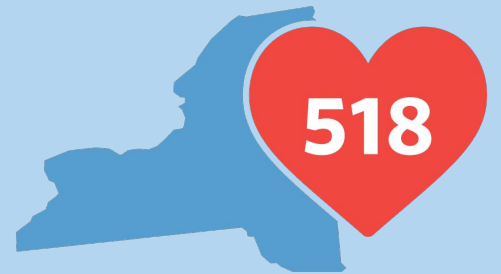


# Getting Ready for *518 Day of Giving*

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 March 15.**

# Agenda

- **518 Day & Bonterra Overview**
  - **How to Register**
    - **Creating Your Profile**
      - **Key Features**
        - **Next Steps, Q&A**

# 518 Day of Giving Overview

[www.518day.org](http://www.518day.org) | **May 18, 12AM - 12AM**

- IRS-recognized 501(c)3 nonprofits serving the Capital Region and the larger 518 area code are eligible to participate
- Every nonprofit conducts their own campaign
- Your marketing efforts + UWGCR efforts = Exponential visibility!
- Leaderboards, prizes & matching incentives increase friendly competition and gamification
- **Donations open early on May 4th.** Start sharing your profile link and reaching out to supporters!

# 518 Day Social Media



**Instagram:**

@518DayofGiving



**Facebook:**

<https://www.facebook.com/518Giving>

# Benefits of Participating



- Leverage digital fundraising tools to multiply your impact
- Take advantage of fundraising resources available year-round
- Re-engage with your existing supporters and gain new donors
- Utilize the Giving Day to reach other internal goals
- Motivate donors to make a greater impact with prizes and match incentives

# Who is Bonterra?



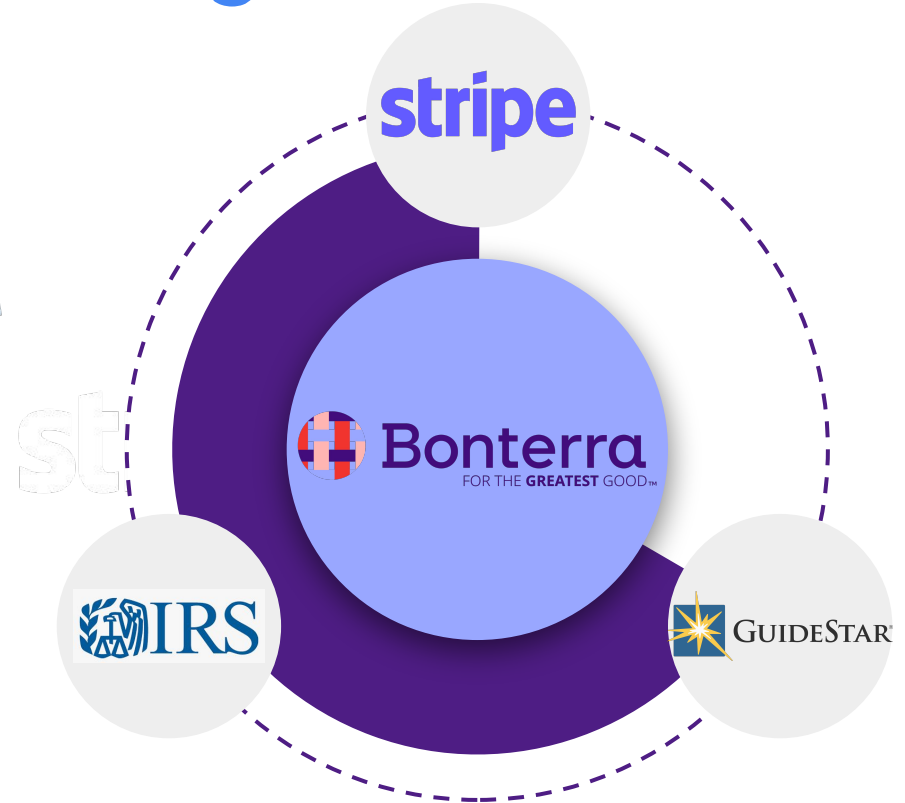
# Who is Bonterra (GiveGab)?

- Hosts a secure, reliable and transparent platform for 518 Day of Giving
- Creates the ultimate donor experience, strengthening your relationship with your supporters
- Provides a dedicated support team



# Payment Security

- Partnered with Stripe - PCI Level 1 Payment Processor for donation processing and payouts
- Direct deposits within 5-7 business days
- Donor credit card information is not revealed or saved with Bonterra
- All participating organizations verified as IRS and state-recognized nonprofits



# Donation Processing

- **Credit Card, ACH (“Plaid”), Mobile Pay**
- Transaction fees charged: donors can cover all fees on behalf of your organization
  - On average >75% of donors cover the fees on your behalf
- GiveGab’s chat support available within the donation form for your supporters!

Step 3 of 3

**YMCA of South Collier** Gift: \$50.00

---

**Email:** laryssa@givegab.com

**Fees:** \$3.13

What's with these fees?

I'll cover the fees!

Privacy Option(s)

Please do not display a name publicly.




Please do not display the donation amount publicly.

Hide my name from this organization and the public.

**Total:** **\$53.13**

[BACK](#) [SUBMIT](#)

Securely processed with:

 SSL  256 Bit Encryption  reCAPTCHA

[Google Privacy Policy](#) and [Terms of Service](#) apply.  
Learn more about how your information is used following a donation: [Privacy Policy](#).

# Transaction Fees

## Credit Card:

3.5% Bonterra Fee

+

2.5% + \$0.30 Stripe Fee

=

**6% + \$0.30**

## ACH:

3.5% Bonterra Fee

+

\$3.00 flat bank fee

=

**3.5% + \$3.00**

*\*\$100 minimum*



Thank you for making a difference in our community!

Step 1 of 3

Choose an amount to give:

\$

[Check for additional Fundraising Campaigns \(optional\)](#)

[Add a fundraiser](#)



Greater Pawnee German  
Shepherd Rescue

Name to Display (Optional):

(Defaults to First and Last Name)

- I am a new donor to this organization.
- Make this a recurring gift.
- Make this donation in honor of or in memory of someone.

[Add a public message to this donation](#)

REMOVE THIS DONATION

+ ADD ANOTHER ORGANIZATION



The Gift Basket makes it easy for donors to support multiple causes at once!

# Instant Donor Delight

- Kickstart your stewardship efforts
- Sends an immediate 'Thank You' email from your organization, also their receipt
- Includes your organization's EIN and donation amount
- You can resend that receipt any time to a donor!

## DAY OF GIVING

Nickie,

Thank you so much for your contribution to our Giving Day! Your donation will help improve our community and the lives of hundreds of individuals throughout our area.

Thank you again!



You are PAW-sitively amazing! Thank you for your generous gift to Logan's Pups. We could not help dozens of dogs every day without you.

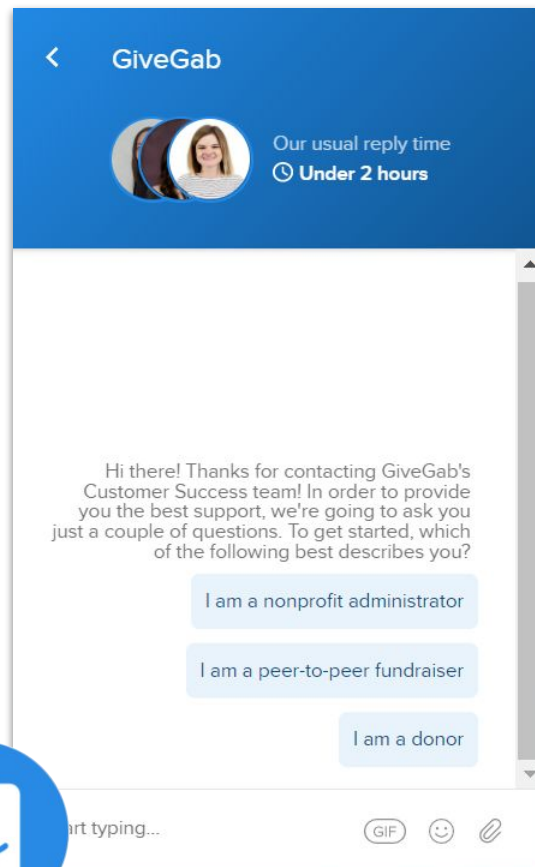
### Your donation receipt from Logan's Pups

Donor: Nickie Fredenburg  
Date: February 27, 2020  
Organization: Logan's Pups  
EIN: 12-1234567  
Designation: Giving Day  
Amount: \$10.00

[View Your Donations](#)

# How We Support You

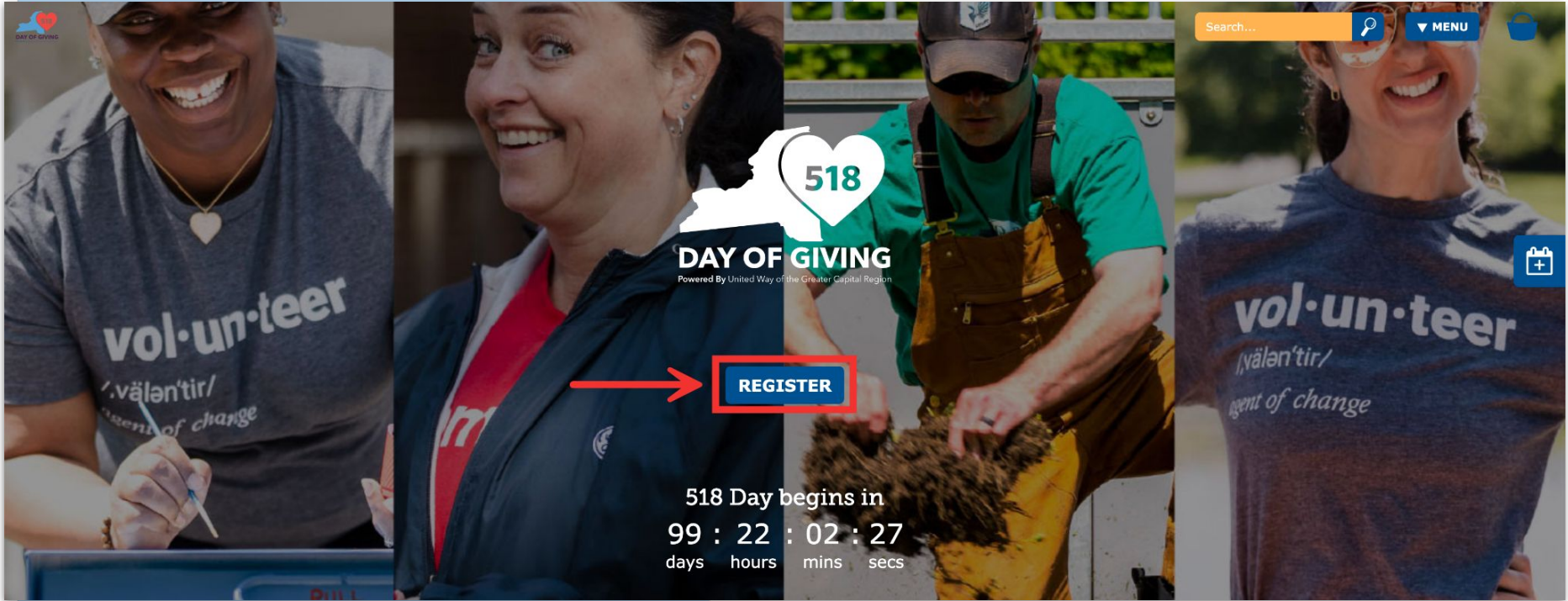
- Visit Our Help Center
  - [support.givegab.com](https://support.givegab.com)
- Check Out Our Blog
  - [givegab.com/blog](https://givegab.com/blog)
- Send us an Email
  - [CustomerSuccess@givegab.com](mailto:CustomerSuccess@givegab.com)
- Chat with GiveGab's Customer Success Team
  - Look for the little blue chat bubble



# Registering for 518 Day of Giving

[Click here](#) for detailed written  
instructions





vol-un-teen  
välän'tir/  
agent of change

518  
DAY OF GIVING  
Powered By United Way of the Greater Capital Region


REGISTER

518 Day begins in  
99 : 22 : 02 : 27  
days hours mins secs

Search... MENU

vol-un-teen  
välän'tir/  
agent of change



GiveGab is becoming  Bonterra.





## Find Your Organization

and participate in 518 Day

3 Results

**Senior Services of Albany**  
Albany, New York

[PARTICIPATE](#)

**Capital District Women's  
Employment & Resource  
Center**  
Albany, New York

[PARTICIPATE](#)

**Northeast Ballet Company**  
SCHENECTADY, NY

[Inquire](#) about registering this organization. It's easy!

### Don't see your organization listed?

You can create an organization by clicking the button below.

[ADD MY ORGANIZATION](#)



## 518 Day of Giving

Organization Name \* required

Street Address Line 1 \* required

Street Address Line 2

City \* required

State \* required

ZIP/Postal Code \* required

Not located in the United States?

Logo



Select Image

Remove

Image should be 5MB max and a JPG, JPEG or PNG file type. Recommended dimensions: 300x300

Click 'Continue' to complete your registration for

## 518 Day of Giving



Continue



## 518 Day of Giving

Welcome to 518 Day of Giving, the Capital Region's first online, regional fundraiser on May 18, 2024! Please read the [Nonprofit Partnership Agreement](#) prior to completing your registration.

### Registration Type

Giving Day Registration \$50.00

[Do you have a coupon code?](#)

**1. I am an official of the 501(c)3 organization described below and agree to the Nonprofit Partnership Agreement for 518 Day of Giving. \*required**

Please select one choice.

**2. What was your 2023 annual operating budget? \*required**

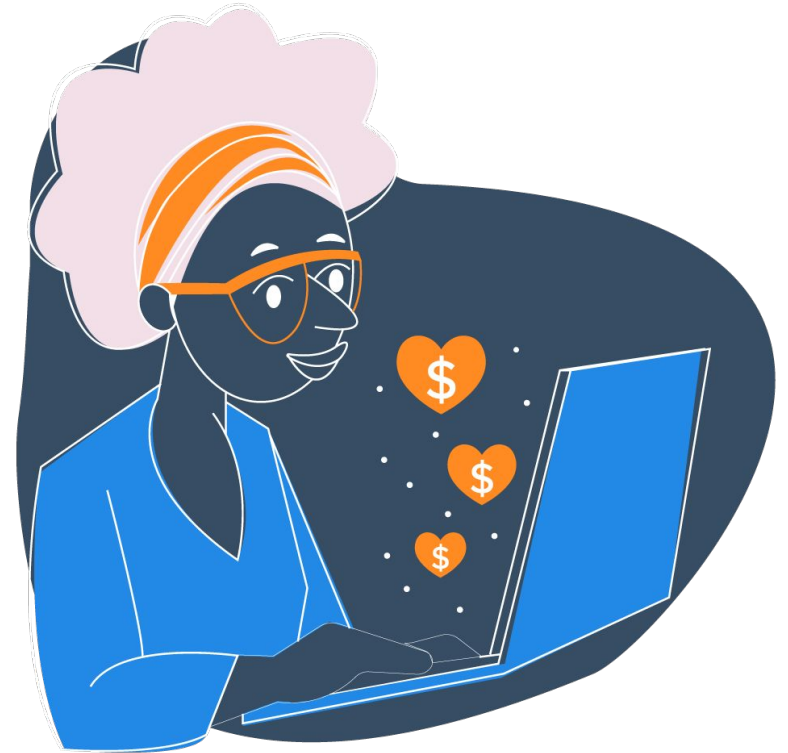
Please select one choice.

**3. Please indicate which county or counties in the 518 area your organization serves. (check all that apply) \*required**

Please select all that apply.

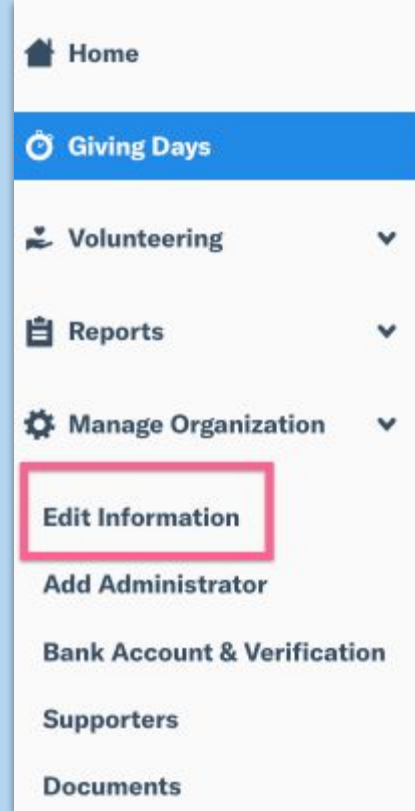
- Albany
- Clinton
- Columbia
- Dutchess
- Essex
- Franklin
- Fulton
- Greene

# Completing Your Profile



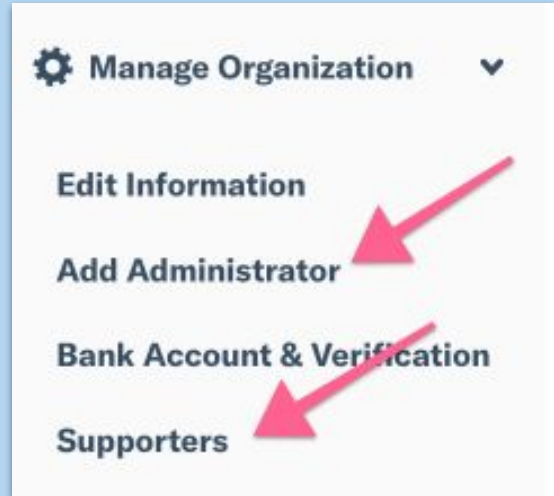
# Returning? Update Info

- Review your organization's contact information and settings
- **These do not change year-over-year unless you update them.**
- [Here's how to update or view](#) who is listed as your contact



# Returning? Update Admins

- Toggle the “supporters” tab to see who has a blue key next to their name
- **Add, Remove, or Edit current administrators**
- Grant full admin access, or simply “profile editing access”
- **Pro Tip:** Complete immediately upon registering!



# Your Giving Day Dashboard



## 518 Day of Giving

\$0.00 Raised • 0 Donors • 0 Gifts

Analytics

### Get Set Up

Complete the steps below to be sure that you are set up and ready to participate in 518 Day of Giving.

70 Days to Launch

Participation Approval Status

Approved

Congratulations, your application has been APPROVED! Don't forget to visit the Nonprofit Toolkit Center to prepare for a successful giving day campaign. Questions? Contact us at [518Day@unitedwaygcr.org](mailto:518Day@unitedwaygcr.org). Happy Fundraising!

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

# Basic Info

- Logo
- Causes

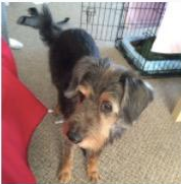
- ***Did you know?***

*Selecting appropriate causes will help you appear in the Cause Search for donors*

✓ Add Your Organization's Info

Website

Logo



Select Image Remove

Causes (optional)

Cause #1 Animals

Cause #2

Cause #3

Image should be 5MB max and a JPG, JPEG or PNG file type.  
Recommended dimensions: 300x300.

Save



# What's Your Story?

Why are you participating, and what will these funds do?

- ❑ Add a cover photo
- ❑ Set a monetary goal
- ❑ Share your campaign story through words and visuals

✓ Add Your Story

**Cover Photo**




Image should be 5MB max and a JPG, JPEG or PNG file type.  
Recommended dimensions: 1500x500.

**Set a Goal**

Display Goal on Profile

\$ 10000 .00

**Tell Your Story**

GT America Formatting A B I U ✨ ☰ ☷ ☹

### Furrever Friends

In 2015, Alyssa had just settled into a new job in a new city and was finally ready to adopt the four legged friend she had always wanted. She wasn't sure what to expect on her first visit to the shelter, but her life forever changed when she met Logan. Alyssa looked into the eyes of the 10 year old mutt and her heart broke thinking that just because he wasn't a puppy, he wouldn't be able to find a loving home. Alyssa changed all that when she adopted Logan, promising to make his last years the best ones yet.

### Changed For The Better

Alyssa and Logan were the perfect pair, despite some of the health problems that come with being an older dog. He brought out the best in her and she did the same for him, until after only a year together, Logan passed away. Even though Alyssa didn't get to spend as much time with Logan as she would have liked, their time together changed Alyssa forever.

**Note:** Pasting text from outside of GiveGab into this text editor can cause inconsistent styling on your public-facing profile. If you are inserting copied text, please **highlight all** inputted text and select the "Clear Formatting" wand icon before reaching out to support.

**Video Url**

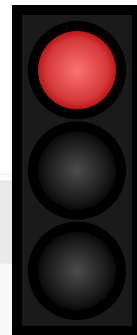
Vimeo links must be in the following format: <https://vimeo.com/123456>.

# Get Verified!

- ❑ State Attestation Compliance
- ❑ Basic Business Details
- ❑ Banking Details (checking account!)
- ❑ Organization Representative Information (DOB + SSN)

This is separate from your “application” process to participate.

**Pro Tip:** Don't wait to complete this information. It can take several days, sometimes more.



## Get Verified to Collect Donations

### Status: **Incomplete**

Please provide your organization's information and verify you can collect donations in your state [here](#).

[Confirm State Fundraising Compliance](#)

[Add Bank Info](#)



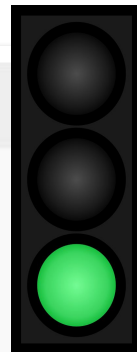
## Get Verified to Collect Donations

### Status: **Verified**

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

✓ Confirmed state fundraising compliance


✓ Bank account and organization information verified




# Suggest Donation Levels

✓ Add Donation Levels


We recommend having 3 or 4 donation levels.




**\$25.00**  
Provides one week of food for a senior pup  
[Edit](#) [Remove](#)



**\$50.00**  
Provides a super soft bed for a loving senior pup  
[Edit](#) [Remove](#)



**\$100.00**  
Helps a family foster one of our amazing senior pups  
[Edit](#) [Remove](#)



**\$500.00**  
Provides life changing surgery to a senior pup in need  
[Edit](#) [Remove](#)

Add Donation Level

- Custom amounts
  - *Using custom amounts to represent your organization, like a tangible good or service, further connects the donor to your goal*
- Unique descriptions
- Optional photos
- Unlimited Levels
- **Pro Tip:** Create no more than 5

# Personalized Gratitude

- Add your own message
- Include a photo or video
- Donors can reply to that email directly
  - [Here's how to update or view](#) who is listed as your contact
- **Pro Tip:** Record a quick, candid Thank You video on your phone. Delight your donors!

✓ Add a 'Thank You' Message

Please provide a "thank you" message, as well as an image or video link!


**Thank You Message**

Thank you so much for your donation to Logan's pups! With your support, we're able to continue our love and care of senior dogs.

Your donation goes beyond this one organization's mission, as your support celebrates the philanthropic spirit and unity of our community.

**Youtube or Vimeo Link**

Don't have a video to link to? No biggie! Upload an image, and we'll use that instead.



Select Image Remove

Image should be 5MB max and a JPG, JPEG or PNG file type.  
Recommended dimensions: 800x600.

Save

# Key Features



# Add Offline Donations

When donations open in May, an **“Add Offline Donation”** button will appear.

For cash, check, additional gifts.

**Must be added before donations end on May 20 at 11:59PM.**


## Donation Tools

 Manage Matches and Challenges


 Manage Donations

 Embed a Donate Button

## Get Prepared


 Webinars and Workshops

 Giving Day Toolkit


 Help Center

## Other Actions

 Engagement Opportunities

 Add External Fund

 View Registration Info

 View Your Profile

 Mobilize Integration

## Share Your Page

<https://www.518day.org/organizations/the-foundation-of-st-mary-s-healthc>



# Add a Button to Your Website

*Embed a Giving Day button right on your organization's own website.*

*That way any donations outside of the platform can be captured!*


## Donation Tools

 Manage Matches and Challenges


 Manage Donations

 Embed a Donate Button 

## Get Prepared


 Webinars and Workshops

 Giving Day Toolkit


 Help Center

## Other Actions

 Engagement Opportunities

 Add External Fund

 View Registration Info

 View Your Profile

 Mobilize Integration

## Share Your Page

<https://www.518day.org/organizations/the-foundation-of-st-mary-s-healthc>




# Feature Matching Gifts

*Have a sponsor or donor(s) who have pledged a matching gift?*

**Create a live matching gift right on your profile!**


## Donation Tools

 Manage Matches and Challenges 

 Manage Donations

 Embed a Donate Button


## Get Prepared


 Webinars and Workshops

 Giving Day Toolkit

 Help Center

## Other Actions

 Engagement Opportunities

 Add External Fund

 View Registration Info

 View Your Profile

 Mobilize Integration

## Share Your Page

<https://www.518day.org/organizations/the-foundation-of-st-mary-s-healthc>





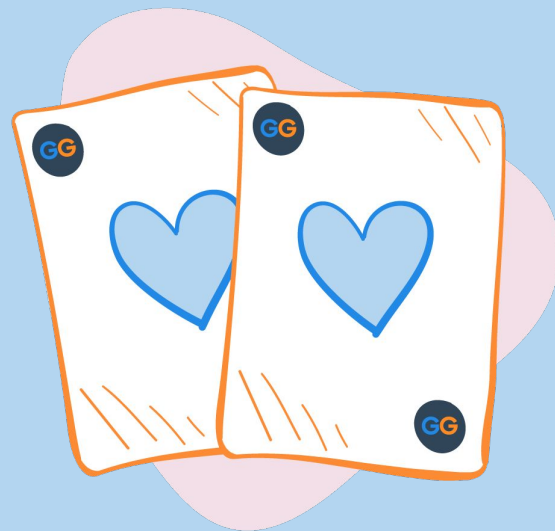
# What's a Matching Gift?

- Use pledged donations as a donor incentive to increase impact!
- Donors can see their doubled impact immediately
- Begin thinking about your ask for matching gifts.
  - Larger planned donors? Pool donations from your board? Reach out to a local business who aligns with your mission?

# Live Matching Gifts

Utilizing our live matching tool will allow your totals to display **in real time** the impact of those matching gifts.

- 1:1 Dollar-for-Dollar **Match** (even 2:1, and 3:1 ratios!)
- Donor or Dollar **Challenge** (set a goal you must meet for all funds to be released)
- **Pro Tip:** Watch the [Matching Training Video](#)



# Did you know?



Organizations on GiveGab (Bonterra) who have matches typically raise **4x more** than organizations who do not use this feature.


# Share Your Profile

- Preview your profile along the way
- Share this link with your supporters
- Post directly to Twitter and Facebook from your dashboard

## Other Actions

 Engagement Opportunities

 Add External Fund

 Manage Support Areas

 View Registration Info

 View Your Profile

## Share Your Page

<https://giving-days-preprod.herokuapp.com/organizations/>




# Actionable Reporting









- Detailed donation reports available in real time
- Advanced Analytics
- Year-over-year reporting for the next Giving Day


# What do donors provide?

- Contact Information
- If the donor is 'new' to your organization
- Their chosen display settings
- Donors have the option to be completely anonymous to your organization
- You can resend their receipt at any time throughout the year!

## Donations

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

Actions	Donation ID	Date	Donor	Intended Donation	Amount Charged
   	6170665	2/8/2023 8:44AM	John Donor	\$250.00	\$250.00
   	6170662	2/8/2023 8:44AM	Laryssa Test	\$5,000.00	\$5,000.00

 Export CSV    [Edit Bank Account Info](#)

# Giving Day Analytics



The screenshot shows the 518 Day of Giving dashboard. At the top left is the 518 logo with a heart and the text 'DAY OF GIVING'. To the right, it says '518 Day of Giving' in large blue text, followed by '\$0.00 Raised • 0 Donors • 0 Gifts'. Below this is a dark blue button labeled 'Analytics' with a red arrow pointing to it from the right. Underneath the button is the heading 'Get Set Up' and a paragraph: 'Complete the steps below to be sure that you are set up and ready to participate in 518 Day of Giving.'

- Donor counts (online, offline, total)
  - “Unique donors”
- Donation counts (online, offline, total)
- Average donation size
- Average donations per donor
- New donors
- Fee coverage
- Year-Over-Year comparisons

# Financial Reports

- An entire view dedicated to your accounting efforts
- Easily reconcile your gift reports against deposits to your account

<b>Balances</b>	<b>Balances</b>	<b>Start Date</b>	<b>End Date</b>
Payouts		Select Start Date	Select End Date
Refunds			
	<b>Donation Transactions</b>		
	Gross Amount: ⓘ		\$0.00
	Net Amount: ⓘ		\$0.00
	Total Number: ⓘ		0
	Givegab Platform Fees: ⓘ		\$0.00
	Processing Fees: ⓘ		\$0.00
	<b>Current</b>		
	Total balance: ⓘ		\$0.00
	Pending refunds:		\$0.00
	Pending disputes: ⓘ		\$0.00
	Total in reserve: ⓘ		\$0.00
	Total balance to payout: ⓘ		\$0.00



# What's Next?



# Let's Reflect!



Take a breath!

- If this is your first time participating, enjoy it!
- Your role as a nonprofit admin can seem overwhelming
- You don't need to compete for incentives and prizes
- 518 Day may not be the right fit for all of your donors - that's okay!

# Your Nonprofit Toolkit

**The Nonprofit Toolkit has valuable resources for all your 518 Day needs.**

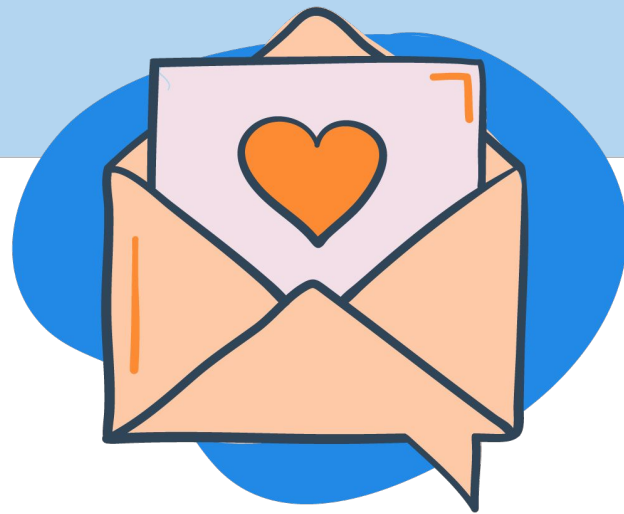
- Templates
- Downloadable graphics
- Resources for board members, volunteers, staff and fundraisers
- Training videos for fundraising strategies!



# Your Next Steps

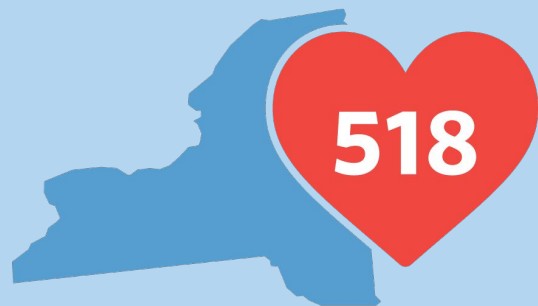
## What to work on this month:

- Complete your profile & get verified
- Follow 518 Day of Giving and use the **#518DayofGiving** hashtag
- Watch your inbox for important emails
- Meet internally to discuss goals, and come up with a marketing game plan
- Find resources in the toolkit - don't reinvent the wheel!
  - **Pro Tip:** check out the communications plan!



# Questions?

*May 18, 2024*



**DAY OF GIVING**

Powered By United Way of the Greater Capital Region