

Final Steps to Success

June 1, 2023



GiveGab is becoming  Bonterra.

Submit Your Questions!

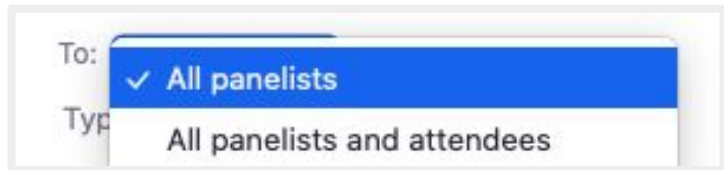
This is being recorded. The recording will be available on the /trainings page by **5/5/23.**

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

Introduce yourself! Name, location, Clubhouse.



Chat Box

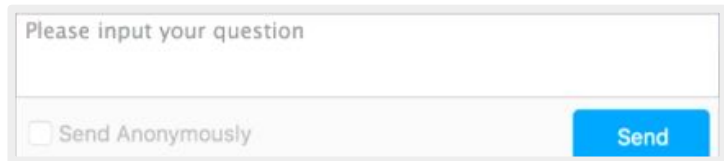


To: ✓ All panelists

Type: All panelists and attendees



Q&A



Please input your question

☐ Send Anonymously Send

Agenda



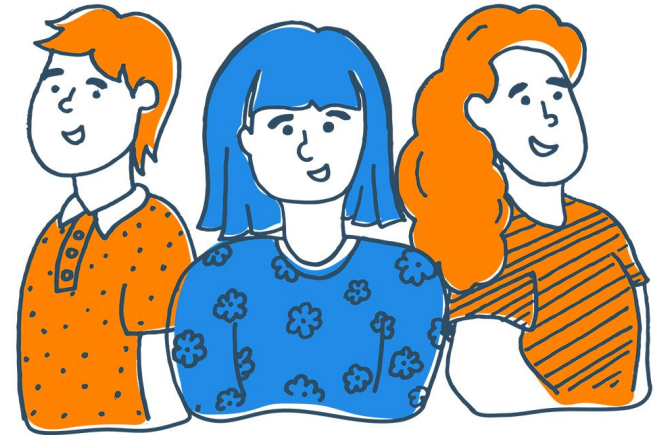
- **Clubhouse Giving Day Updates & Reminders**
- **What's New for 2023?**
 - **P2P Fundraisers**
 - **Your Checklist for Success**
 - **After Clubhouse Giving Day**
 - **Next Steps**
 - **Q&A**

Clubhouse Giving Day Updates and Reminders





- clubhousegivingday.org | June 1st
- Donations open **May 18th at 12AM**, donations close **June 8th at 11:59PM**
- Social Media Feed
#ClubhouseWorks

What's New for 2023?



Better Reconciliation

- 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

| | | | |
|--|--|--|--|
|  Logan's Pups | |  GG Pay Financials | |
| Balances | | GG Pay Logan's Pups | |
| Payouts | | Start Date | |
| Refunds | | End Date | |
| Donation Transactions | | | |
| Gross Amount: ⓘ | | \$4,275.00 | |
| Net Amount: ⓘ | | \$4,199.23 | |
| Total Number: ⓘ | | 33 | |
| Givegab Platform Fees: ⓘ | | \$136.88 | |
| GG Pay Processing Fees: ⓘ | | \$109.39 | |
| Current | | | |
| Total balance: ⓘ | | \$200.00 | |
| Pending refunds: | | \$0.00 | |
| Pending disputes: ⓘ | | \$0.00 | |
| Total in reserve: ⓘ | | \$0.00 | |
| Total balance to payout: ⓘ | | \$200.00 | |

Giving Day Analytics

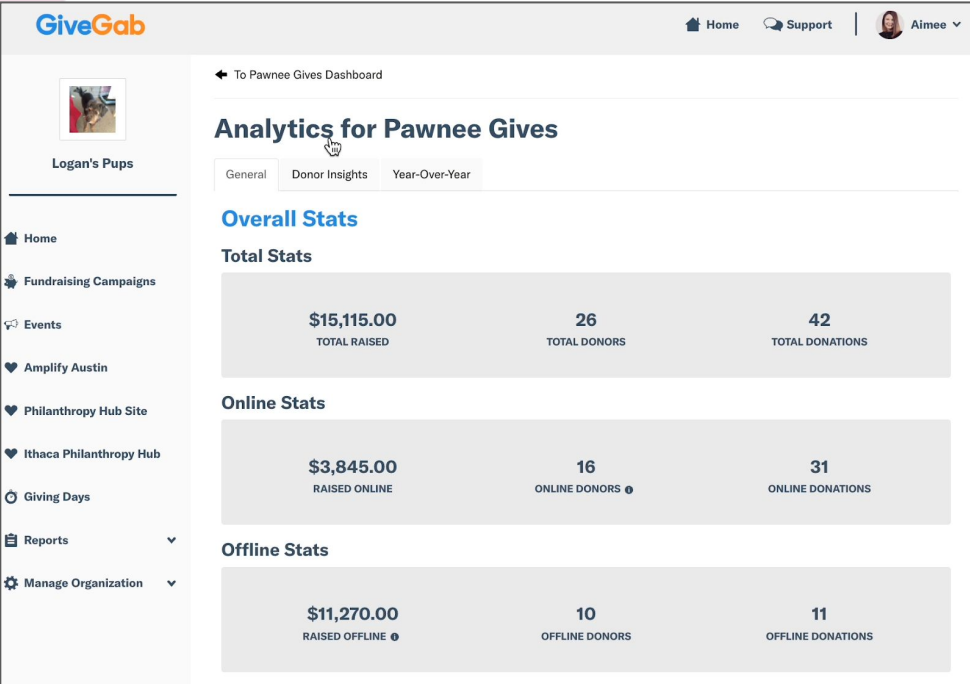
Key stats are available for the following data points:

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

 **Ithaca Gives** March 17, 2023
\$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 Ithaca Gives.

GiveGab Home Support Aimee ▾


Logan's Pups

[Home](#)
[Fundraising Campaigns](#)
[Events](#)
[Amplify Austin](#)
[Philanthropy Hub Site](#)
[Ithaca Philanthropy Hub](#)
[Giving Days](#)
[Reports](#) ▾
[Manage Organization](#) ▾

[To Pawnee Gives Dashboard](#)

Analytics for Pawnee Gives
General Donor Insights Year-Over-Year

Overall Stats

Total Stats

| | | |
|------------------------------------|---------------------------|------------------------------|
| \$15,115.00 TOTAL RAISED | 26 TOTAL DONORS | 42 TOTAL DONATIONS |
|------------------------------------|---------------------------|------------------------------|

Online Stats

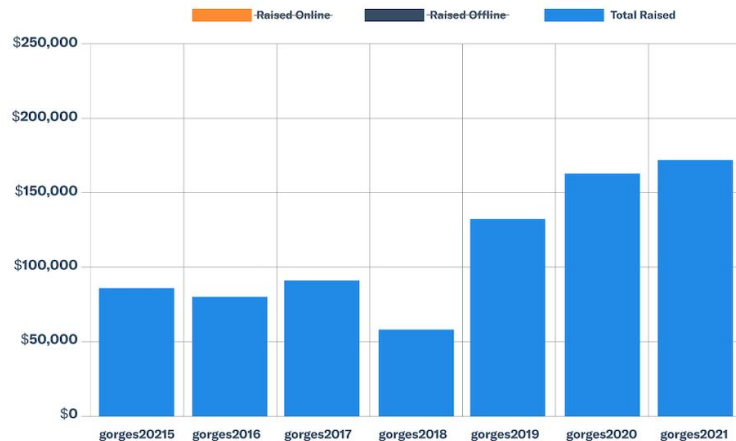
| | | |
|------------------------------------|----------------------------|-------------------------------|
| \$3,845.00 RAISED ONLINE | 16 ONLINE DONORS | 31 ONLINE DONATIONS |
|------------------------------------|----------------------------|-------------------------------|

Offline Stats

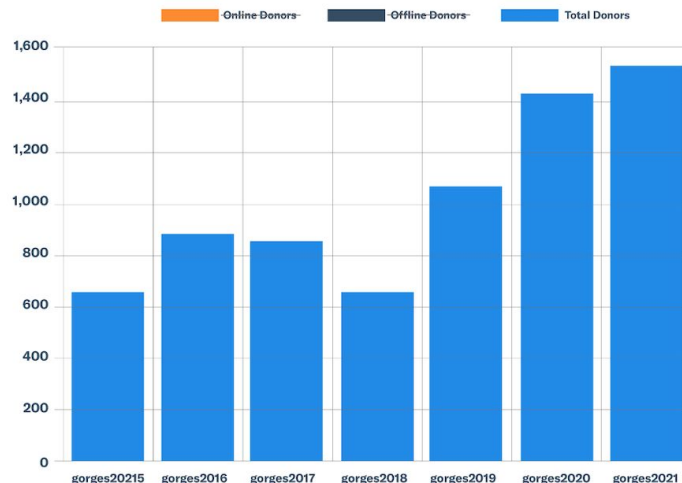
| | | |
|--------------------------------------|-----------------------------|--------------------------------|
| \$11,270.00 RAISED OFFLINE | 10 OFFLINE DONORS | 11 OFFLINE DONATIONS |
|--------------------------------------|-----------------------------|--------------------------------|

Year-over-Year Metrics

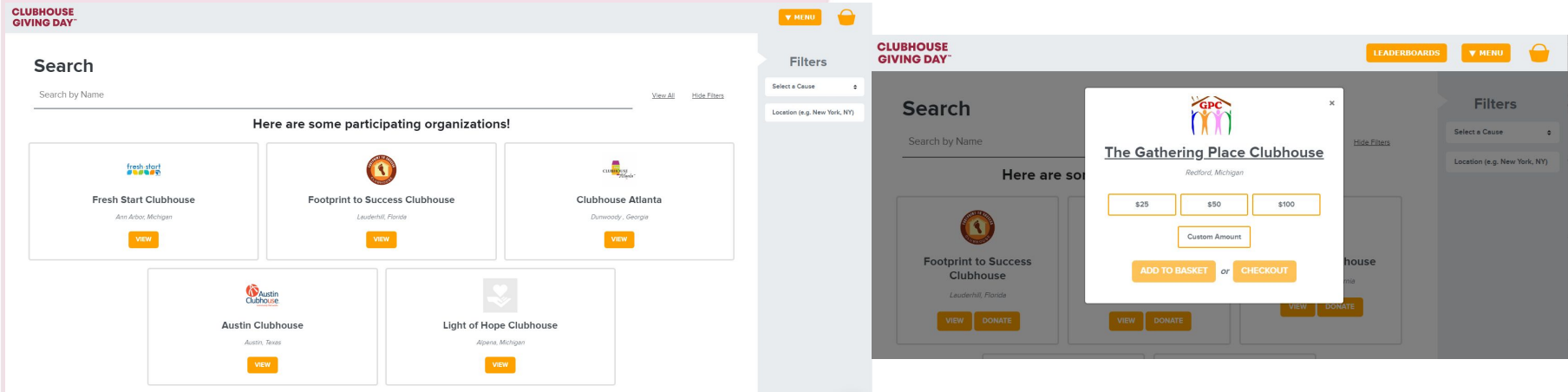
Dollars Raised



Donor Counts




New Search Page Design




Elevating Fundraisers

- Fundraisers are asked to provide their phone numbers (optional)
- More robust story editor
- Chosen P2P will appear in donor's receipt



Tell Your Story





Your Story Image

[Select Image](#) [Remove](#)
Image should be 5MB max and a JPG, JPEG or PNG file type.
Recommended dimensions: 1200x800.


Set A Goal
\$ 1000 ^ .00
Video Link (YouTube or Vimeo)

Your Phone Number

This will not be displayed publicly.

Tell Your Story

[GT America](#) [Formatting](#) **A** **B** *I* U    

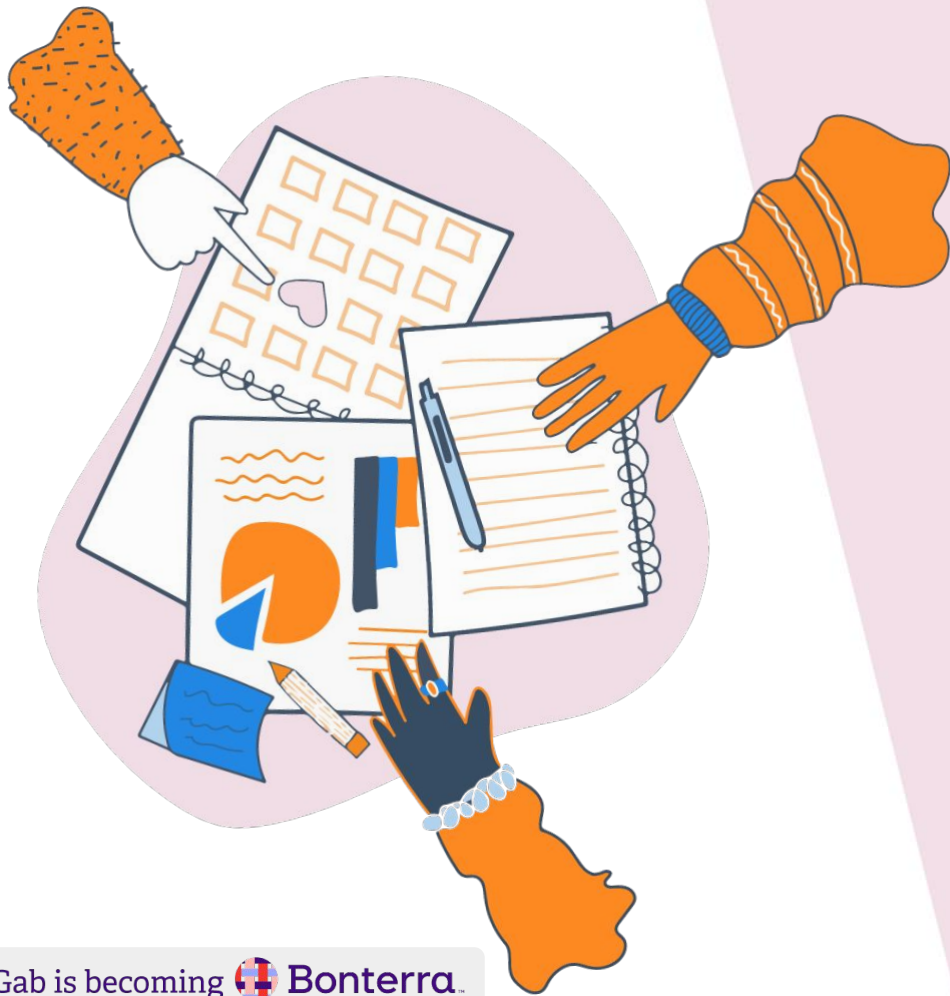


I am so proud to support the Greater Pawnee German Shepherd Rescue! I rescued my german shepherd, Toby, six years ago from this rescue and I cannot speak more highly of them. They provide such important services and have saved the lives of countless german shepherds.

Today, I am asking that you give back to my fundraiser during Pawnee Gives to support this incredible rescue in all that they do! Your gift, no matter the size, will make a tremendous difference. Thank you so much for supporting my fundraiser!

What is P2P Fundraising?

Peer-to-Peer Fundraising allows your most passionate supporters to create and host their own fundraising page right within your Clubhouse Giving Day profile. Their totals roll up into your totals!



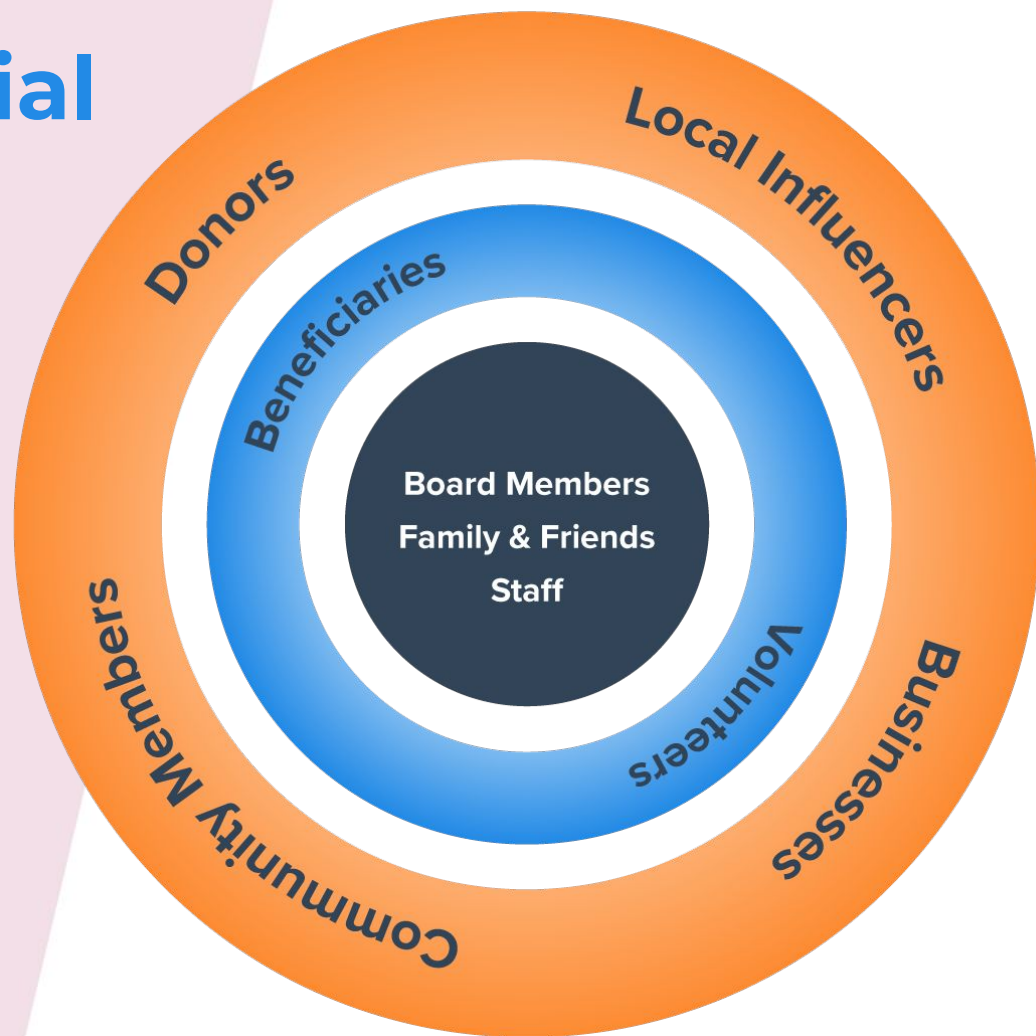
Strategize and Plan

4 Steps to 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



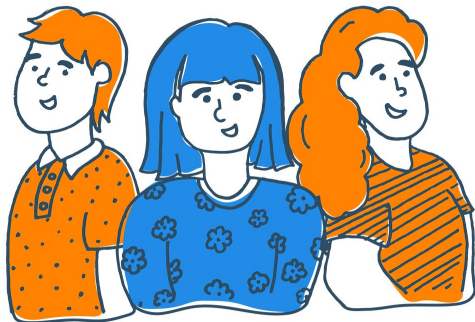
Identify Potential Fundraisers



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 relationship
- Ensure your fundraisers have a great experience regardless of how much they raise

Make It Fun!

- Create friendly competition
- Pair it with an event
- Provide templated graphics, communications and sample content ideas for sharing on social media
- Ask yourself, what experience would you want to have as a fundraiser?



Set 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

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

Will you have cash or check gifts?

- Add cash and check donations to your Clubhouse Giving 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

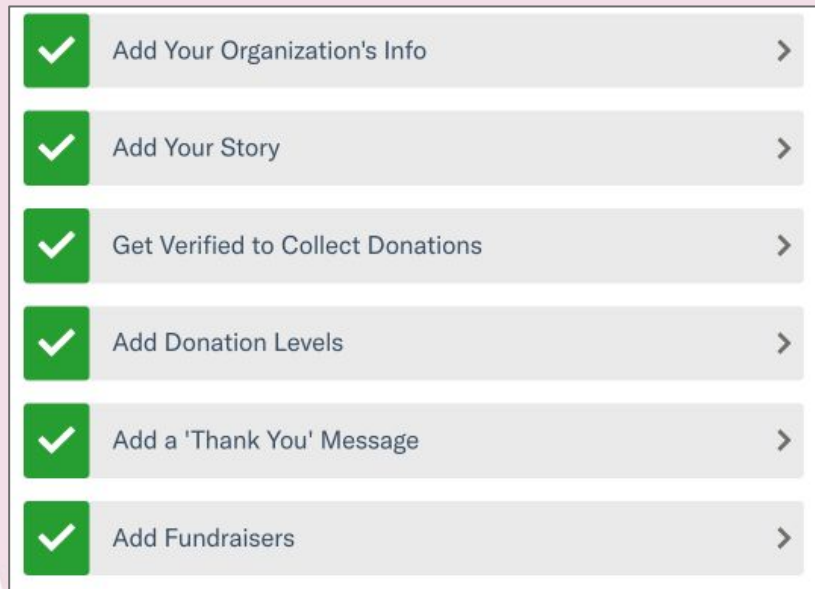


Embed a Donate Button

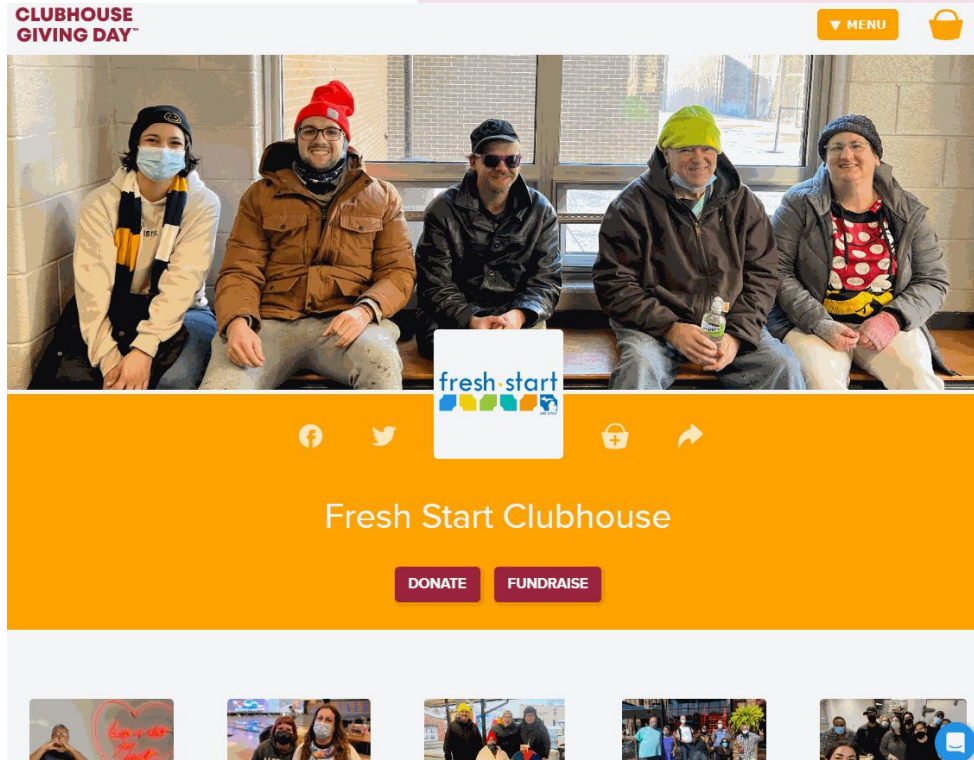
Is your profile complete?

Have you:

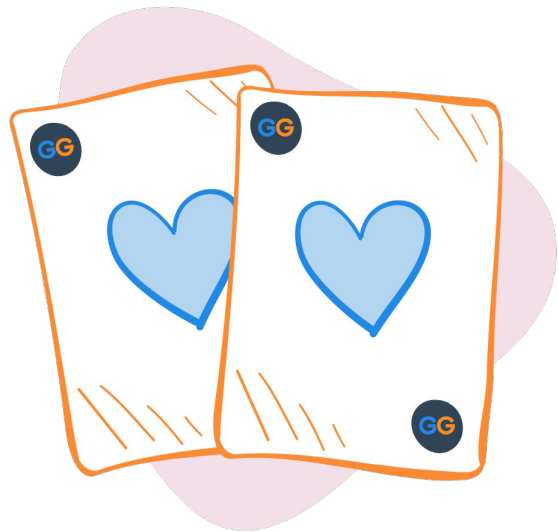
- Added your logo **and** a cover photo?
- Shared an authentic story?
- Set goals?
- Included clear calls to action?
- Featured visual content?
- Highlighted donation levels?
- Invited your fundraisers?



Is your profile complete?



Have you secured a matching gift?



- **Why?**
 - Organizations who set up a Match or Challenge for Clubhouse Giving Day raised on average **3.6** more
- 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 Clubhouse Giving Day profile
- ✓ Verify your match setup with GiveGab 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



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 Clubhouse Giving Day Nonprofit Toolkit



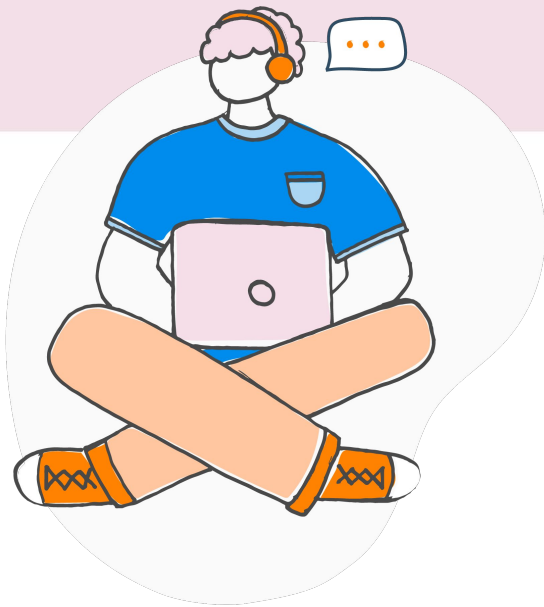
How will you communicate?



- 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

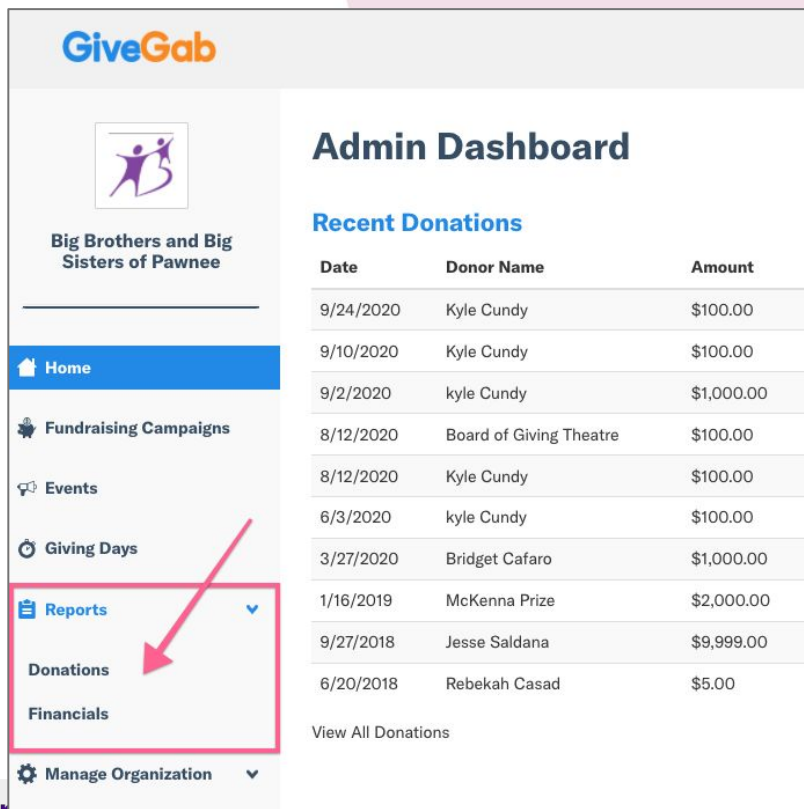
Post-Clubhouse Giving Day Success

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.com”
- Reference your **new** Financials report to reconcile deposits!

Finding Your Donor Data



GiveGab

Big Brothers and Big Sisters of Pawnee

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](#)


Navigation Menu:


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


Filtering Your Data




Pawnee Public Library

 Home


 Pawnee Gives (Support)

 Reports ▾

Donations

 Manage Organization ▾


Donations


 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
















 End



| 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 |
| <div><div> </div><div>Page 2 of 2</div></div> <div> Export CSV Edit Bank Account Info</div> | | | | |

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



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

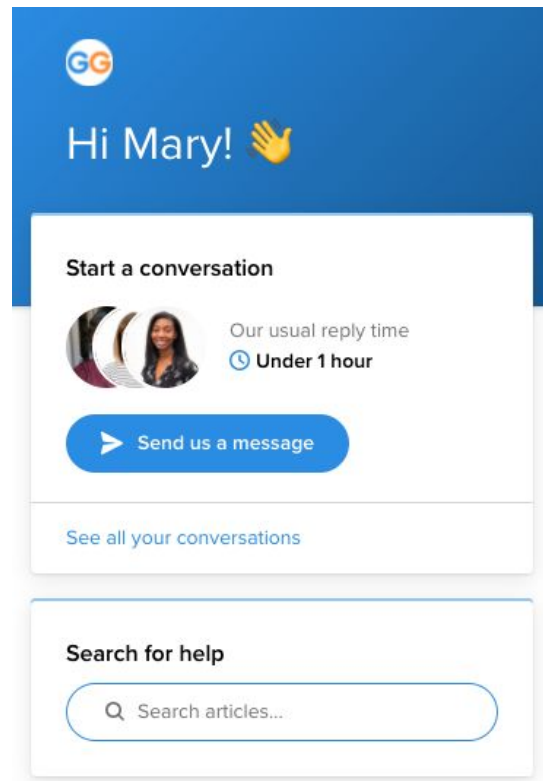
Final Checklist


- Complete your profile by **May 10th**
- Ensure you are verified to collect donations in GiveGab
- Keep an eye out for important emails!
- Follow Clubhouse Giving Day on Social Media and use the #ClubhouseWorks hashtag
- Watch on-demand training course videos
- Check out the ClubhouseToolkit



How We Support You

- Visit Our Help Center
 - support.givegab.com
- Check Out Our Blog
 - givegab.com/blog
- Send us an Email
 - CustomerSuccess@givegab.com
- Chat with GiveGab's Customer Success Team



Chat with GiveGab's Customer Success Team whenever you have questions or need a hand! Just look for the little blue chat bubble. 

Questions?



June 1, 2023