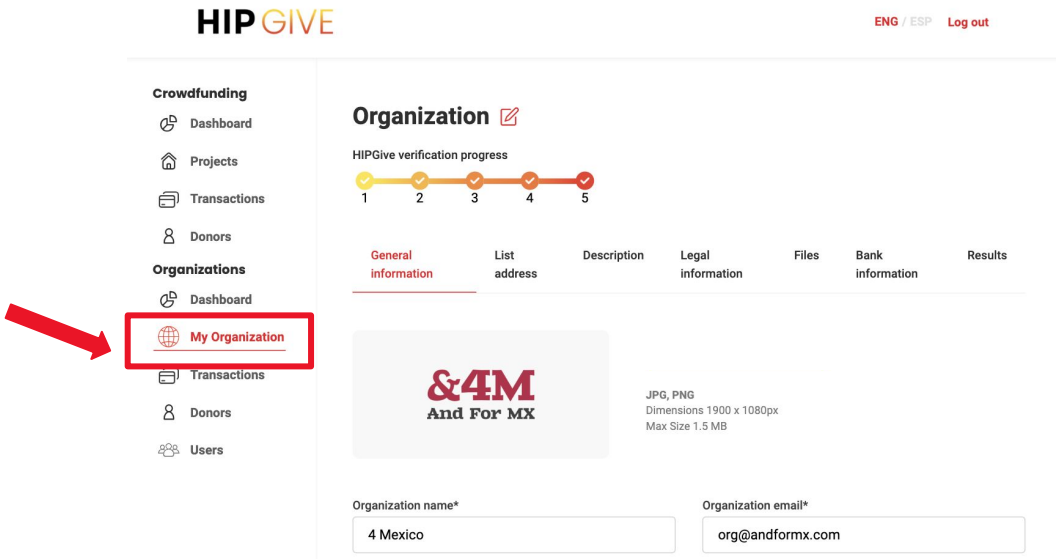
2.1 Edit your organization's information

- Find the Organizations section on the menu to the left
- Under Organizations click on "My Organization"

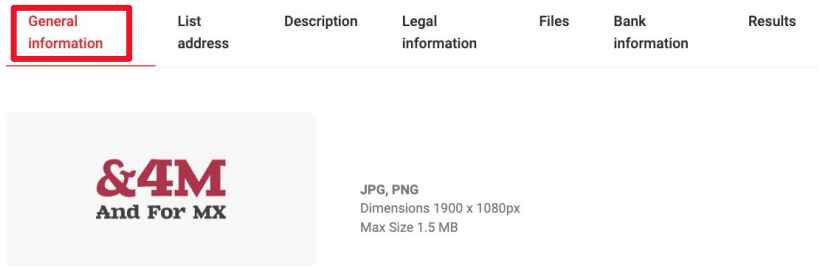


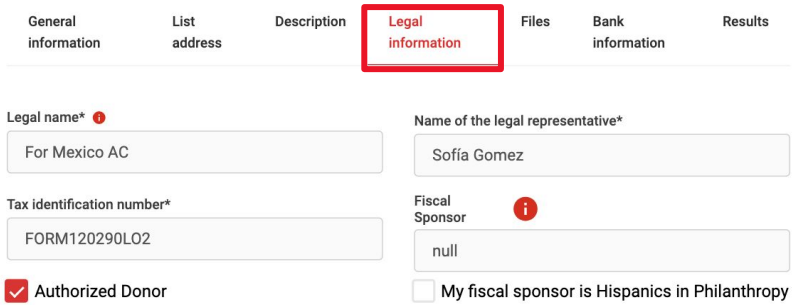
2.2 Fill in the tabs

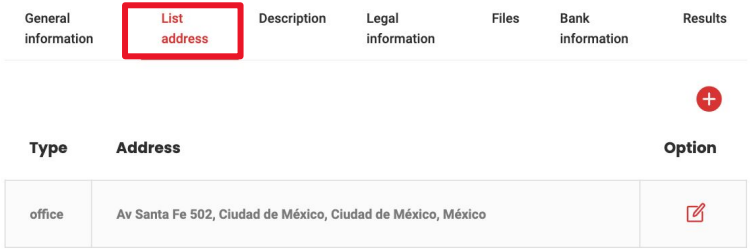
Go to each tab and fill in the information.

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

- General information
- List address
- Legal information





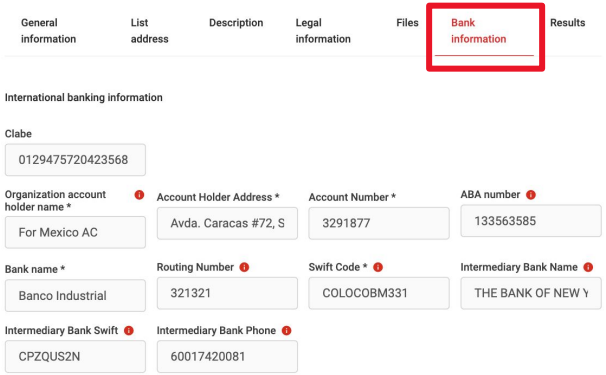


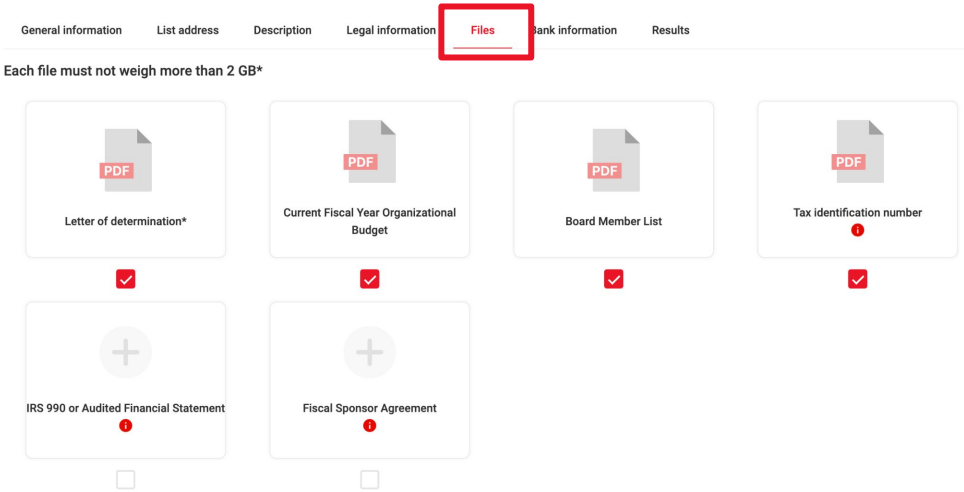
2.2 Fill in the tabs

Go to each tab and fill in the information.

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

- Files
- Bank information



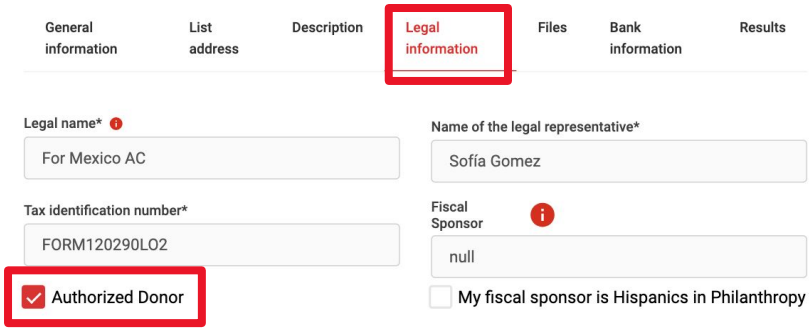


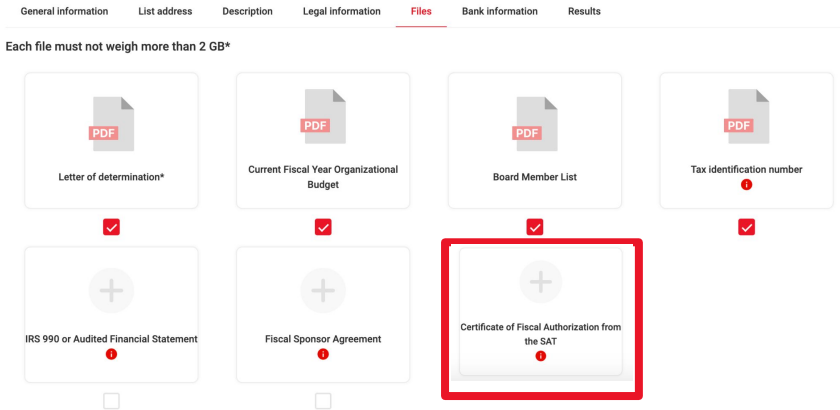
2.3 Mark your tax deductible status

If you are a “Donataria autorizada” (authorized tax exempt organization) in Mexico and you want to appear as such on HIPGive:

- Make sure you are in “My organization” section on the menu to the left.
- Select the tab “Legal Information” and tick the “Authorized Donor” box.
- 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 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. Activate your page

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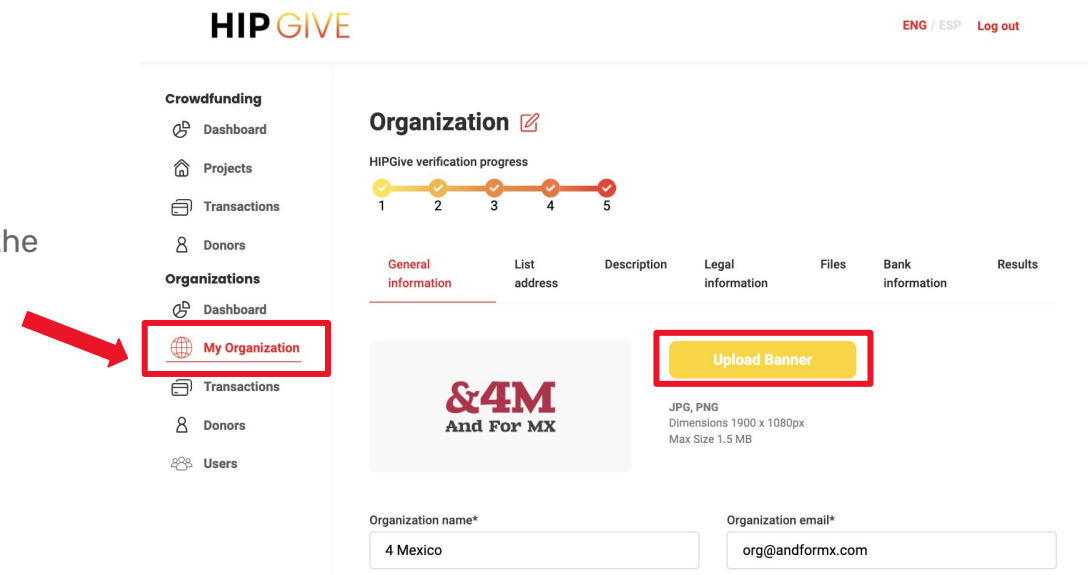
3.1 Add your logo

From the control panel, navigate to the menu on the left and check that you are in “My Organization”.

Switch to editing mode by clicking on the pencil icon.

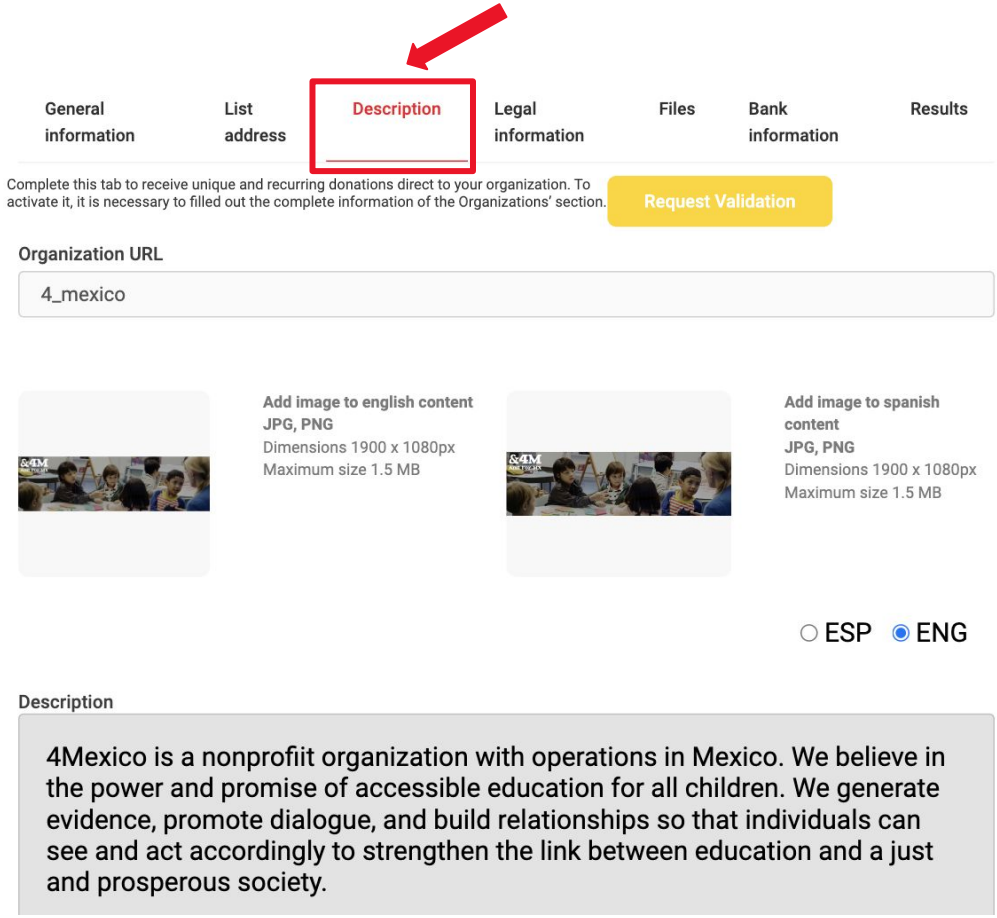
- Upload an image file with the logo of your organization. Click “Upload banner”.

  Logo specifications:
  Format: JPG or PNG
  Size in pixels: 1900 x 1080 px
  Maximum file size: 1.5 MB



3.2 Add the content you want to publish

The “Description” tab is where you add the content that you want potential HIPGivers (donors) to see.

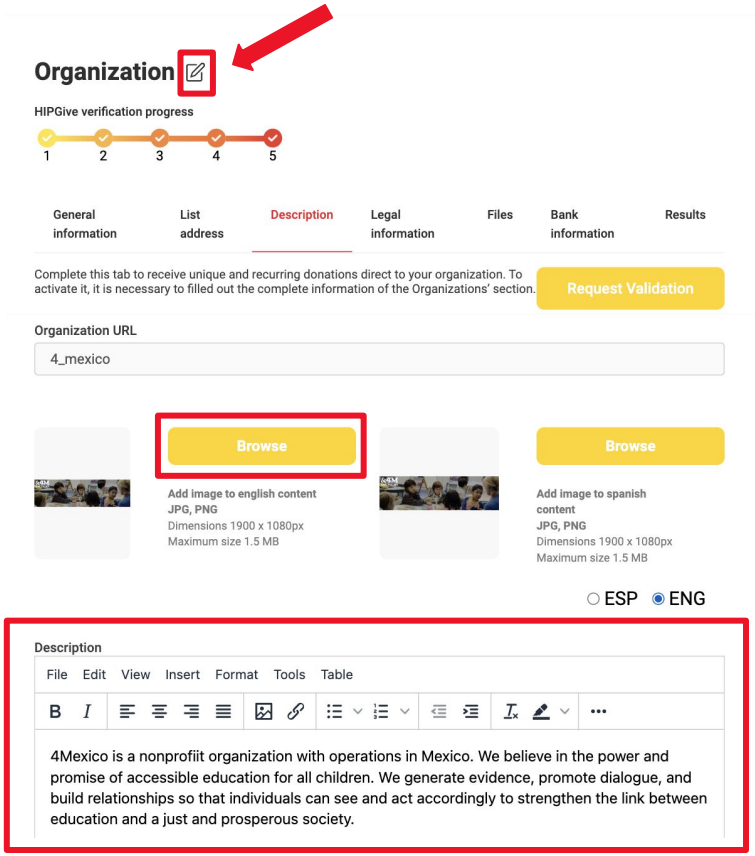


3.2 Add the content you want to publish

Switch to editing mode by clicking on the pencil icon.

- Upload an image that will become the principal image on your page.
  Specifications:
  Format: JPG or PNG
  Size in pixels: 1900x1080 px
  Maximum file size: 1.5 MB

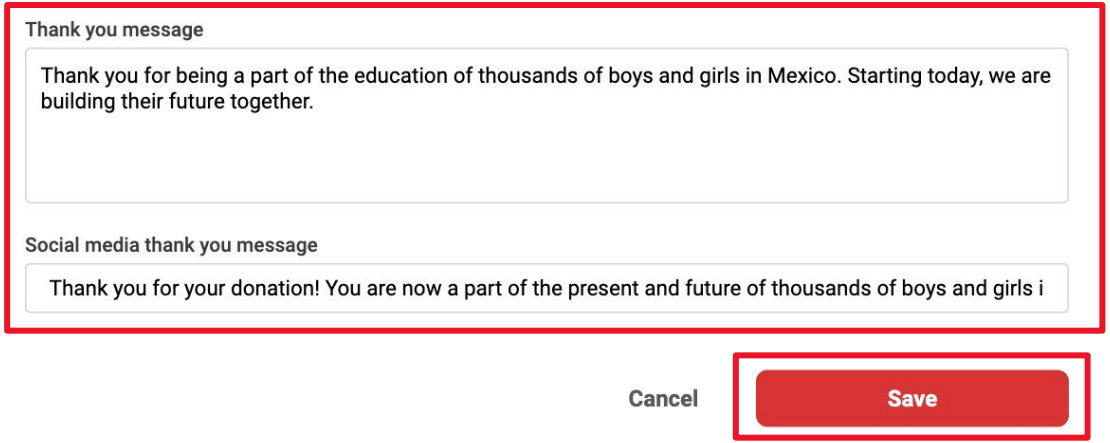
- Include a short text that encourages people to give to your work. We recommend including:
  - A belief statement, explaining why you do what you do.
  - A summary of the solution you offer and the value you generate for the people you serve.
  - A reason for people to get involved and an indication of what their donation can help you achieve, especially if given monthly.



3.2 Add the content you want to publish

- Add the message that you want HIPGivers to receive after every donation.

Don't forget to save before switching languages or tabs!

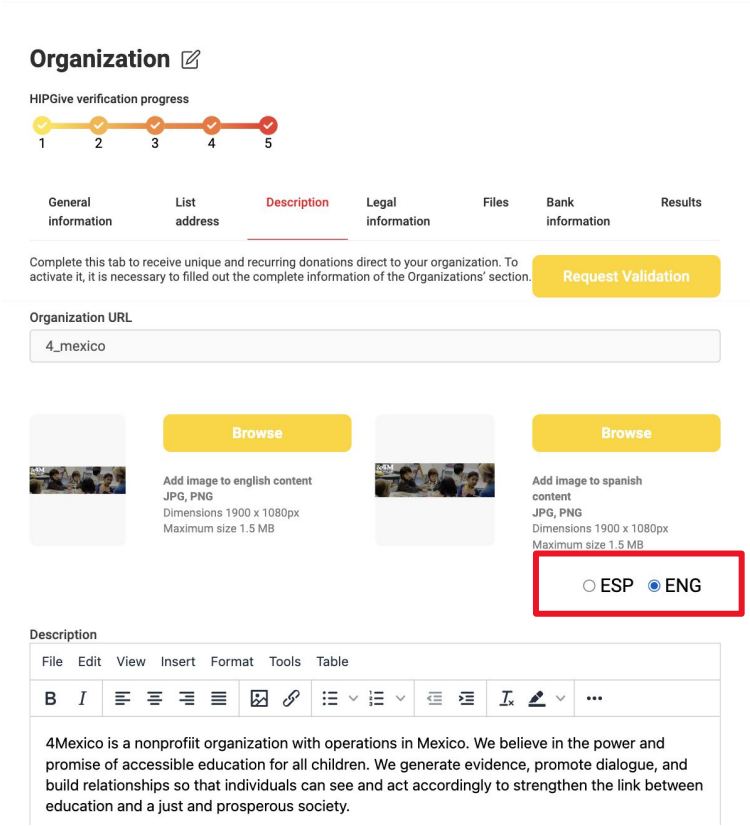


3.2 Add the content you want to publish

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

Remember to click on the pencil icon to be able to edit your content.

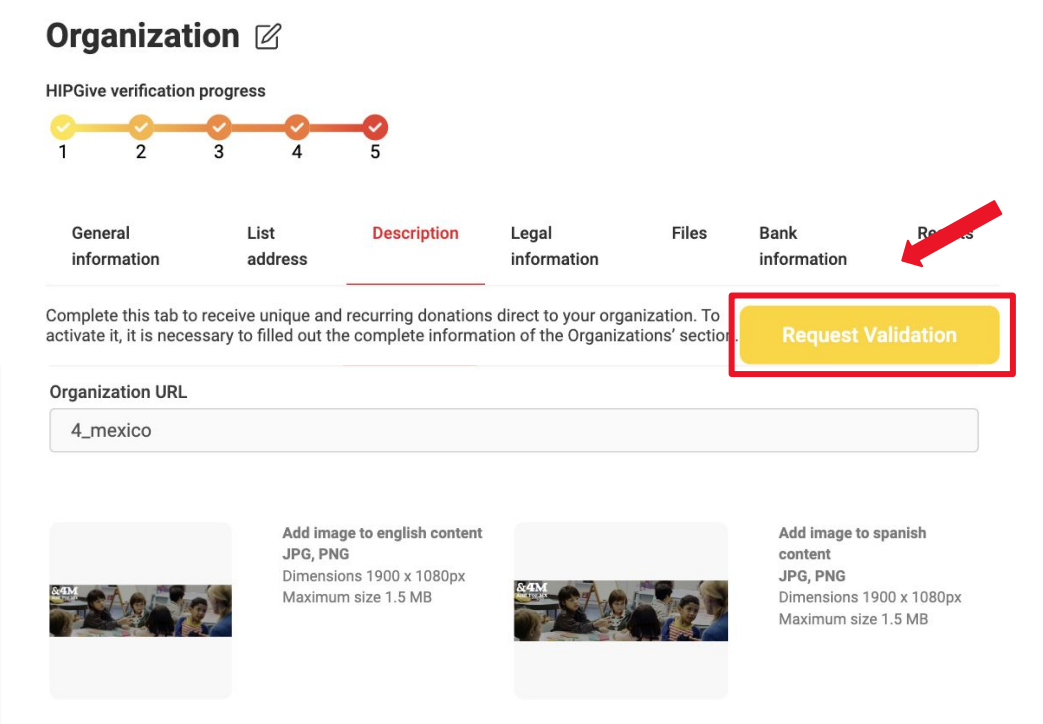
- To switch to the other language, toggle between the ESP (Spanish) and ENG (English) buttons on the right hand side.



3.3 Request validation

- When you've filled in all the tabs, click on the yellow button "Request Validation".

¡Ojo! All the tabs must be completed at this stage. If they are not, an error will appear.



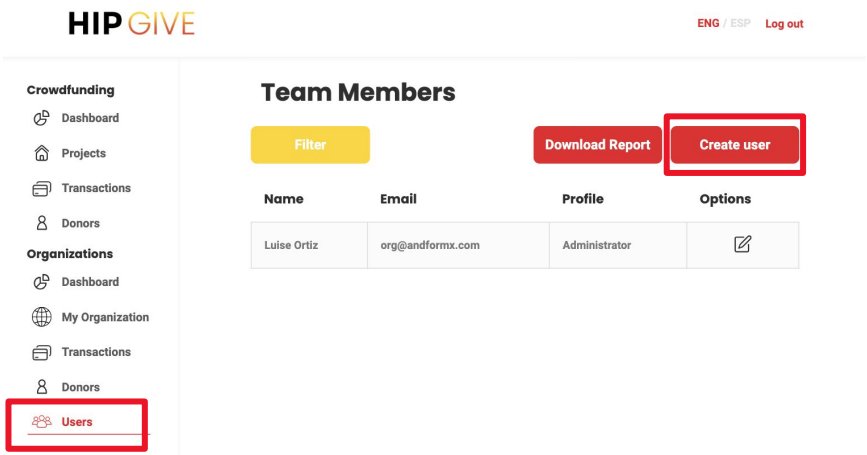
3.4 Allow colleagues to access your page

We'll send all official notifications regarding your organization's page to the email of the person named as the owner of your profile and to the email address registered in the the "General Information" tab. Notification emails can also be sent to your colleagues if you choose to give them access as Administrators within HIPGive.

If you wish to give your colleagues access to edit your page:

- From the menu on the left, choose "Organizations" and then "Users."

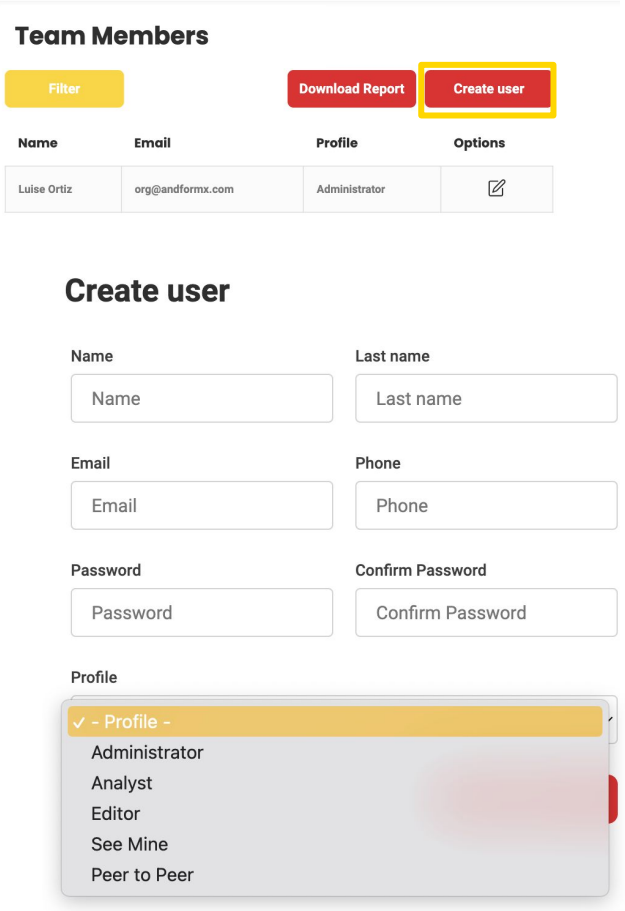
- You will see a list of individuals who currently have access to edit your organizations' information.
    - To edit their contact information, select the pencil icon and make the changes.
    - To add a new colleague to your HIPGive team, select "Create user".



3.4 Allow colleagues to access your page

To add a new colleague to your HIPGive team, select the red button “Create User”.

- Fill in the form. Don’t forget to keep the password in a safe place!
- If you wish your colleague to have access to your organization’s page, please select the Administrator from the drop down list.
- Click on “Add” when you’ve completed the form.



4. Preview your page

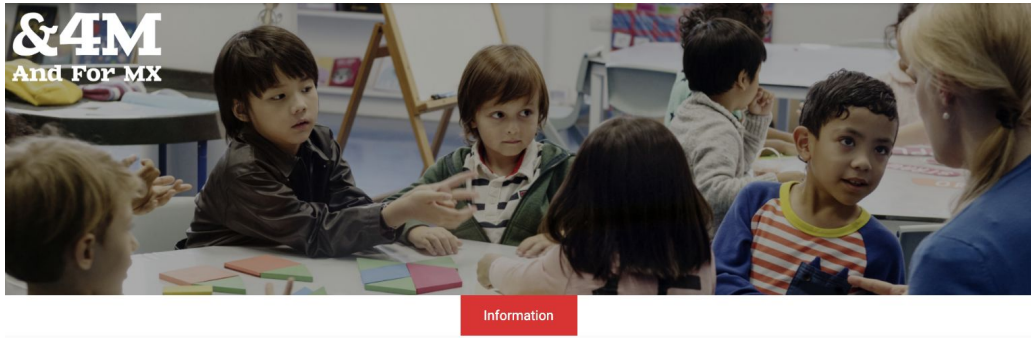
4. Preview your page

4.1 Direct link

When your organization's page has been published, you'll receive an email with your unique page link.

Click on the link to view your page as potential HIPGivers will see it.

You can always go back to your dashboard to the "Description" tab and edit the content.



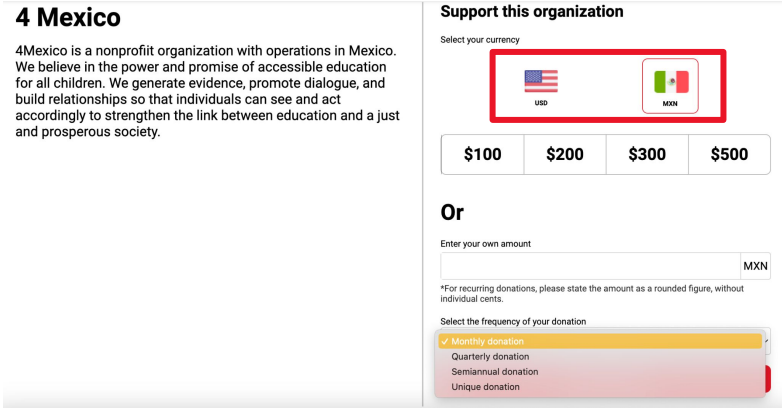
5. How to donate

5. How to donate

Even if you are not the target audience for your campaign, it is important for you to know how the process of donating to an organization on HIPGive works. This way, you can better guide your potential donors.

5.1 Choose the donation amount

- Select the currency in which you'd like to make your contribution.
- Enter the amount. You can choose from the four suggested amounts or enter your own.
- Decide how often you want to donate: monthly, quarterly, semiannual, or unique donation.
- Click the "Proceed to donation" button.

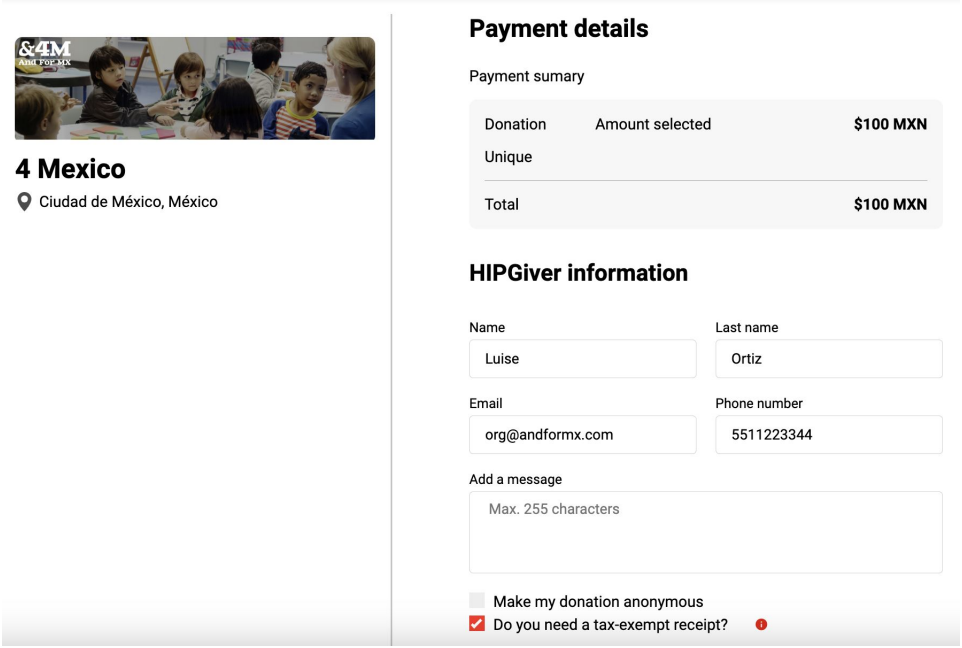


Currently, you can choose the amount you want to donate in US dollars (USD) or Mexican pesos (MXN), but donations can be made from any country in the world.

5.2 Share your details and choose your receipt

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

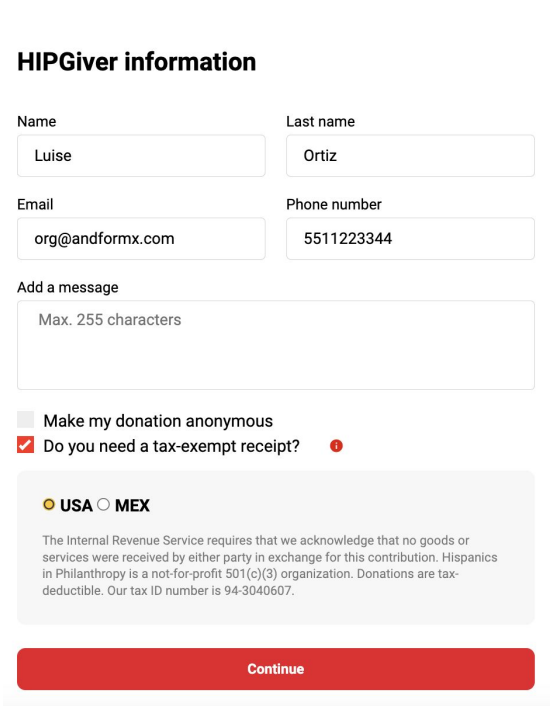
- In addition to name, email and telephone number, you can leave a message to the organization.
- If you don't want the message to be published, select " Make my contribution anonymous" The organization will be able to see your name, message and contact details but no-one else will.
- If you wish to receive a tax-deductible receipt, tick the box "Do you need a tax-exempt receipt?".

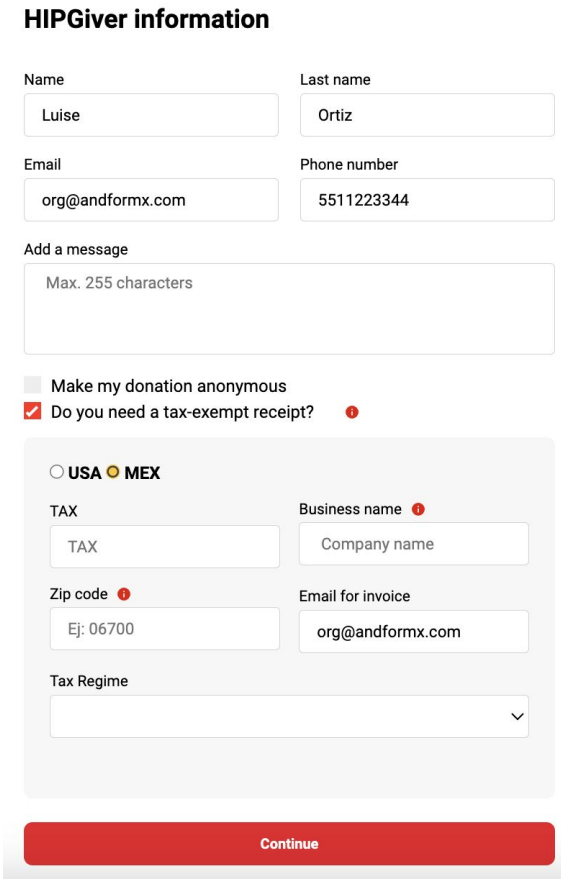


Receipts on HIPGive

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.





5.3 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 Mexico

Ciudad de México, México

Payment details

Payment sumary

Donation	Amount selected	$100 MXN
Recurrent	Monthly	
Total		$100 MXN

Select your payment method

Pay with PayPal

Or

Card Number MM / YY CVV

Cardholder name

Card Holder

I'm not a robot reCAPTCHA Privacy - Terms

Pay $100 MXN

By clicking on pay, you accept our Terms and conditions of use

5.3 Confirm your payment method

If you are making a unique donation to an organization with the status “donataria autorizada” (authorized tax-exempt organization) in Mexico, you will have the option to pay using these two additional methods:

- In-store donation at local convenience stores. Click the option and download the file where you will see a code that you must present at the counter to make the payment.
- Through SPEI (bank transfer in Mexico). Click the option and download the file where you will find the CLABE number to which you should transfer the funds.

4 Mexico

Ciudad de México, México

Payment details

Payment sumary

Donation Unique	Amount selected	**$100 MXN**
Total		**$100 MXN**

Select your payment method

PayPal Checkout

OXXO 7-Eleven Walmart and more

SPEI

5.4 Confirmation emails

After making a contribution on HIPGive, you will receive an email confirming the transaction to the email you provided at the time of donation.

- If your donation is recurring, you can check the donated amount, recurrence, and when the next charge will occur.
- If you made a one-time donation, only the donated amount will appear.

If you chose to receive a U.S. tax-exempt receipt:

- The confirmation email includes a statement that validates it 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 confirmation email.

HIP GIVE

Hello Luisa!

We would like to thank you for your contribution of of **$ 100 MXN** in support of **'4 Mexico'** Your next donation will be charged on 01/05/2023

Here is a personal note from 4 Mexico:

Thank you for being a part of the education of thousands of boys and girls in Mexico. Starting today, we are building their future together.

This charge will appear on your statement as "HIP/HIPGive"

If you have a question you can contact us at hipgive@hipfunds.org

Thank you again for your generous support!

The HIPGive Team

The thank you message you wrote in the "Description" tab will appear here.

Infographic: How to donate

If you want to communicate how easy, quick and safe it is to make a recurring donation to your organization through HIPGive, you can share this infographic. You can download it here.

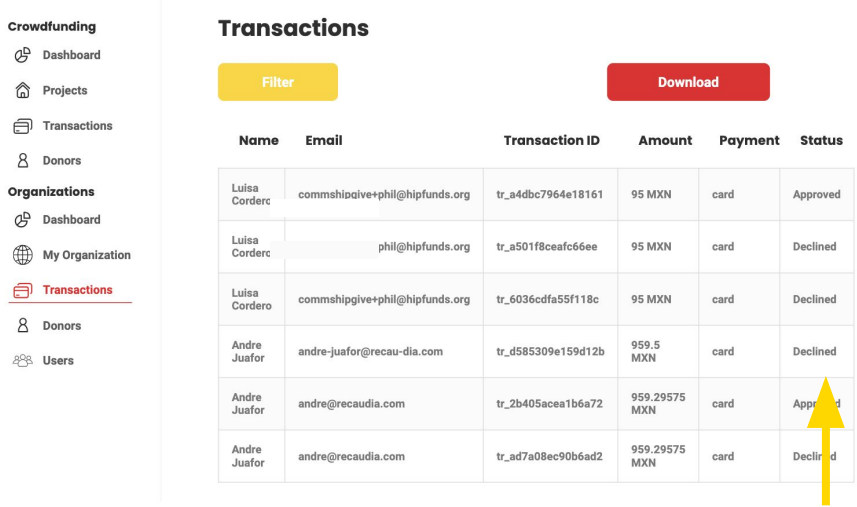
6. Manage your campaign

6. Manage your campaign

6.1 Check the transactions

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

- Select “Transactions” from the menu, below “My Organization”.
- Select the yellow button “Filter” to organize the transactions by date, payment method or to look for a specific person.



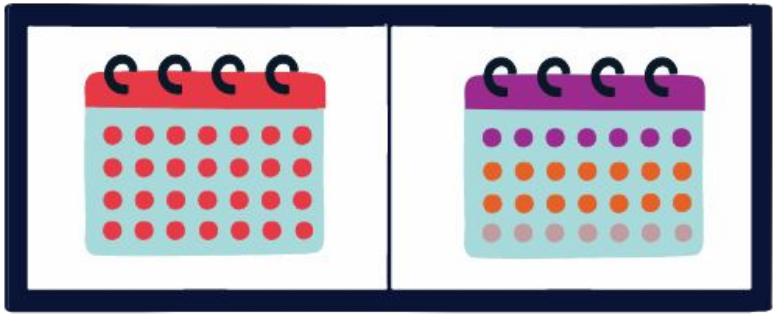
You may notice some transactions marked as "declined." This isn’t due the platform; more often than not, it occurs because people do not enter their details correctly or the bank has put a block on the use of the card. We recommend that the person tries again or uses another payment method.

7. Transferring your funds

7. Transferring your funds

7.1 Timeline of monthly transfers

The payment process for recurring donations occurs on a monthly basis and takes between 2 to 3 weeks following the end of each month. This time allows for all transactions to be processed, including any clarifications that may have arisen.



The organization receives the donations of the month

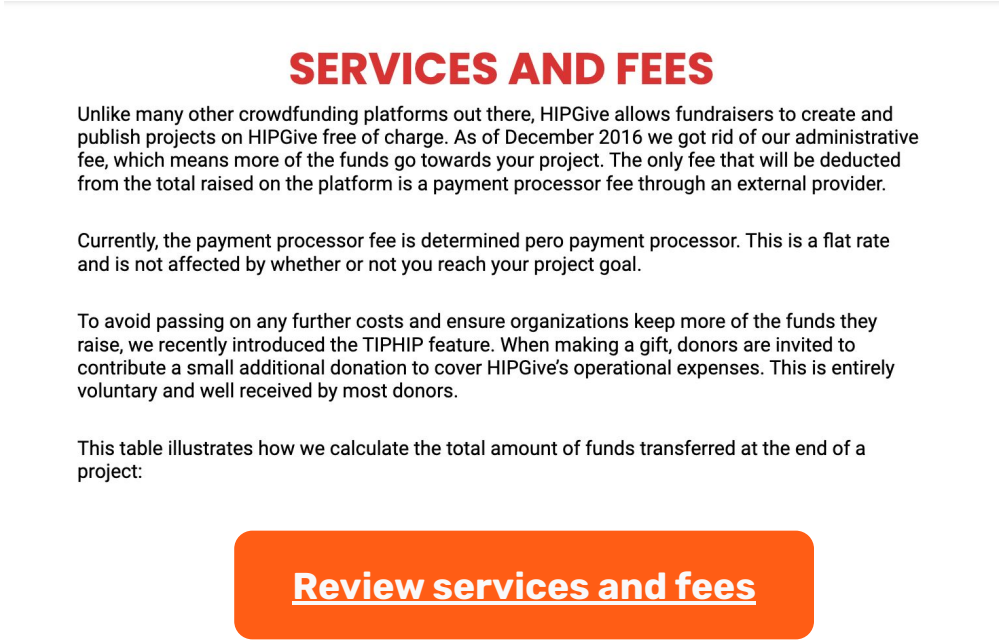
Reconciliation process

Funds transfer

7.2 Services and fees

Recurring giving campaigns have an administrative cost of 5% of the monthly transaction.

In addition, each contribution from your HIPGivers has a commission from the payment processors of 3.5% on average.



7.3 Funds Transfer Process

The funds you raise through your organization's page will be sent via a bank transfer, based on the banking information you have provided on the platform, along with the documents.

When the payment is ready to be made, we will send an email confirming the amount of funds raised during the period, any additional funds if applicable, the deducted payment processor fee, the HIPGive fee, and the final transfer amount.

To determine the total amount of funds, we use the following calculation:

Sum of contributions
- (Payment processor fees)
- (HIPGive fee)
= TOTAL of the monthly transfer

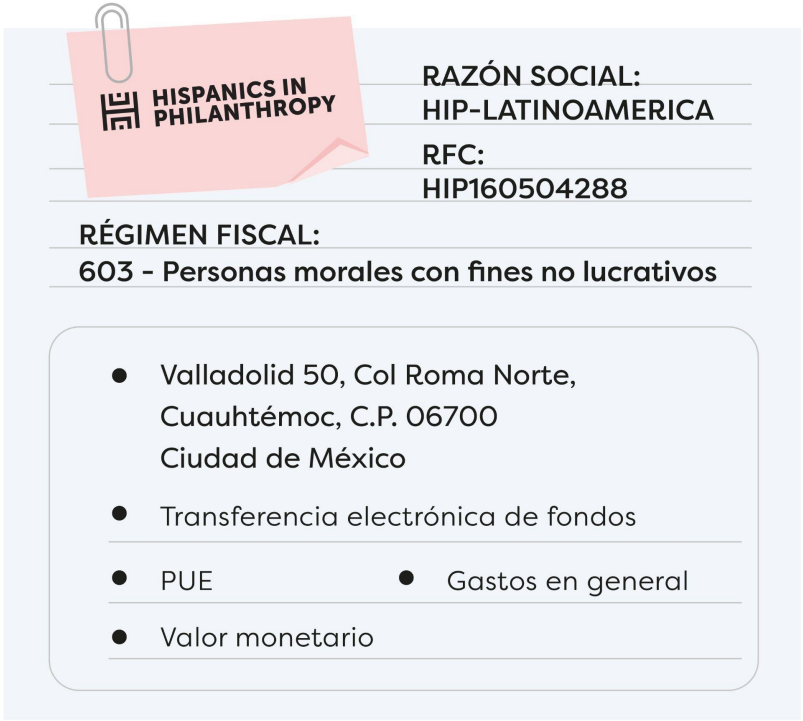
For “donatarias autorizadas” in Mexico

- If your organization is a donataria autorizada, you will need to issue a tax-deductible CFDI for each amount disbursed monthly.

You will receive the fund transfer from HIP-Latinoamérica A.C. in Mexico. The CFDI must have the following information:

- Razón Social (Legal Name): HIP-LATINOAMERICA
- RFC: HIP160504288
- Address: Valladolid 50, Col Roma Norte, Cuauhtémoc, C.P. 06700 Ciudad de México

Additionally, you should consider the following details:
- Payment Method: 03 - Transferencia electrónica de fondos
- Payment: PUE
- Uso CFD (CFDI Use)I: G03 - Gastos en general.
- Clave de unidad: M4 - Valor monetario



8. FAQs

8. FAQs

Who can use HIPGive to coordinate a recurring giving campaign?

HIPGive is a platform for nonprofit organizations based in the United States or Latin America. Since we are also a nonprofit organization, we are required to ask participating organizations to verify that they are a legally established nonprofit and that the majority of the beneficiaries of the project are Latinx.

When creating your account on HIPGive, you will be asked to attach a document verifying your nonprofit status, typically the letter from the IRS confirming the 501(c)(3) status or, if you are an organization from Latin America, the articles of incorporation.

We will also request the following documents and information:

- Financial statements from the previous fiscal year (or IRS 990 Form for US-based organizations)
- List of Board Members
- Budget for the current fiscal year
- Tax Identification Number
- Fiscal Sponsor Agreement (if applicable)
- Completed Legal Information tab on the platform
- Completed Bank Information tab on the platform

If you have opted to use the platform as a donataria autorizada in Mexico, you will also need to upload the following documents:

- Official letter as Donataria Autorizada from the SAT
- Power of attorney
- Official identification of legal representative
- Bank account statement (must match the account data registered in the "Bank information" section)

How much does it cost to set up a recurring giving campaign on HIPGive?

Creating your recurring giving profile on HIPGive is free. However, once you start receiving contributions, a transaction fee of 5% and a bank fee of approximately 3.5% will be applied. The bank fee may vary depending on the payment method, so you can check the full list of payment methods and fees here.

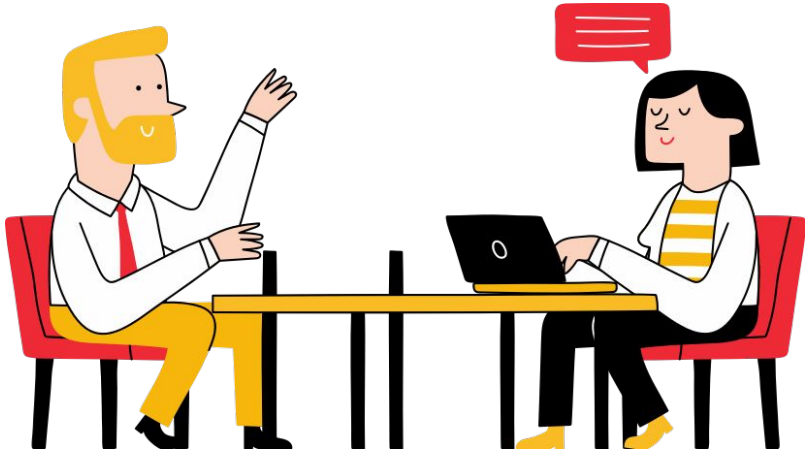
Which payment methods do you accept?

HIPGive accepts payments via credit card, debit card and PayPal.

If the organization is an authorized tax exempt organization in Mexico, you may also contribute via an electronic bank transfer (SPEI) or by downloading a code and making your payment in a convenience store.

Is HIPGive a secure site?

Yes. The system is tested manually and automatically every day to guarantee each and every operation is secure. The payment processors that we use are certified as Level 1 Service Providers within the Payment Card Industry Data Security Standard (PCI DSS) which requires an independent annual audit of their processes and systems.



Will I receive a tax deductible receipt for my contribution?

Yes, all donations can be tax deductible in the United States and, in some cases, in Mexico.

Immediately after completing a donation, you will receive an email confirming the transaction. If you opted to receive a tax deductible receipt as you made your contribution, this email will also serve as a tax deductible receipt in the US. Hispanics in Philanthropy is a 501(c)(3) non-profit organization with tax identification number 94-3040607.

An exception to the above is when the organization to which you contributed is an authorized tax exempt organization in Mexico and is registered as such on the platform. In this case, if you chose to receive a valid tax deductible receipt in Mexico and included your fiscal information, you will receive another email with a Tax Receipt (CFDI) valid in Mexico.

Contact us:

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Follow us:

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