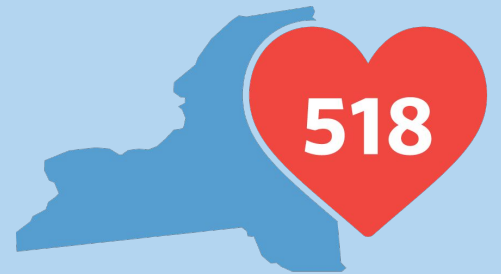


# Final Steps for *518 Day of Giving*

May 18, 2024



**DAY OF GIVING**

Powered By United Way of the Greater Capital Region

GiveGab is becoming  Bonterra.

# Submit Your Questions



Chat Box

To:  All panelists  
Type:  All panelists and attendees



Q&A

Please input your question

Send Anonymously

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

The recording will be posted on the **518 Day Trainings Page by April 19.**

# Today's Agenda

- **Your Giving Day Checklist**
- **Storytelling Strategies**
- **Post-Giving Day Tasks**
  - **Next Steps, Q&A**

# Giving Day Prep Checklist

- Are you verified to collect donations?
- Do you have a plan for cash/check gifts?
- Is your profile complete?
- Have you considered securing a match?
- Do you know your ambassadors?
- Are your communications planned out?

# Are you able to accept 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

# Will you have cash or check gifts?

- Add cash and check donations to your 518 Day totals
- See “Donation Tools” on your admin dashboard below your checklist
- Attribute to a support area or fundraiser
- Receipts can be sent to donors when an email address is included

## Donation Tools



Add Offline Donation



Manage Sponsor Matching

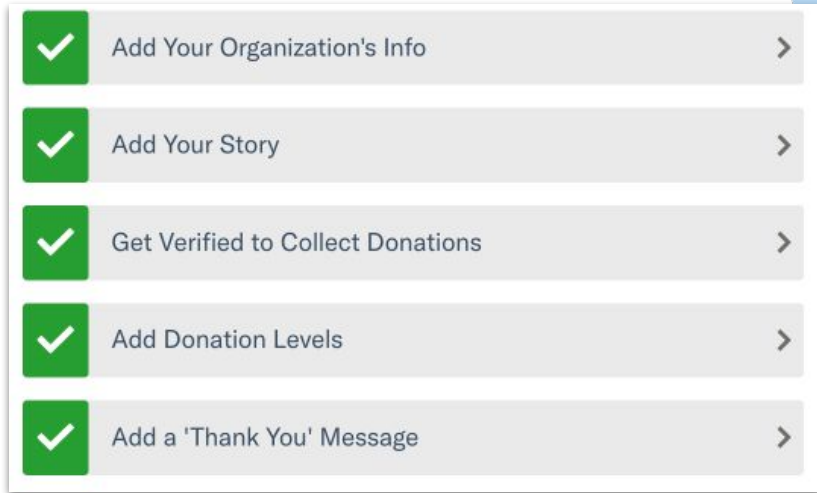


Manage Donations



Embed a Donate Button

# Profile Completion



Have you:

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

# Formatting Your Story

Tell Your Story



- **Change Font Typeface**
- **Header Text Formatting**
- **Text Color & Size**
- **Paragraph Text Formatting**
- **Content Alignment**
- **Add Bulleted or Numbered Lists**
- **Upload Images**
- **Add Hyperlinks**
- **Insert Tables**
- **Insert Horizontal Lines**
- **View in Fullscreen**
- **Edit in HTML**
- **Undo/Redo last action**
- **Click to see more/hide more**



# “Donation Levels”

Help donors understand the impact of their gift by suggesting a donation amount!

1. Identify 3 - 4 amounts
2. Determine what each amount supports
  - a. **Pro Tip:** Connect to your story
3. Add an image & caption



\$25

Purchases 10 Books



\$50

Sponsors one membership in a computer literacy course



\$100

Purchases 5 new keyboards for community computer use

# Setting Your Goals

## Determine 1-3 specific goals to focus on during 518 Day

- Group these by internal and external goals
  - **Internal examples:** Become more familiar with online fundraising tools, strengthen relationships with board members
  - **External examples (add to your profile & marketing!):** Raise \$5,000 for new supplies, secure at least \$1,000 in matching funds prior to the day, receive gifts from 15 new donors
- **Pro Tip:** Watch the [Goal Setting Strategies video](#)




# How does your profile look?

- [Albany Damien Center](#)
- [Friends of Hudson Youth](#)
- [Food Pantries for the Capital District](#)
- [CanCode Communities](#)

CanCode Communities

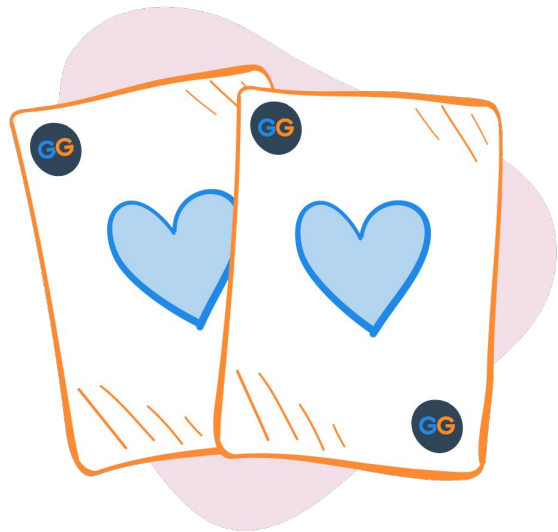
**DONATE**

\$0 Raised **\$2,500** Goal 0 Donors

 <p><b>\$50</b></p> <p><i>For just \$50, you can help fund internet hotspot access.</i></p>	 <p><b>\$100</b></p> <p><i>For \$100, you can help fund a laptop for a student that doesn't have one.</i></p>	 <p><b>\$300</b></p> <p><i>For \$300, you can support the cost of a child attending a tech summer camp.</i></p>
--	--	--

**CHOOSE YOUR OWN AMOUNT**

# Have you secured a match yet?



- **Why?**
  - Organizations who use Matches on average **raise 3.5x's more** than organizations who do not!
- It's a strategic component to your giving day
- Relationship-building opportunities year-round
- Don't worry, there's still plenty of time to ask!
- **Pro Tip:** Watch the Matches & Challenges training

# Your Quick Matching Plan

- ✓ Identify sponsors or a pool of donors to ask (Board members? Returning donors?)
- ✓ Secure commitment
- ✓ Add the live Match or Challenge to your 518 Day profile
- ✓ Curate communications to highlight your match
- ✓ Re-engage with the sponsor year round to make next year's ask a cinch!

# Do you have ambassadors?

- **Expand your organization's reach** by asking individuals to share out your page
- **Anyone can make an impact** as an ambassador
- Onboarding is easy as 1-2-3!
  - Communicate your organization's goals
  - Create a simple, suggested timeline for communications
  - Provide them with your profile link to share
  - Share post-day updates and impact reports



# Do you have a communications plan?

- Plan your online communications ahead
  - Announcement/Save the Date
  - Campaign Countdown
  - General messaging, targeted messaging
- Pre-schedule messaging when you can!
- Customize the templates available in the Nonprofit Toolkit
  - [Communication Guide](#)



# How will you communicate?



- Utilize multiple online channels
  - Social Media
  - Email and direct mail communications
- **C.O.P.E.** *Create Once, Post Everywhere!*
- **Pro Tip:** Create QR codes for your profile



# 6-Weeks Out: Online Engagement To-Do's

1. Finalize your goals and stories for 518 Day - this is your foundation!
2. Determine which online platforms work best
3. Use your 518 Day profile link (**Finish your profile by April 19**, if not sooner!)
4. Develop a weekly communications plan leading up to the day
5. Divide tasks among your staff, volunteers, and fundraisers

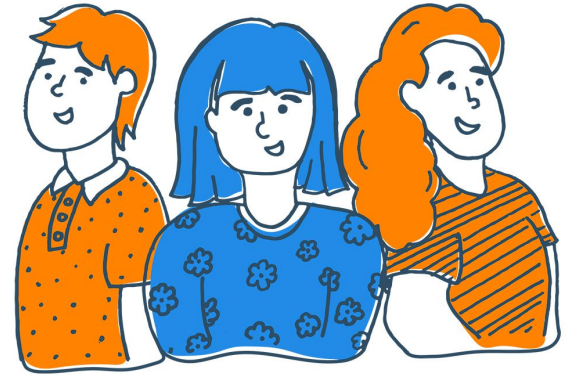
# Social Media Basics

- Beginner best practices
  - Use hashtags, and tag/mention individuals to encourage re-posting
  - Calls-to-action should include engagement (like, share, comment).
  - Include polls or voting opportunities
  - Be authentic - take the event seriously, but not yourselves too seriously. If you have fun with this event, it will show.
- Post regularly leading up to and on the Giving Day
- Post a variety of content around the event (not just Giving Day announcements or donation solicitations!)

# Incorporating Your Story

- Split up your story into smaller pieces to tell in installments leading up to 518 Day
  - Or, tell one short story each week over several weeks
- Use images and videos as much as possible to convey your point
- Remind your audience **when and where** they can support you during 518 Day. Dates and reminders are important! You can't do it enough.

# Storytelling Strategies



# Why do we tell stories?

## Stories help donors connect with your organization

- Provokes active listening and participation
- Lays the foundation of your organization's "big picture"
- Provides context and clear calls to action
- Empowers supporters to be a part of your story and mission
- Even more significant in the digital era!

# Curating Your 518 Day Story

## Who inspires your stories?

- Beneficiaries
- Volunteers
- Donors
- Staff
- Community Members

## Themes to Think About:

- Your Founding
- Your Focus
- Your Impact
- Your People
- Your Strengths
- Your Future

# Prompt Ideas

## **People Story: Told from the perspective of a current employee, volunteer, or supporter**

- How did you get involved with the organization?
- What impact did the organization have on you?
- What impact does your work with the organization have on the larger community?

# Prompt Ideas

## **Focus Story: Not a mission statement, but a story built around your mission**

- What services do you provide (who is being helped)?
- How are services delivered (how do you help them)?
- What are the outcomes of these services?





# Prompt Ideas

## **Impact Story: Before-and-after tales of beneficiaries who have felt the direct impact of your organization's mission**

- Tell us about your life before you worked with our organization
- What led you to reach out to our organization?
- How was our organization able to help you?
- Do you remember individuals you worked with or programs in which you participated? Tell us about them.
- What does your life look like after working with us? What are you looking forward to in your future?

# Storytelling Content to Collect

## Images

- 5-10 Photos of your mission in action
- Stock photos

## Videos

- Host on YouTube or Vimeo for easy sharing
- Thank You Video
- Live stream plans

## Infographics

- Highlight donor impact & data
- Testimonials



# Post-Event Stewardship



# How will you get your donations?



- Donations will be transferred on a 5-7 business day rolling basis
- Deposits will appear on your account from “Bonterra” or “Stripe”
- Reference your Financials report to reconcile deposits!

# Finding Your Donor Data

**GiveGab** Home Support Submit an Idea | Laryssa

**United Way of the Greater Capital Region**

Home  
Giving Days  
**Reports**  
Donations  
Financials  
Manage Organization

## Donations


**Search by donor name or email:**  
Search name or email

**Filter by Giving Day or Site:** All Giving Days & Community Giving Sit  
**Filter by Campaign:** All Campaigns  
**Filter by Donation Type:** Any Donation Type

Start Date Select start date End Date Select end date

Actions	Donation ID	Date	Donor	Intended Donation	Amount Charged	Bank Fees	Platform Fe
\$ +	51956						
\$ +	43587						

# Filtering Your Data



**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](#)



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


📅 Start [x] 📅 End [x]


Actions	Donation ID	Date ▾	Donor ▾	Intended Donati
📄 ✎ +	6554	11/22/2021 12:42PM	katrina grein katrina@givegab.com	\$100.00

# Exporting Your Donor 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

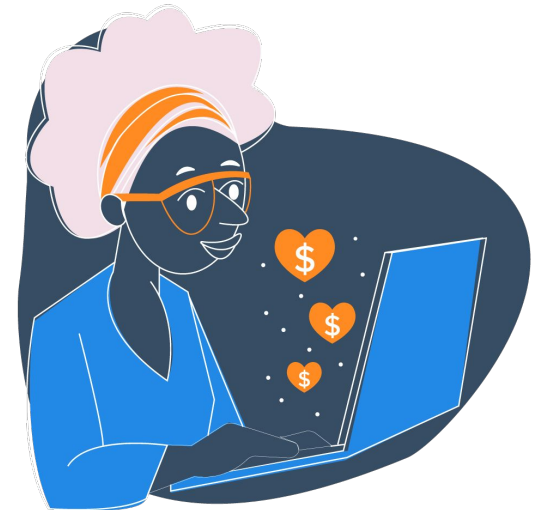
  Page 2 of 2

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

Viewing Dashboard for **Pawnee Public Library** 

# How will you thank your donors?

- Start **during and right after** the day
- Treat your donors like your heroes
- Talk about their tangible impact, **what you are able to achieve as a result**
- Returning? Review your donor data & compare it to previous years
- **Pro Tip:** Watch the [available training](#) on Donor Stewardship!





# How will you thank your donors?



1. Prepare general messaging, *even those who might not have participated!*
  - a. Success or impact update(s)
  - b. Thank You email
2. Follow up with individuals
  - a. Access their info in your dashboard, keep an eye out for anonymity!
3. Highlight impact with updates year-round
  - a. What did these donors do for your organization as a result?
  - b. This can wait until a few weeks after

# 'Thank You' Resources

- Customizable Email Templates and Guides for stewardship
- Sample Social Media Posts and Best Practices
- 518 Day Downloadable Graphics
- Resources for Board Members and P2P Fundraisers
- Blog Articles and How-To Videos from GiveGab



# Next Steps Q&A

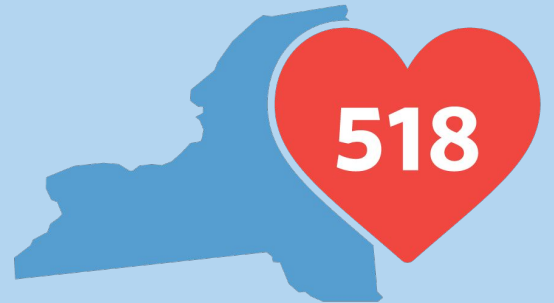


## Next Steps

- Complete your profile by April 19, *this includes being fully verified to collect donations!*
- Identify Ambassadors
- Identify Match Sponsors & make an ask!
- Complete your storytelling exercises
- Generate your marketing content

# Questions?

*May 18, 2024*



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