

Wrapping Up Your Giving Day



Meet your Trainer...

Dan Mathias

Training Specialist,
EveryAction & GiveGab

Submitting Your Questions



Chat Box



Q&A

To: All panelists

Type: All panelists and attendees

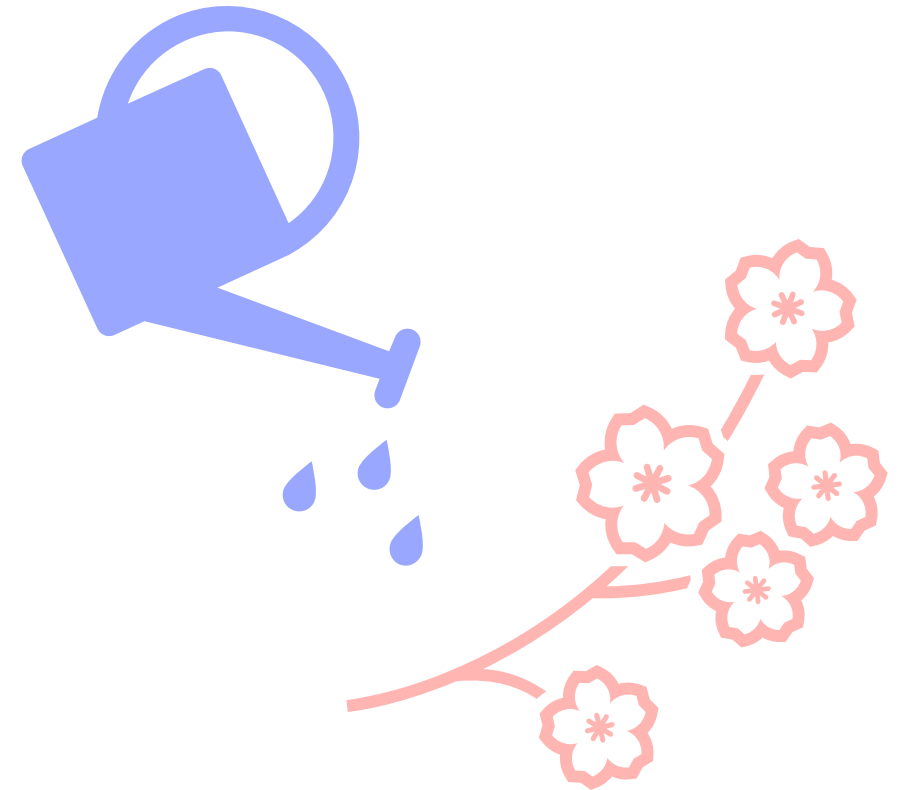
Please input your question

Send Anonymously

If you have questions or comments throughout our training, please write in using your Zoom webinar attendee panel.

Agenda

- Giving Day Updates & Reminders
- Your Checklist for Success
- After Your Giving Day
- Next Steps
- Q&A



Giving Day Updates and Reminders

- Confirm your Giving Day's URL and Dates/Times!
- Ensure you have your donation open and close windows set.
 - This includes matches and challenges!
- Set your Prizes.
- Confirm that you've linked your Social Media Feeds correctly.

Your Checklist for Success

Gathering our Ingredients

- ❑ Ready for Donations?
- ❑ The Perfect Profile
- ❑ Gamify with Matches & Challenges
- ❑ Engage Ambassadors
- ❑ Prepare Communications



Are you verified to collect donations?

✓ Add Your Organization's Info >

✓ Add Your Story >

✓ Get Verified to Collect Donations ▾

Status: Verified

Hooray! Your organization has been verified to accept donations on GiveGab.

- ✓ Confirmed state fundraising compliance
- ✓ Bank account and organization information verified

Is Your Profile Complete?

Have you:

- Added your logo and a cover photo?
- Shared an authentic story?
- Set goals?
- Included clear calls to action?
- Featured visual content?
- Highlighted donation levels?
- Invited your fundraisers?

- ✓ Add Your Organization's Info >
- ✓ Add Your Story >
- ✓ Get Verified to Collect Donations >
- ✓ Add Donation Levels >
- ✓ Add a 'Thank You' Message >
- ✓ Add Fundraisers >

Is Your Profile Complete?



Pawsitive Change Day

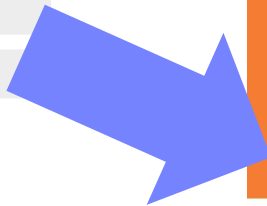
\$5,700.00 Raised • 5 Donors • 5 Gifts

Analytics

Get Set Up

Complete the steps below to be sure that you are set up and ready to participate in Pawsitive Change Day.

- ✓ Add Your Organization's Info
- ✓ Add Your Story
- ✓ Get Verified to Collect Donations
- ✓ Add Donation Levels
- ✓ Add a 'Thank You' Message
- ✓ Add a 'Give Again' Message
- ✓ Add Fundraisers



National Association of Dog Owners

DONATE FUNDRAISE

\$75 <i>You can sponsor one dog adoption!</i>	\$150 <i>Sponsor a dog adoption and medical coverage!</i>	\$300 <i>You can help feed the dogs in the shelter for a month!</i>	\$1,000 <i>How much could a \$1000 donation really do for a no-kill shelter? Find out!</i>
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CHOOSE YOUR OWN AMOUNT

Have You Secured Matching Gifts?

- Organizations who set up a Match or Challenges for their Giving Days raise more than 5x more than those that don't on average.
- Set up your match in a way that draws donor attention.
- Credit your sponsors to encourage cross-promotion.
- There's still plenty of time to start this year!
- First time? Keep it simple.



Your Matching To-Do List

- ❑ Identify sponsors to ask
- ❑ Secure commitment
- ❑ Add Matches and Challenges your Giving Day profile
- ❑ Verify your match setup with Bonterra support
- ❑ Curate communications to highlight your match



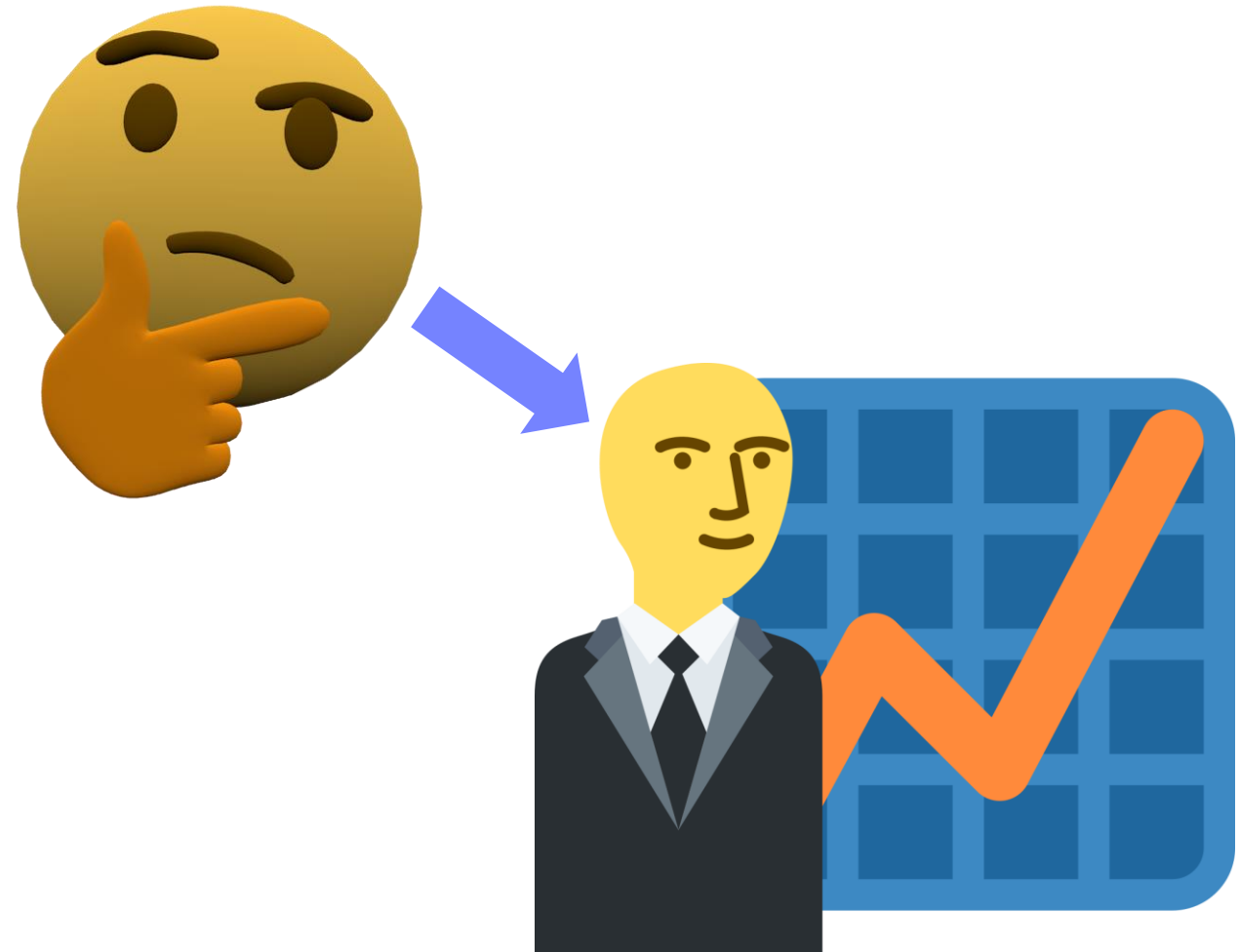
Do You Have Fundraisers?

- **Expand your organization's reach** by asking individuals to share your page
- Go one step further: Ask them to create their very own Peer-to-Peer Fundraiser page
- *Anyone* can be an ambassador or a fundraiser



Setting Fundraisers Up For Success

- Set up a quick info session for your P2P Fundraisers.
- Walk them through the Giving Day Fundraiser Guide.
- Communicate your organization's goals.
- Create a simple, suggested timeline for communications.
- Provide them with the links they need to share out.
- Walk P2P Fundraisers through creating their profile.



Setting Your Fundraisers Up For Success



Start Early

- Educate your fundraisers
- Understand their capacity for this ask



Be Clear

- Be transparent with your goals
- Set expectations for your fundraisers



Make It Easy

- Provide the content they need
- Take time to check-in

Strategizing and Planning for P2P Fundraising

4 Steps to P2P Fundraising Success

1. Select individuals who will be your loudest voices.
2. Communicate that storytelling is vital, and can replace a direct “ask”.
3. Steward your fundraisers.
4. Make it fun!



Identify Potential Fundraisers

- Board Members
- Family and Friends
- Staff
- Volunteers
- Beneficiaries
- Donors
- Community Members
- Local Influences
- Businesses

Capture Fundraiser Stories

Motivate fundraisers to share their personal connection to your mission by asking these questions:

- What made you decide to get involved?
- What do you wish everyone knew about this organization?
- Why do you enjoy giving to our organization?
- What is your favorite program or service and why?
- How do you feel after [working at, volunteering at] our organization?

Steward Your Fundraisers


- Treat fundraisers like major donors.
- Acknowledge fundraising for your organization as a higher level of participation.
- Recognize those who raise a lot for your cause .
- Invest in your long term relationships.
- Ensure your fundraisers have a great experience regardless of how much they raise.















Using Bonterra's P2P Fundraisers Tool

Demo

- Navigate to the **Fundraisers Tab** of your Giving Day Dashboard
- Set a default story and goal for your P2Ps.
- Make fundraising invite-only, or open to anyone interested.

 Add Fundraisers ▼

Search Fundraisers: [Download CSV](#) [Add Fundraisers](#) [Upload Fundraisers](#) [Message All](#)

Fundraiser ▼	Fundraiser Display Name	Donors ▼	Amount Raised ▼	Goal ▼	Email	Phone	Actions
Ronny Woodward	Veronica Woodward	1	\$4,000.00	\$500.00	veronwood@cooldogs.com		  
Feargus Doonan	Feargus Doonan	1	\$150.00	\$500.00	saofn23@concast.com		  
Johnny Golucki	Johnny Golucki	0	\$0.00	\$500.00	jgolu@fakeemail.com		  
Joe Holcomb	Joseph H	0	\$0.00	\$500.00	joelcomb@bonteratech.com		  

Allow New Fundraisers to Sign Up

Set Fundraisers' Story **Set Fundraisers' Goal**

\$.00

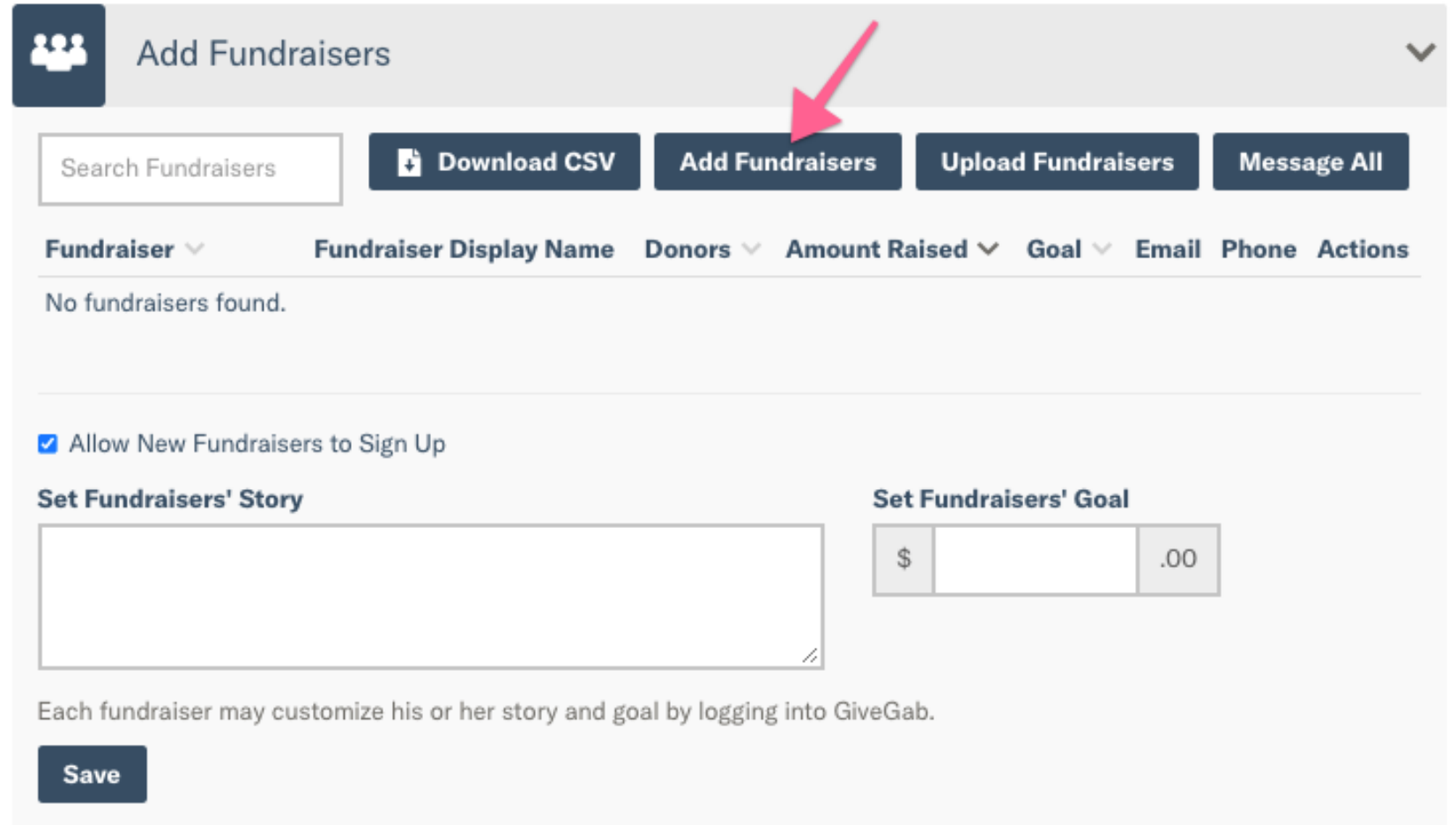
Each fundraiser may customize his or her story and goal by logging into GiveGab.

[Save](#)

[Reset Profile](#)

Demo

- Navigate to the Fundraisers Tab of your Giving Day Dashboard.
- Select “Add Fundraisers”



The screenshot shows the 'Add Fundraisers' interface. At the top, there is a header with a group icon and the text 'Add Fundraisers'. Below the header, there is a search bar labeled 'Search Fundraisers' and four buttons: 'Download CSV', 'Add Fundraisers', 'Upload Fundraisers', and 'Message All'. A red arrow points to the 'Add Fundraisers' button. Below the buttons, there is a table header with columns: 'Fundraiser', 'Fundraiser Display Name', 'Donors', 'Amount Raised', 'Goal', 'Email', 'Phone', and 'Actions'. The table content shows 'No fundraisers found.'. Below the table, there is a checkbox labeled 'Allow New Fundraisers to Sign Up' which is checked. There are two sections: 'Set Fundraisers' Story' with a text area, and 'Set Fundraisers' Goal' with a currency selector '\$', a text input, and a decimal input '.00'. At the bottom, there is a 'Save' button and a note: 'Each fundraiser may customize his or her story and goal by logging into GiveGab.'

Demo

Invite one or multiple fundraisers at once. You will need their first name, last name, and email address.

Add Fundraisers

Fundraiser Display Name (optional)

Class of 1999

First Name **Last Name** **Email**

Laryssa Hebert test@givegab.com ✕

Fundraiser Display Name (optional)


Class of 2000

First Name **Last Name** **Email**

Jane Doe test2@givegab.com ✕

+ New Fundraiser

Cancel **Next: Compose Your Message**



Do You Have a Communications Plan?

Plan your online communications ahead of the day!

- How many posts and when?
- What will your content look like? Examples below:
 - Announcement/Save the Date
 - Campaign Countdown

No need to start from scratch! Customize the templates available in your Giving Day Nonprofit Toolkit



How Will You Communicate?

- Utilize multiple online channels
 - Social Media
 - Email and direct mail communications
- **C.O.P.E.** Create Once, Post Everywhere!
- Curate authentic visual content

Pro Tip: Create QR codes for your profile



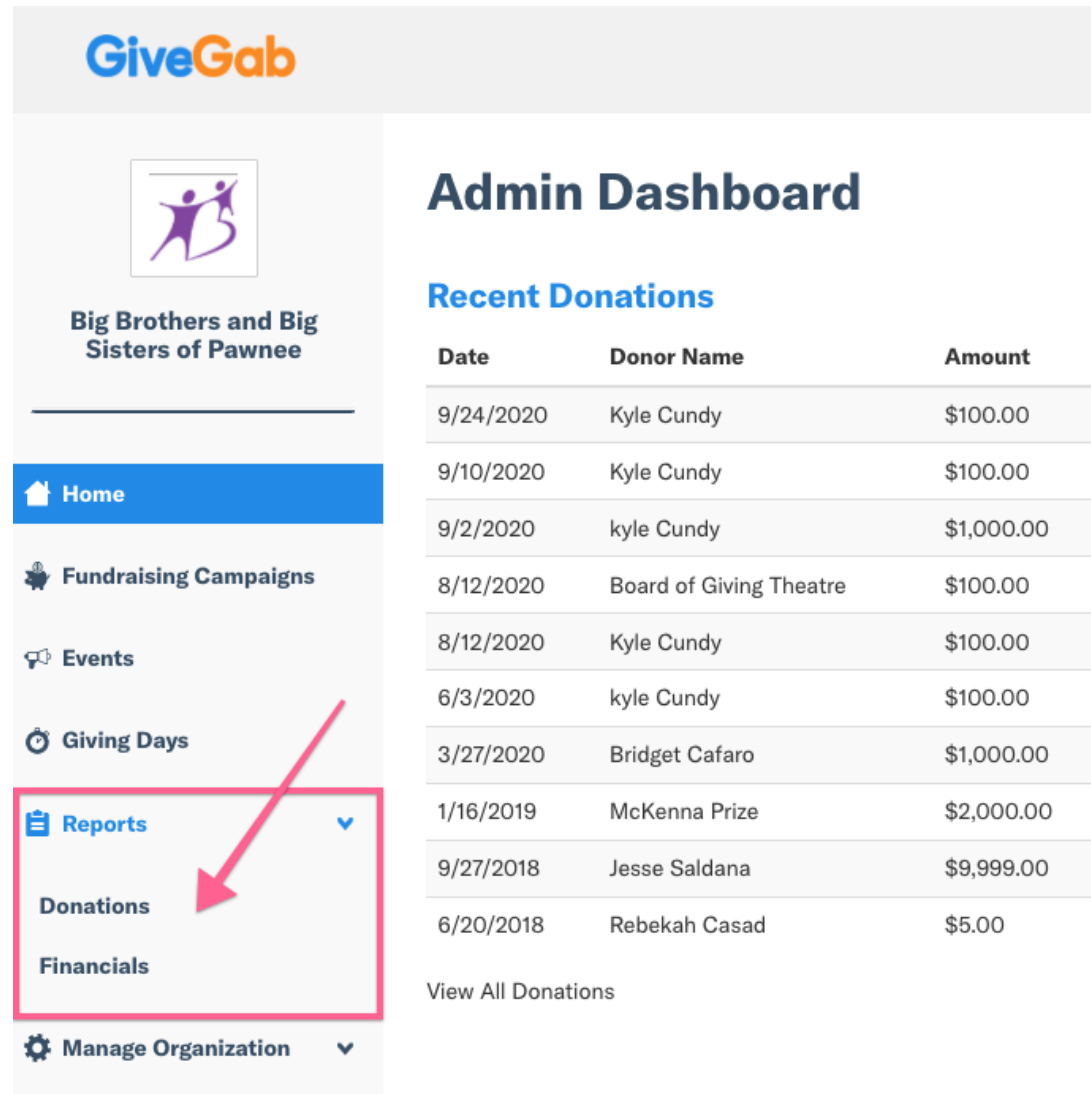
After Your Giving Day

How Will You Get Your Donations?

- Donations will be deposited on a rolling basis 5-7 business days after a gift is made
- Deposits will appear on your account from “Stripe”
- Reference your new Financials report to reconcile deposits!



Finding Your Donation Data



GiveGab

Big Brothers and Big Sisters of Pawnee

- Home
- Fundraising Campaigns
- Events
- Giving Days
- Reports**
 - Donations**
 - Financials
- Manage Organization

Admin Dashboard

Recent Donations

Date	Donor Name	Amount
9/24/2020	Kyle Cundy	\$100.00
9/10/2020	Kyle Cundy	\$100.00
9/2/2020	kyle Cundy	\$1,000.00
8/12/2020	Board of Giving Theatre	\$100.00
8/12/2020	Kyle Cundy	\$100.00
6/3/2020	kyle Cundy	\$100.00
3/27/2020	Bridget Cafaro	\$1,000.00
1/16/2019	McKenna Prize	\$2,000.00
9/27/2018	Jesse Saldana	\$9,999.00
6/20/2018	Rebekah Casad	\$5.00

[View All Donations](#)

Filtering Your Donation Data

GiveGab Home Support | Laryssa ▾

Pawnee Public Library

Home
Pawnee Gives (Support)
Reports ▾
Donations
Manage Organization ▾

Donations

i Dates and times on this page are displayed in your computer's time zone. If you export your donations from this page, dates and times in that file will appear in UTC to assist with bank statement reconciliation processes. [Learn More](#)










Search by name or email

All Giving Days & Community Giv ▾ All Campaigns ▾ Any Donation Type ▾

Start [calendar icon] [x] End [calendar icon] [x]

Actions	Donation ID	Date ▾	Donor ▾	Intended Donati
[edit icon] [plus icon]	6554	11/22/2021 12:42PM	katrina grein katrina@givegab.com	\$100.00

Exporting Your Donation Data

  	5467	2/10/2021 10:40AM	Laryssa Hebert laryssa.hebert@givegab.com	\$5.00
  	5439	2/2/2021 2:23PM	Jonathan Nay jon.nay11@givegab.com	\$25.00
  	5438	2/2/2021 2:21PM	Jonathan Nay jon.nay1@givegab.com	\$25.00

< > Page 2 of 2

 [Export CSV](#) [Edit Bank Account Info](#)



Viewing Dashboard for

Pawnee Public Library ^



Reconciliation Reporting

- In addition to your existing reports, you can better manage deposits to your account
- Understand your balance and donations from an accounting perspective
- Match each online gift to a deposit

The screenshot displays the Bonterra Pawnee Gives (Support) dashboard. The left sidebar contains navigation options: Home, Details, Content & Design, Manage Organizations, Engagement Tools, Donations (with a sub-option for Donation Report), Analytics, Site Admin Settings, and Purge Cache. The 'Financials' section is active, showing tabs for Balances, Payouts, Refunds, and Registration Payments. The 'Balances' section is expanded, displaying a table of financial data. The table includes columns for 'Start Date' and 'End Date', and rows for 'Donation Transactions' and 'Registration Transactions'. The 'Current' section shows a total balance of \$44,220.19.

Pawnee Gives (Support)
View Site

Financials
Balances Payouts Refunds Registration Payments

Balances

	Start Date	End Date
Donation Transactions	Select Start Date	Select End Date
Gross Amount: ⓘ		\$46,233.00
Net Amount: ⓘ		\$44,220.19
Total Number: ⓘ		62
Host Fees: ⓘ		\$0.00
Givegab Platform Fees: ⓘ		\$970.98
Processing Fees: ⓘ		\$1,106.21
Registration Transactions		
Gross Amount: ⓘ		\$0.00
Net Amount: ⓘ		\$0.00
Givegab Platform Fees: ⓘ		\$0.00
Processing Fees: ⓘ		\$0.00
Current		
Total balance: ⓘ		\$44,220.19
Pending refunds: ⓘ		\$0.00
Pending disputes: ⓘ		\$0.00
Total in reserve: ⓘ		\$0.00
Total balance to payout: ⓘ		\$44,220.19

Switch to Old View

Thanking Your Donors

- Start during and right after the day!
- Treat your donors like your heroes
- Talk about how their gift had a tangible impact, and what you were able to achieve as a result
- Review your donor data, and compare it to previous years
- Watch the Donor Stewardship training video!

THANKS!



Thanking Your Donors

Pre-schedule general messaging to all supporters

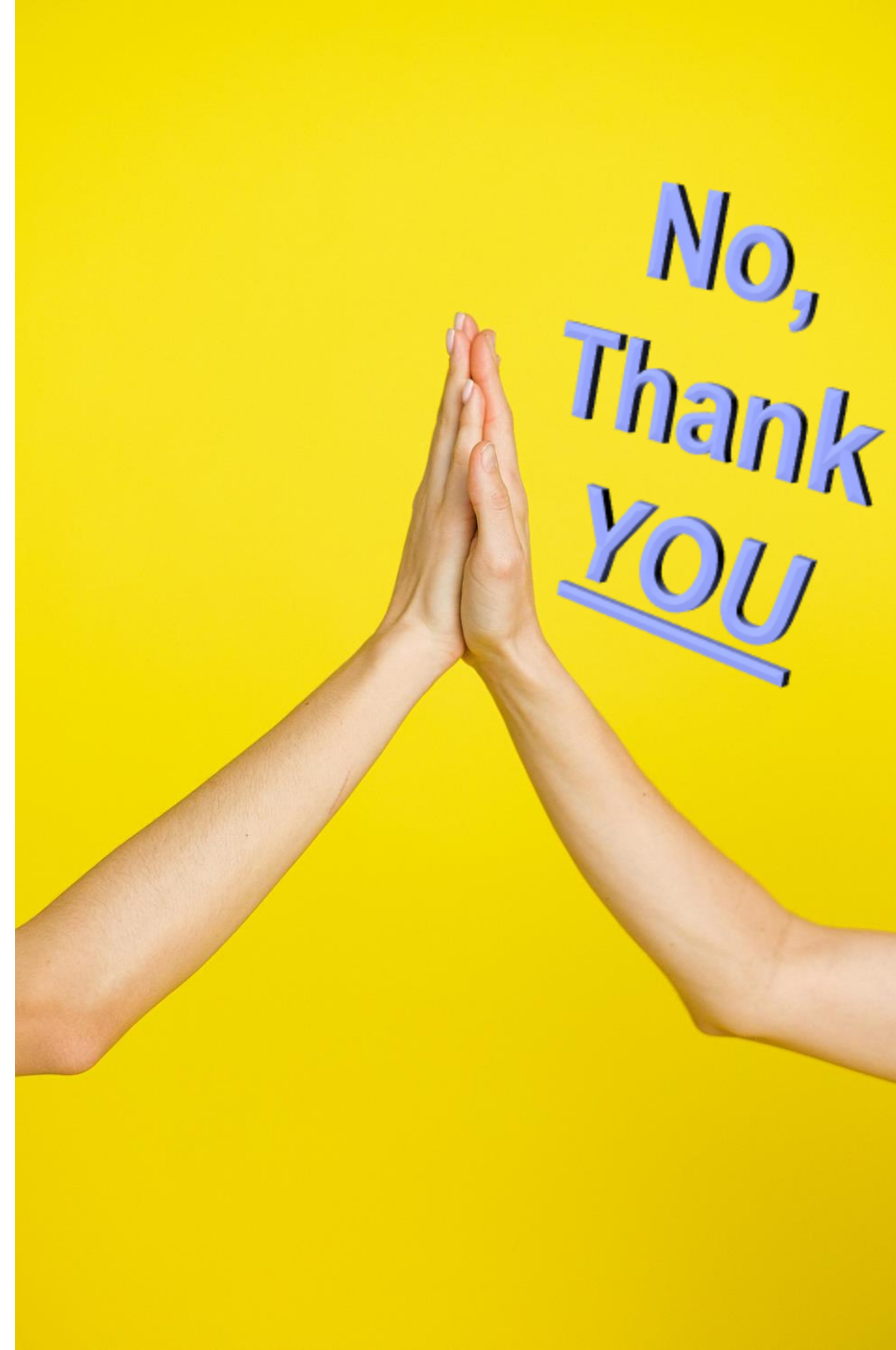
- Social media posts and overall success updates
- Thank You email to your organization's email list

Follow up with individual donors

- Access their contact information in your GiveGab Dashboard, keep an eye out for anonymity!

Highlight impact of donor-funded projects with updates

- What did these donors do for your organization as a result?
 - This outreach can happen a few weeks after



Thank You Resources

- Customizable Email Templates and Stewardship Guides
- Sample Social Media Posts and Best Practices
- Giving Day Downloadable Graphics
- Resources for Board Members and P2P Fundraisers
- How-To Videos on the Trainings page

The screenshot shows the homepage for 'PAWNEE GIVES'. At the top, the title 'PAWNEE GIVES' is displayed in a large, serif font. To the right of the title is a search bar with the text 'Search...', a magnifying glass icon, and a 'LEADERBOARDS' button. Further right is a 'MENU' button with a downward arrow and a shopping cart icon. Below the title, the statistics '45 DONORS', '\$90,383 RAISED', and '6 ORGANIZATIONS' are shown. The main visual is a large photograph of a park with people sitting on a bench. Overlaid on the photo is the official seal of the City of Pawnee, Indiana, which features a bison, a settler, and a Native American, with the text 'CITY OF PAWNEE, INDIANA' and '1817'. A blue 'REGISTER' button is positioned over the photo. Below the seal, the text 'Bringing Pawnee together since 1817' and 'May 10, 2023' is displayed. At the bottom of the photo, a digital countdown timer shows 'Pawnee Gives (Support) begins in 00 : 00 : 00 : 00' with labels for 'days', 'hours', 'mins', and 'secs'. A 'Pause Animation' toggle is located in the bottom left corner of the image area. On the right side of the image, there are social media icons for Facebook, X, and Instagram.

Next Steps

Key Takeaways

- Make sure your profile reflects your story and your organization's voice
- Use authentic, visual content
- Work with your top supporters to be ambassadors or fundraisers
- Secure potential matches
- Develop a stewardship plan for your donors



Your Final Checklist

- Complete your profile
- Ensure you are verified to collect donations
- Keep an eye out for important emails!
- Follow your Giving Day on Social Media and use your #Hashtags
- Watch on-demand training course videos
- Check out the Nonprofit Toolkit



Don't Forget: We have your back!

Visit Our Help Center

- support.givegab.com

Check Out Our Blog

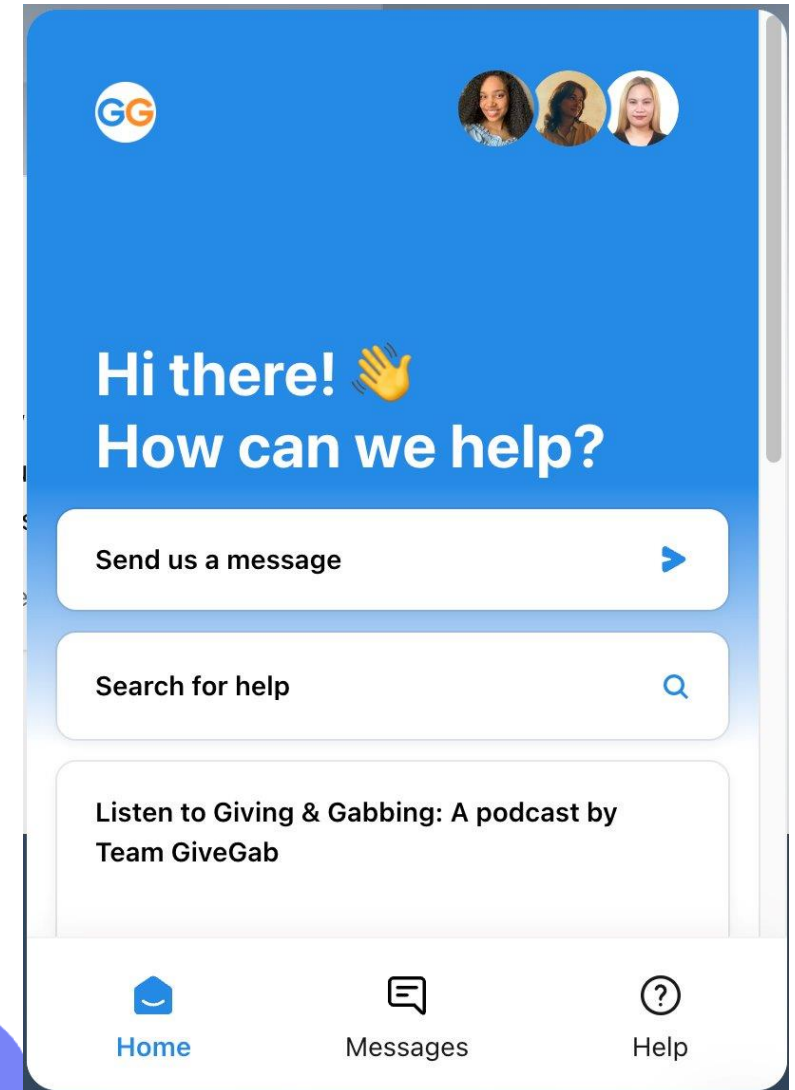
- bonterratech.com/blog

Send us an Email

- support@givegab.com

Chat with Bonterra's Customer Success Team

- Look for the little blue chat bubble



Questions?



Thank You for Attending!

