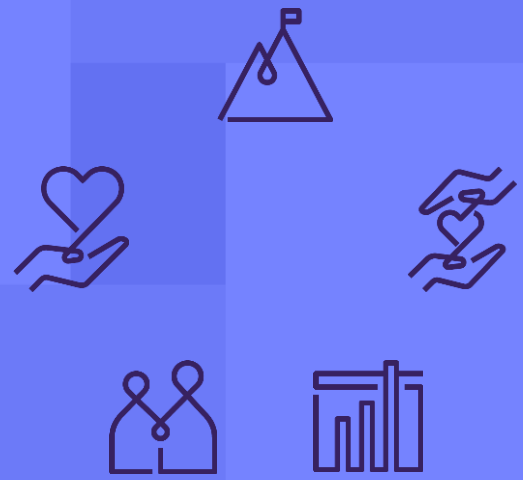
# Wrapping Up Your Giving Day



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# Meet your Trainer…

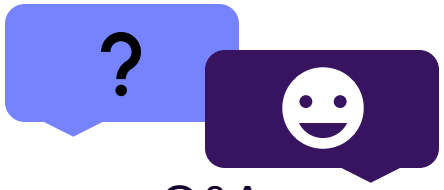
## Dan Mathias

Training Specialist,

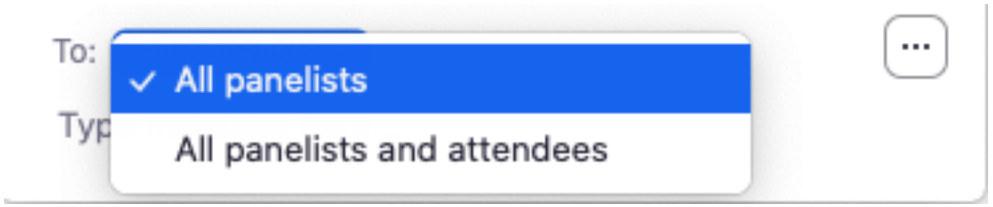
EveryAction & GiveGab

# Submitting Your Questions

Chat Box



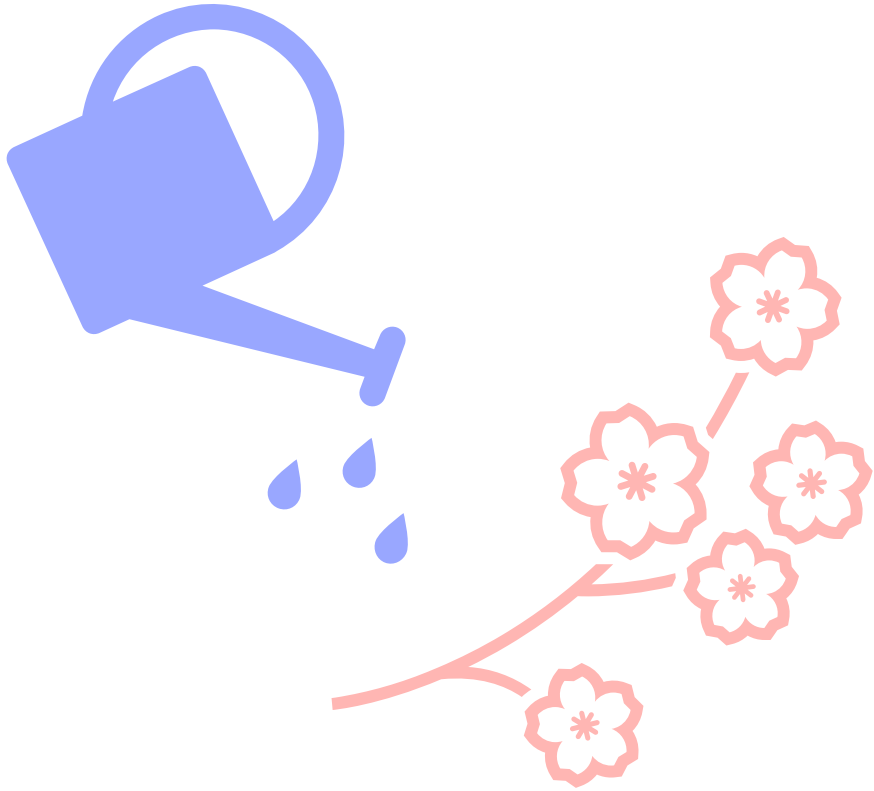
Q&A



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

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# Gathering our Ingredients

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

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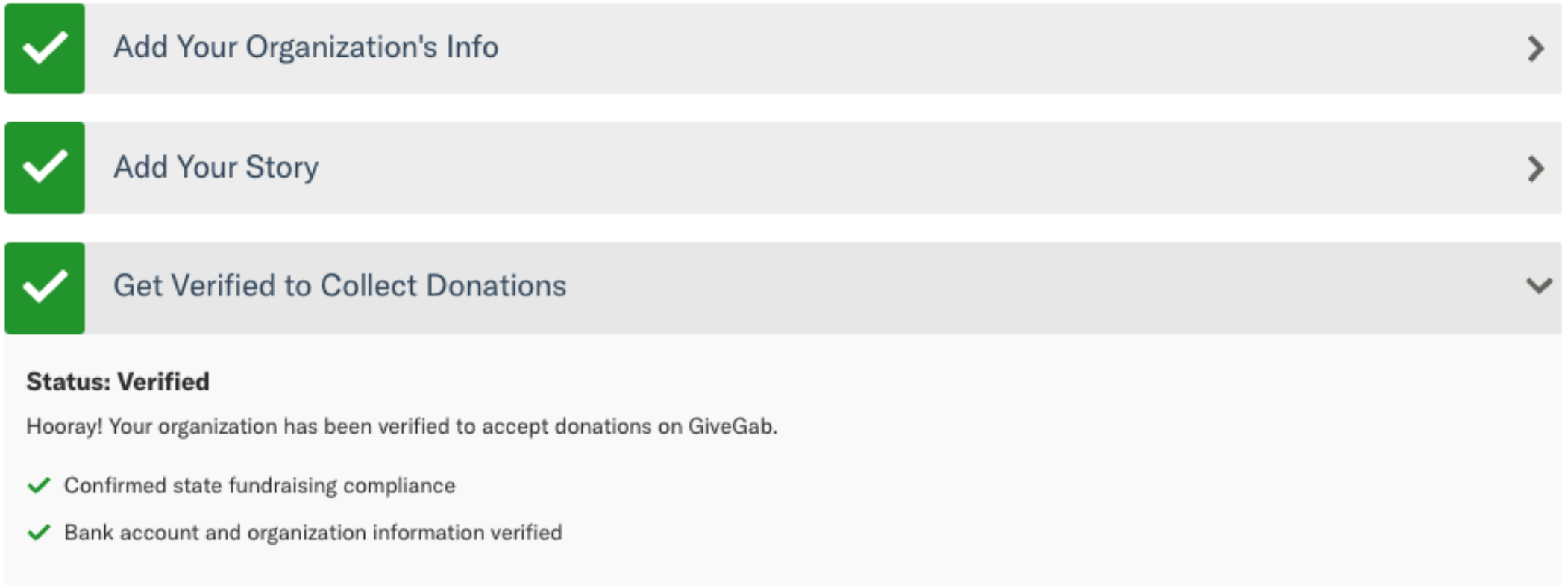
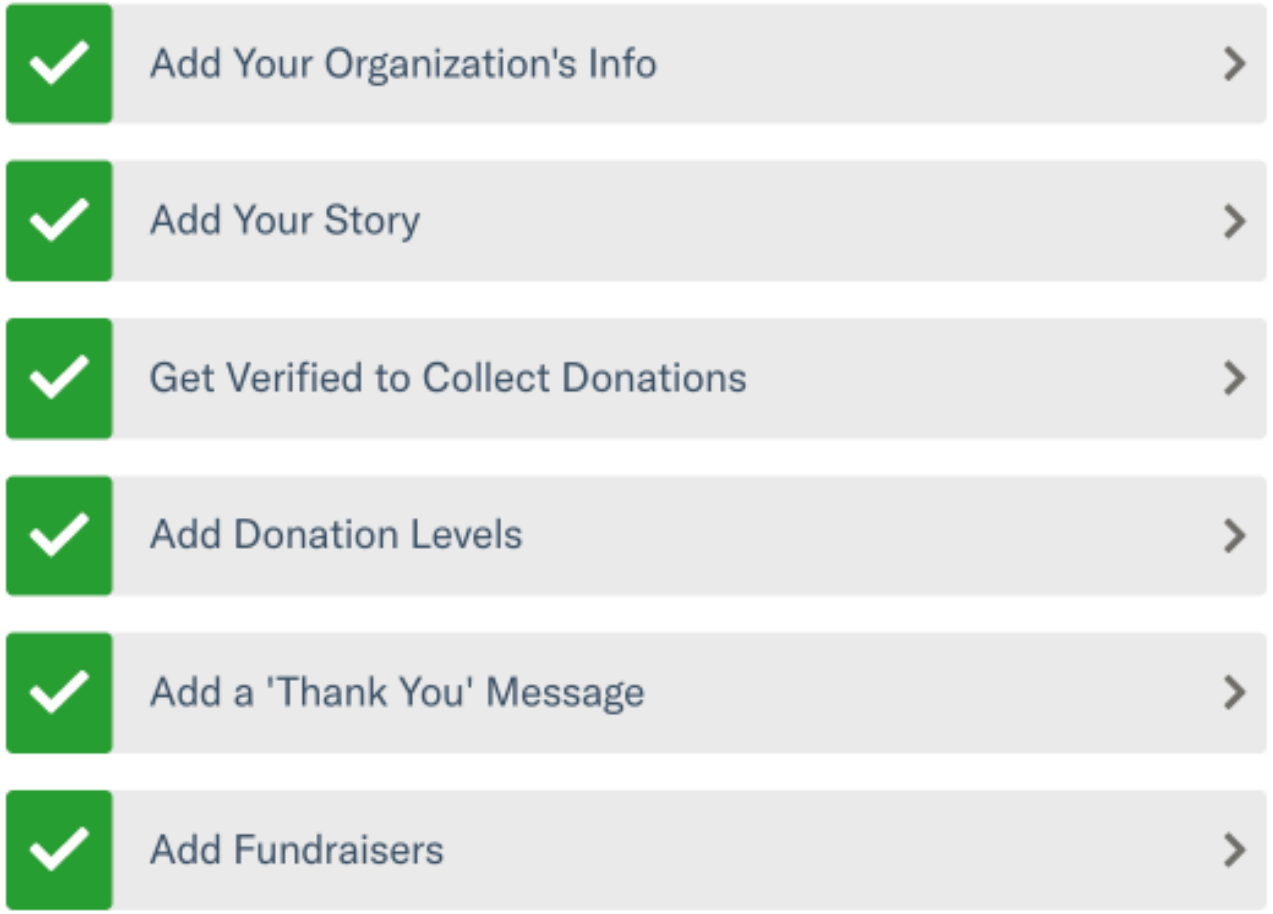
# Are you verified to collect donations?



# 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?



# 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 | $150 | $300 | $1,000 |
|---|---|---|---|
| *You can sponsor one dog adoption!* | *Sponsor a dog adoption and medical coverage!* | *You can help feed the dogs in the shelter for a month!* | *How much could a $1000 donation really do for a no-kill shelter? Find out!* |

CHOOSE YOUR OWN AMOUNT

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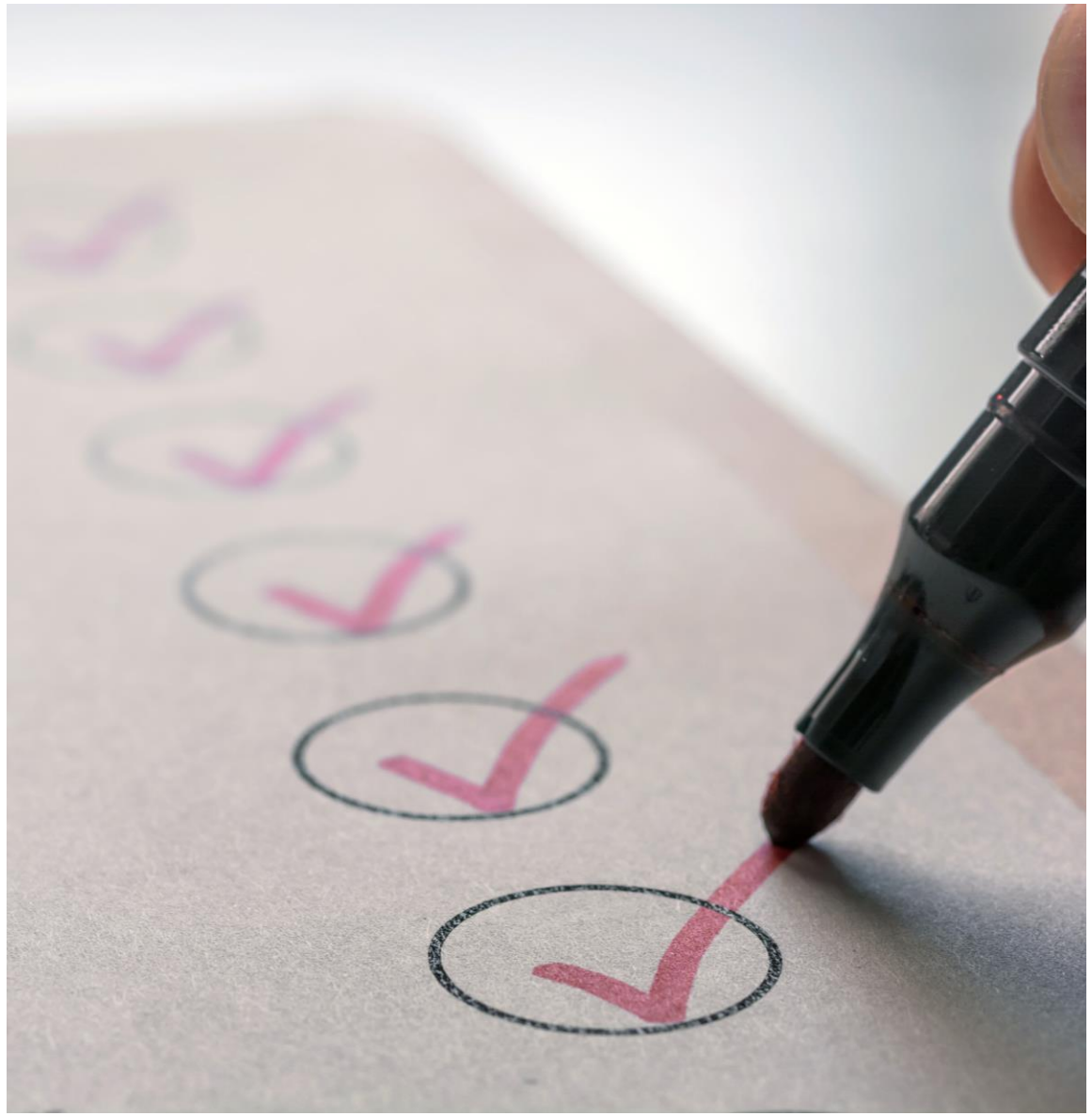
# Have You Secured Matching Gifts?

- Organizations who set up a Match or Challenges for their Giving Days raise more that 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



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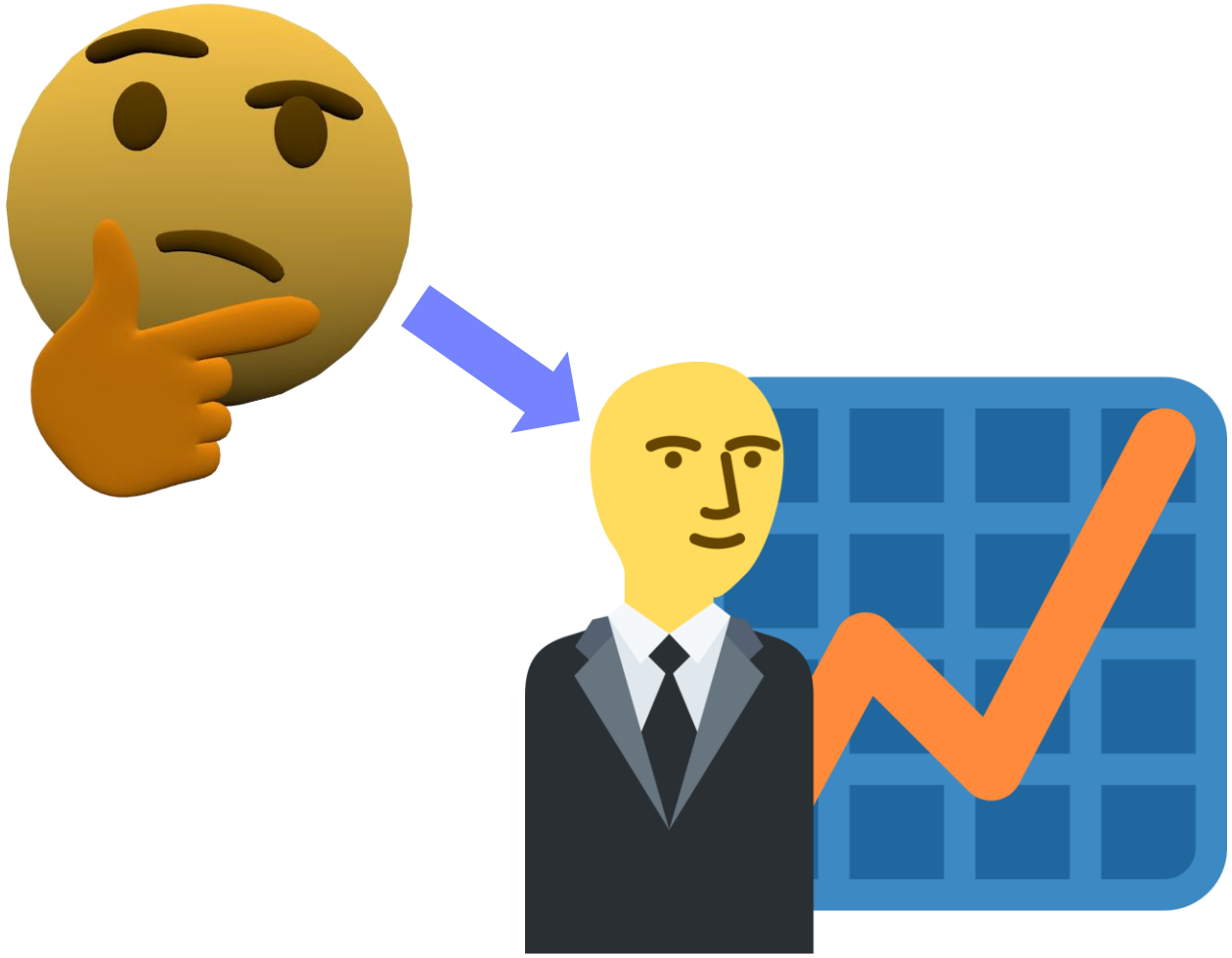
# Do You Have Fundraisers?

- **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

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# 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!

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# 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

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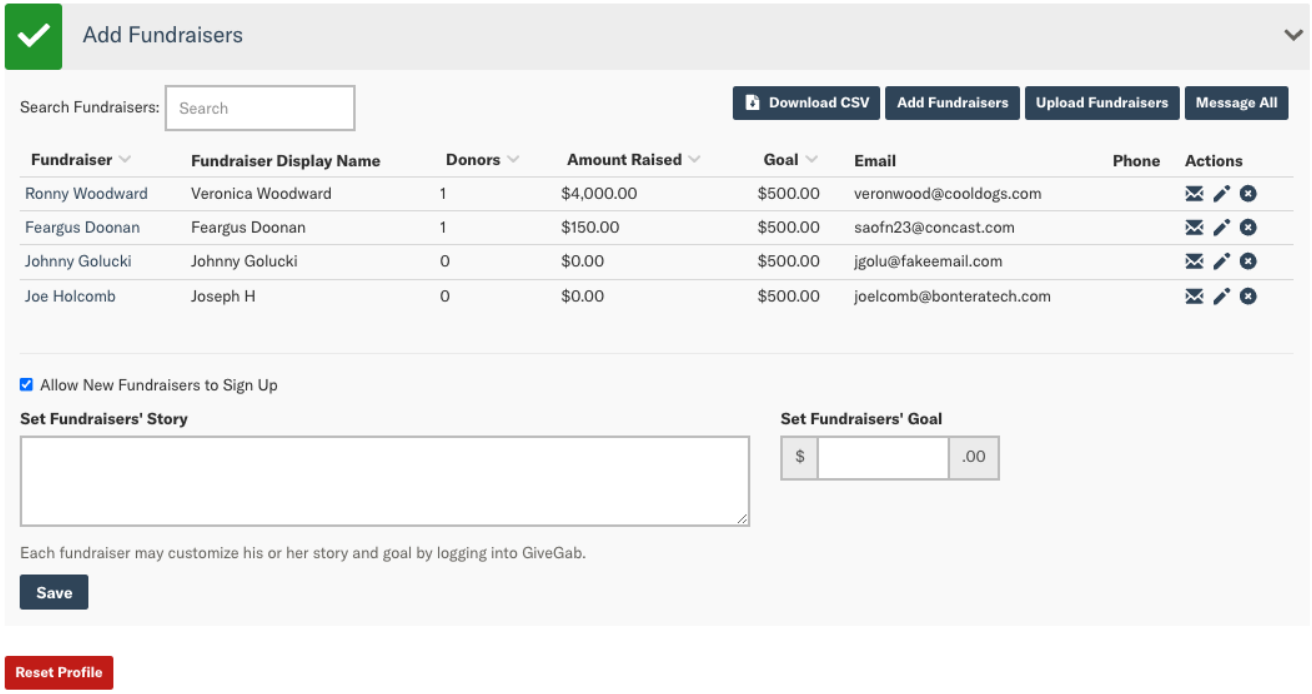
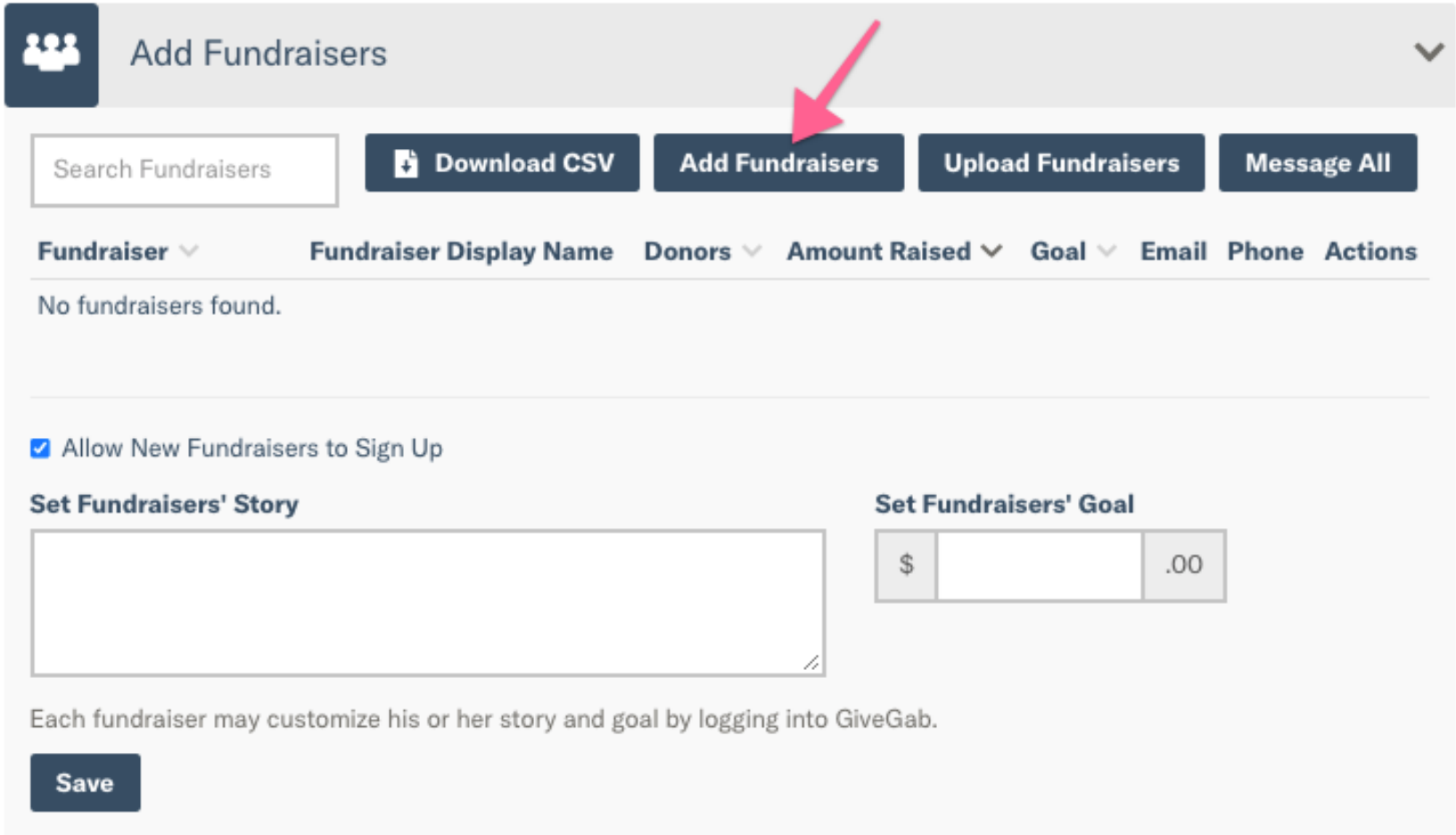
# Demo

- 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.



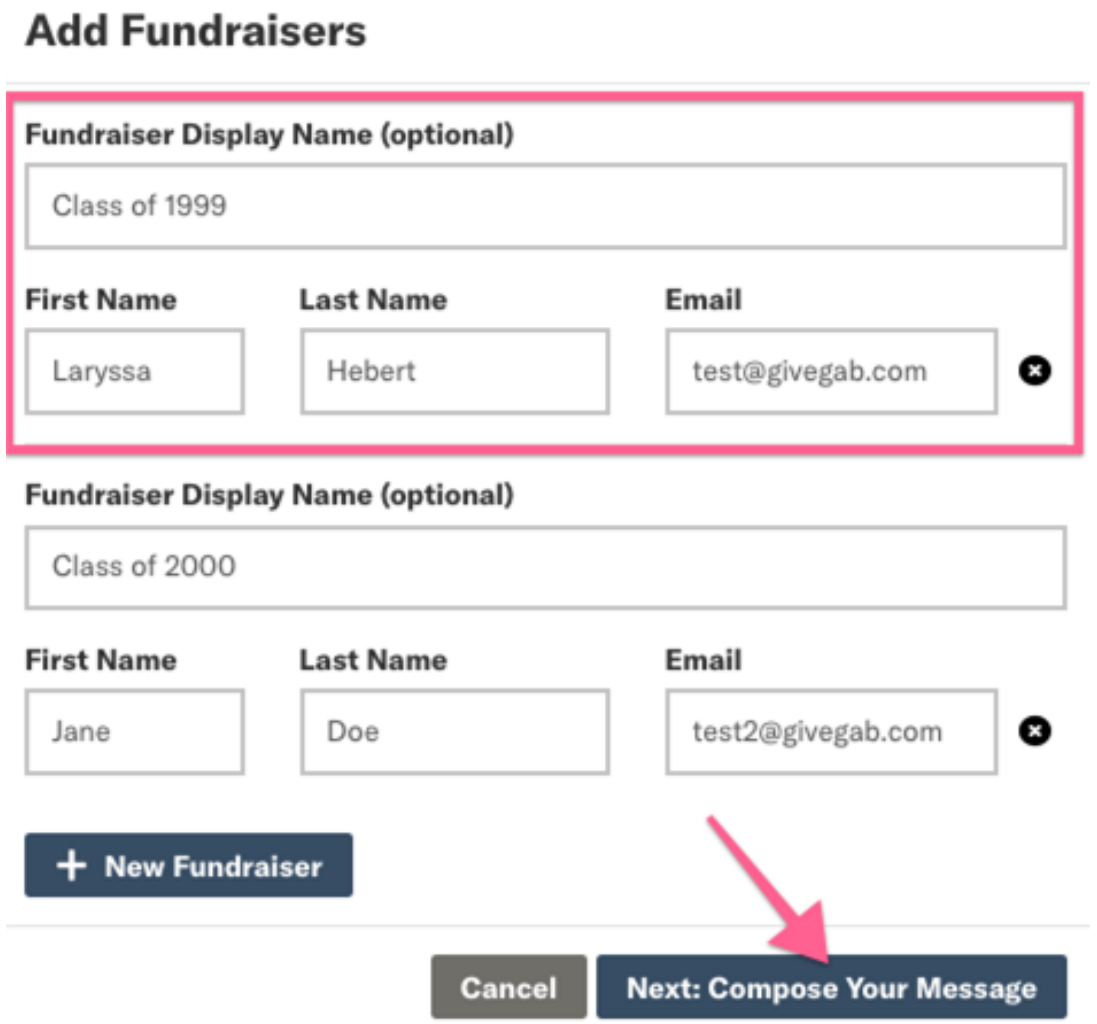
# Demo

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



# Demo

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



# 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

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# 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!

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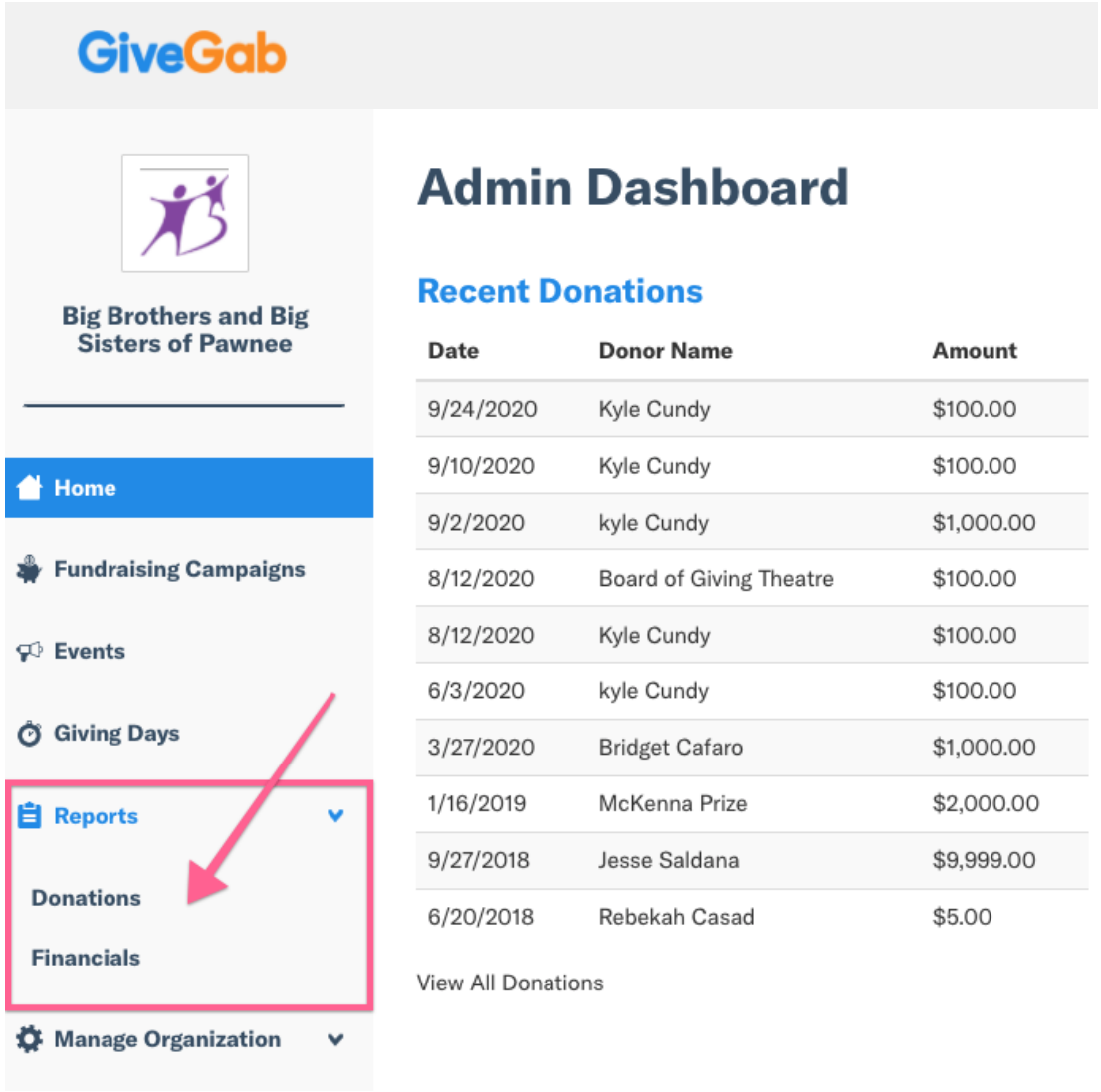
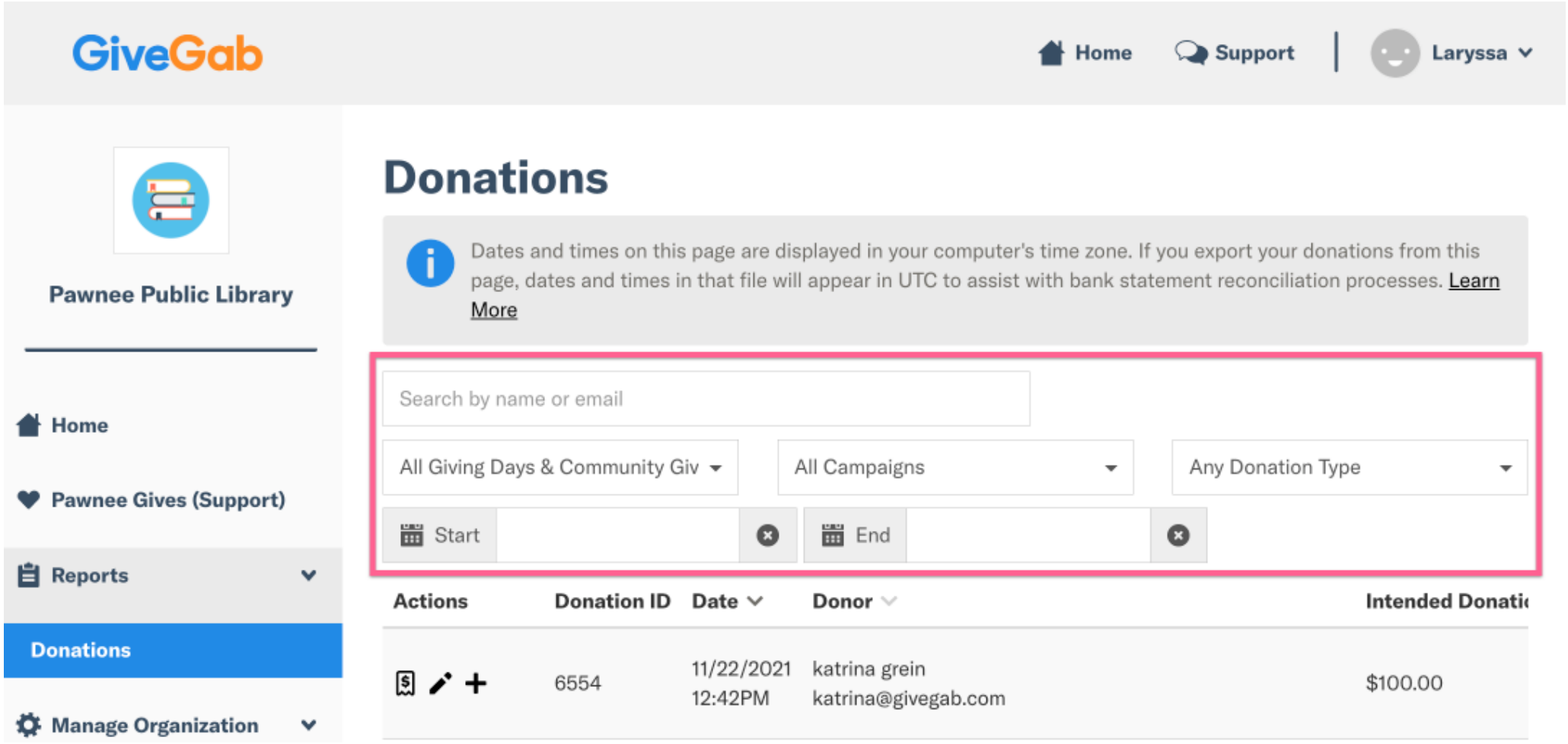
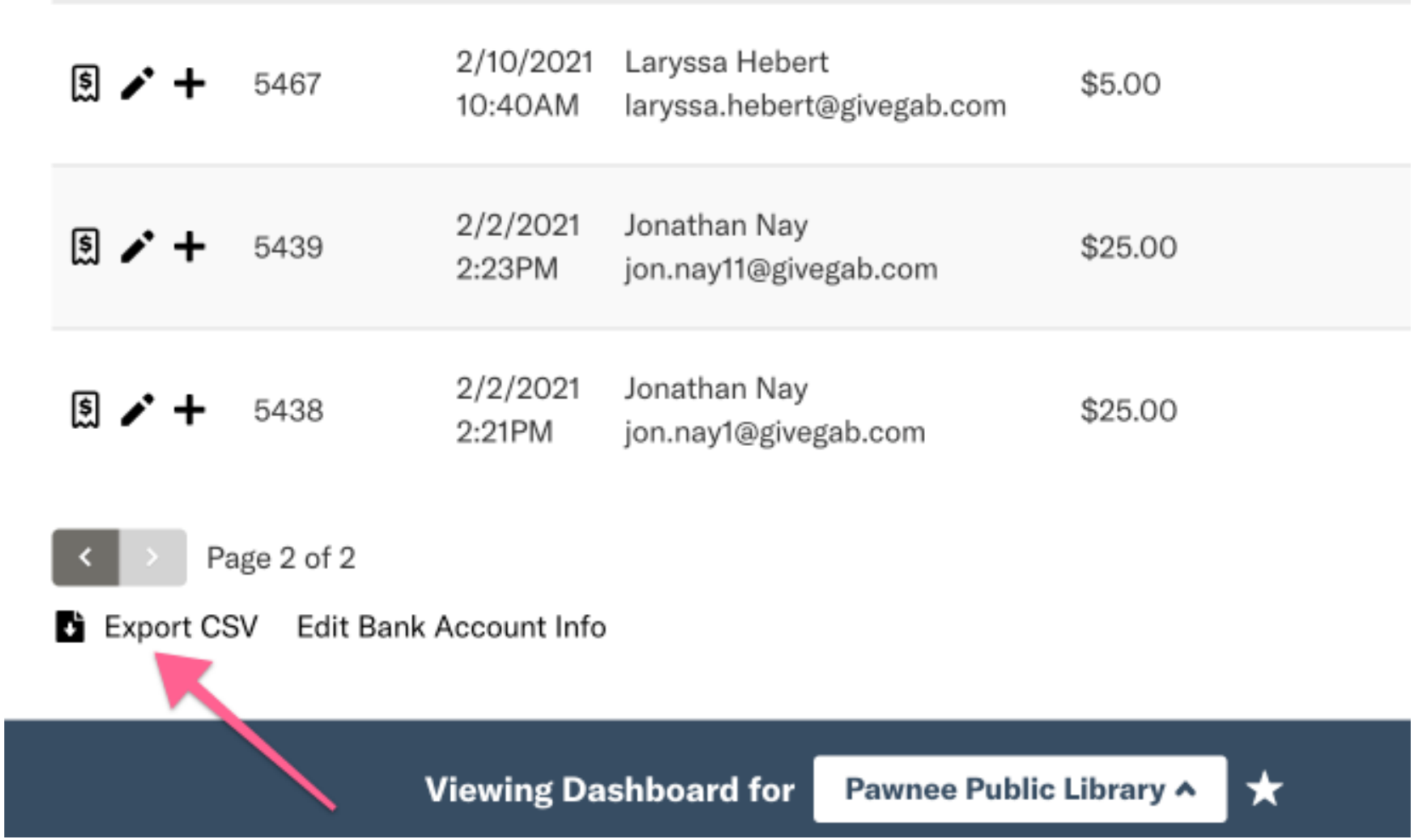
# Finding Your Donation Data



# Filtering Your Donation Data

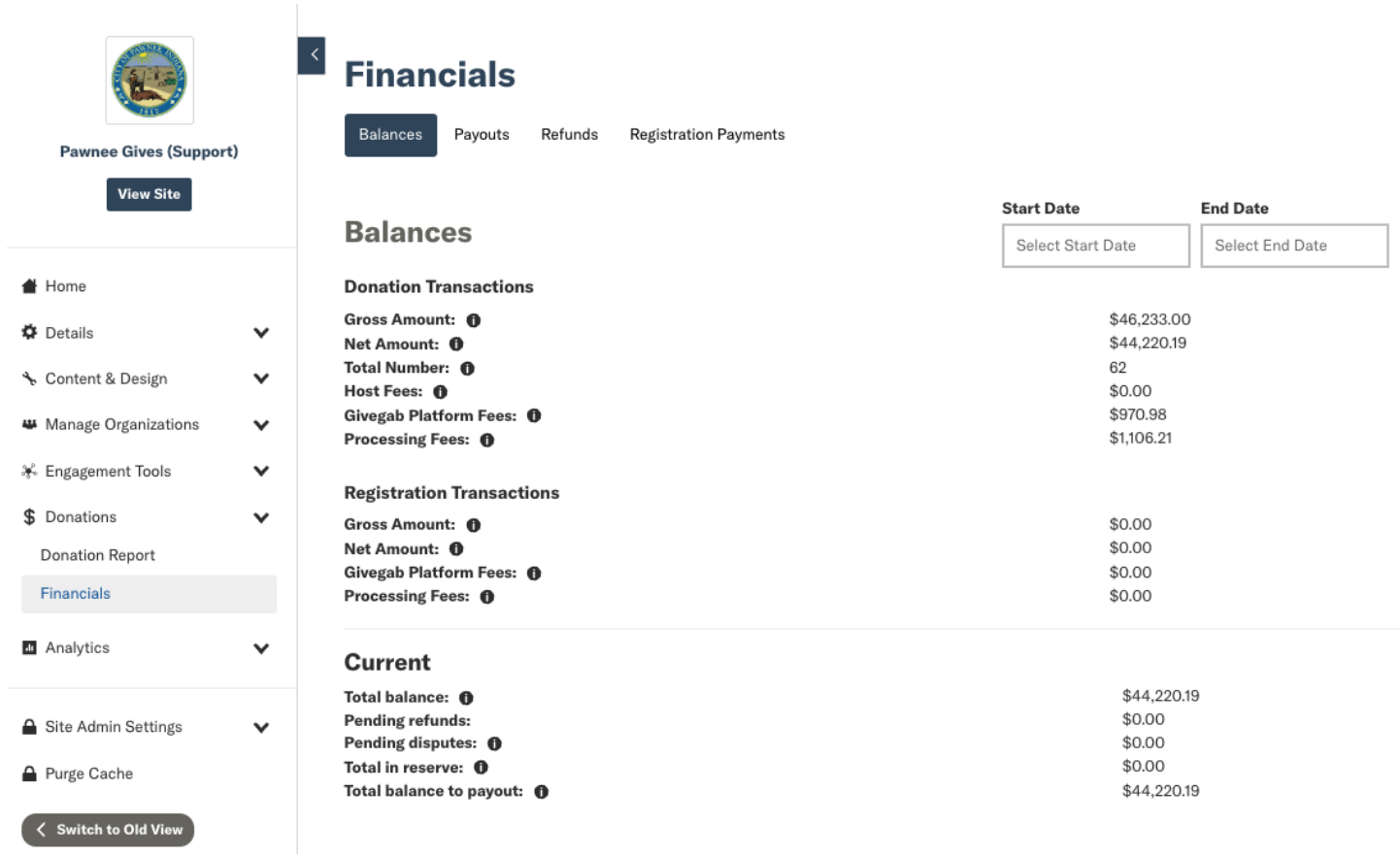


# Exporting Your Donation Data



# 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



# 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!

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# 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

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# 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

# Next Steps

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# 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

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# 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

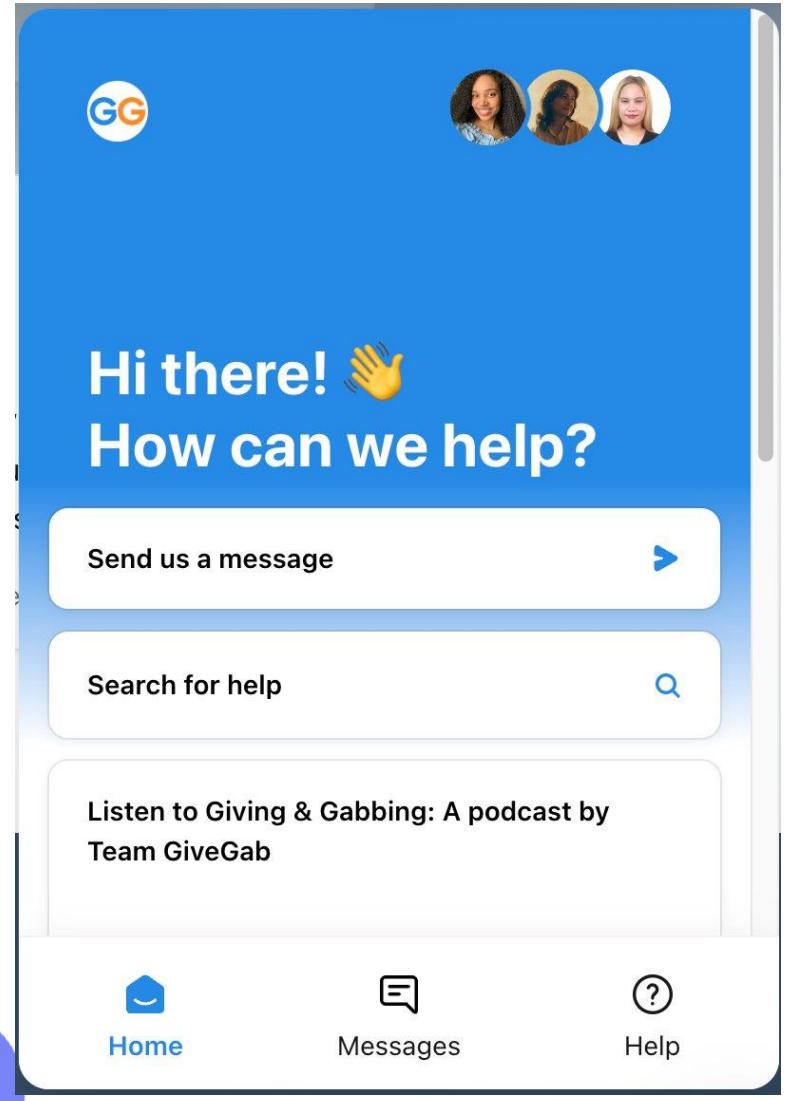
- bonterratech.com/blog

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!

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