Submit Your Questions!

This is being recorded. The recording will be available on the /trainings page by **November 17**.

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

Introduce yourself! Name, location, organization.
Agenda

- Cattaraugus Gives Updates & Reminders
- Your Checklist for Success
- After Cattaraugus Gives
- Next Steps
- Q&A
Cattaraugus Gives Updates and Reminders

- [www.cattaraugusgives.org](http://www.cattaraugusgives.org) | November 28, 2023
- Donations open November 28 @ 12 AM - December 1 @ 11:59 PM
- Prizes
- Social Media Feed - use #CattaraugusGives
Your Success Checklist

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

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GiveGab is becoming Bonterra.
Is Your Profile Complete?
Will You Have Cash/Check Donations?

- Add cash and check donations to your Cattaraugus Gives 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
Have You Secured a Matching Gift?

- **Why?**
  - Organizations with matching funds raise 4.5x more on average than organizations without a match.

- **Strategize**
  - Set up your match in a way that draws donor attention.
  - Credit the sponsors to cross-promote.

- There's still plenty of time to start this year!
- First time? Keep it simple.
- **Pro Tip:** Watch the Matches & Challenges training.
Your Matching To-Do List

- Identify sponsors to ask
- Secure commitment
- Add Matches and Challenges to your Cattaraugus Gives profile
- Verify your match setup with chat 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 host their very own fundraising page (Peer-to-Peer)
- Anyone can be a fundraiser
- Pro Tip: Watch the Peer-to-Peer Fundraiser training video
Setting Up Your Fundraisers For Success

- Set up a quick info session for Ambassadors and Peer-to-Peer Fundraisers
- Walk them through the Cattaraugus Gives 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
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 Cattaraugus Gives 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
Post-Cattaraugus Gives Success
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 “Bonterratech”.
- Reference your Financials report to reconcile deposits!
Finding Your Donor Data

Admin Dashboard

Recent Donations

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

View All Donations
Filtering Your Data

Donations

Search by name or email

- All Giving Days & Community Giving
- All Campaigns
- Any Donation Type

Actions | Donation ID | Date | Donor | Intended Donation
---|---|---|---|---
| 6554 | 11/22/2021 12:42PM | katrina grein | katrina@givegab.com | $100.00
## Exporting Your Donor Data

<table>
<thead>
<tr>
<th>ID</th>
<th>Date</th>
<th>Time</th>
<th>Name</th>
<th>Email</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>5467</td>
<td>2/10/2021</td>
<td>10:40AM</td>
<td>Laryssa Habert</td>
<td><a href="mailto:laryssa.habert@givegab.com">laryssa.habert@givegab.com</a></td>
<td>$5.00</td>
</tr>
<tr>
<td>5439</td>
<td>2/2/2021</td>
<td>2:23PM</td>
<td>Jonathan Nay</td>
<td><a href="mailto:jon.nay1@givegab.com">jon.nay1@givegab.com</a></td>
<td>$25.00</td>
</tr>
<tr>
<td>5438</td>
<td>2/2/2021</td>
<td>2:21PM</td>
<td>Jonathan Nay</td>
<td><a href="mailto:jon.nay1@givegab.com">jon.nay1@givegab.com</a></td>
<td>$25.00</td>
</tr>
</tbody>
</table>

- Export CSV
- Edit Bank Account Info

**Viewing Dashboard for Pawnee Public Library**
Reconciliation

- The Financials reporting dashboard allows you to view your balance and donations from an accounting perspective.
- Match each online gift to a deposit.
How Will You Thank 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, compare it to previous years
- Watch the available training on Donor Stewardship!
How Will You Thank Your Donors?

- Pre-schedule general messaging to all supporters
  - Social media posts and overall success update
  - Thank You email to your organization’s email list

- Follow up with individual donors
  - Access their contact information in your Giving Day 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 Guides for stewardship
- Sample Social Media Posts and Best Practices
- Cattaraugus Gives Downloadable Graphics
- Resources for Board Members and P2P Fundraisers
- How-To Videos on the Cattaraugus Gives Trainings page
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
Final Checklist

- Complete your profile by November 20
- Ensure you are verified to collect donations
- Keep an eye out for important emails!
- Follow Cattaraugus Region Community Foundation on Social Media and use #CattaraugusGives Hashtag
- Watch on-demand training course videos
- Check out the Nonprofit Toolkit
How We Support You

Visit our Help Center

Check out Our Blog

Send us an email at CustomerSuccess@GiveGab.com

Chat with our Customer Success Team
Look for the little blue chat bubble
Questions?

November 28, 2023