



Final Steps to Success

GIVE

WHERE YOU

LIVE

COLLIER

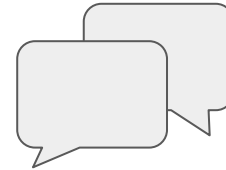
Submit Your Questions!



Chat Box

To: All panelists

Type: All panelists and attendees



Q&A

Please input your question

Send Anonymously

Send

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

Agenda

- Give Where You Live Collier Updates & Reminders
- Your Checklist for Success
- After GWYLC
- Your Nonprofit Resources
- Next Steps
- Q&A

Updates & Reminders

- February 9th and 10th, 12 PM - 12 PM
- Check Delivery Procedures
 - Donors can send checks directly to CFCC. Checks must be made out to the Community Foundation of Collier County, be dated 2/9 or 2/10, and have your organization's name and GWYL in the memo line. If not, your organization will be contacted to address with donor.
- Maintaining Offline Donation Donor Names
- Day-of Procedures
 - Check Drop Off - Same as before. Checks must be made out correctly, accompanied by the Check Register Excel form. Don't forget to send an electronic copy of that same form to Marsha Lewis at mlewis@cfcollier.org. Delivery person must wear a mask in the CFCC building and offices.
- Include CFCC and RMSFF logos on your collateral
- Social Media Feed - #GWYLCollier posts from Instagram and Twitter

Arranged Gifts

What is an “arranged gift”? Those gifts that are hard to time and/or difficult to get the right day on the check: Stock gifts, wires, contributions from donor advised funds outside the Community Foundation, etc.

When can donors begin to make an arranged gift? Now! Arranged gifts should arrive before or during the Give Where You Live Collier event. Note that donors cannot set-up an arranged gift on February 10th. If they try to set one up on February 9th, we will still have to receive it by noon on February 10th, which is unlikely. Arranged gifts have already started to come in, so it is not too soon to ask your donors for these types of gifts.

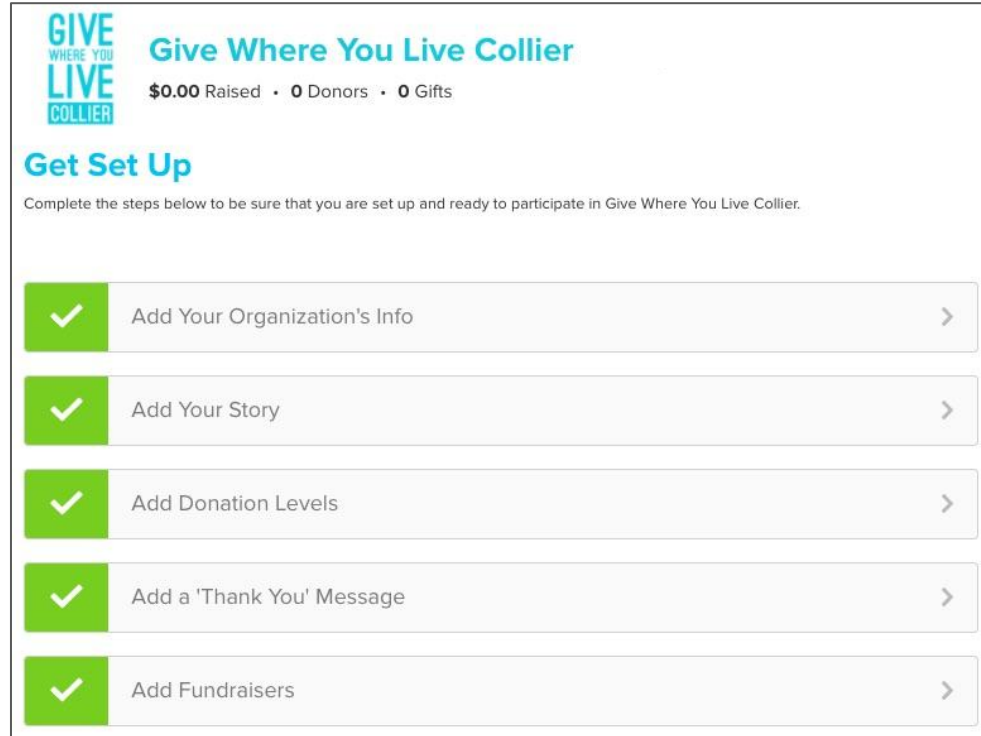
Who should donors reach out to in order to set up an arranged gift? Wendy Ponting at wponting@cfcollier.org or 239 649-5000.

Your Success Checklist

1. Finalize Your Profile
2. Engage Fundraisers
3. Prepare Communications

Is your profile completed?

- Have you:
 - Added your logo and a cover photo?
 - Shared an authentic, **up-to-date** story?
 - Set goals?
 - Included clear calls to action?
 - Featured visual content?
 - Highlighted donation levels?
 - Added P2P Fundraisers?
- Example: [Greater Naples YMCA](#)



The screenshot shows a profile setup page for 'Give Where You Live Collier'. At the top left is the logo 'GIVE WHERE YOU LIVE COLLIER'. To the right of the logo, the text reads 'Give Where You Live Collier' followed by '\$0.00 Raised • 0 Donors • 0 Gifts'. Below this is a section titled 'Get Set Up' with the instruction 'Complete the steps below to be sure that you are set up and ready to participate in Give Where You Live Collier.' There are six steps listed, each with a green checkmark icon on the left and a right-pointing arrow on the right:


- ✓ Add Your Organization's Info >
- ✓ Add Your Story >
- ✓ Add Donation Levels >
- ✓ Add a 'Thank You' Message >
- ✓ Add Fundraisers >


Who are your P2P fundraisers?










- Staff, board members, volunteers, supports, friends/family - anyone can be a P2P fundraiser!
- Expand your organization's reach
- Have their own fundraising page connected to your profile
- Spread the word on behalf of your organization
- Instructions & resources are in the Nonprofit Toolkit

Organizations with P2P raise 3.4 x more than organizations without P2P

Invite Fundraisers

 Add Fundraisers ▼

 Download CSV Add Fundraisers Upload fundraisers Message All

Fundraiser ▼	Donors ▼	Amount Raised ▼	Goal ▼	Emails Sent ▼	Facebook Intents ▼	Twitter Intents ▼	Actions ▼
Bridget Cafaro	1	\$100.00	\$500.00	0	0	0	  
Molly Heslin	1	\$70.00	\$500.00	0	0	0	  
Alyssa Ravenelle	0	\$0.00	\$500.00	0	0	0	  

Allow New Fundraisers to Sign Up


Set Fundraisers' Story

Set Fundraisers' Goal

Each fundraiser may customize his or her story and goal by logging into GiveGab.

Save

Invite Fundraisers

 **Add Fundraisers** ▼
Recruit peer-to-peer fundraisers to expand your network of donors.

Add Fundraisers

First Name	Last Name	Email
<input type="text" value="Rebekah"/>	<input type="text" value="Casad"/>	<input type="text" value="rebekah@givegab.co"/> ✕

[+ New Fundraiser](#)

[Cancel](#) [Next: Compose Your Message](#)

Each fundraiser may customize his or her story and goal by logging into GiveGab.

[Save](#)

Invite Fundraisers

Write a Message to Your Recruits

To: Rebekah Casad

Subject


Help me fundraise during giving day!

Message



Come create your own fundraising page to help our organization during the Giving Day!

[Back](#) [Send](#)

Invite Fundraisers

 Add Fundraisers ▼

Download CSV Add Fundraisers Message All

Fundraiser	Donors	Amount Raised	Goal	Emails Sent	Facebook Intents	Twitter Intents	Actions
Rebekah Casad	0	\$0.00	\$500.00	0	0	0	 

Allow New Fundraisers to Sign Up

Set Fundraisers' Story

Set Fundraisers' Goal

Each fundraiser may customize his or her story and goal by logging into GiveGab.

Save

Help Fundraisers Succeed

- Share the [P2P Guide](#) with your fundraisers
 - Detailed signup instructions
 - Email & Social media tips & templates
 - Downloads
- Set internal goals for your fundraisers
 - Then let them know how they can help you reach those goals!
- Set clear expectations for participation
- Be sure to say thank you!



Do you have a communications plan?

- Plan your online communications ahead of Give Where You Live Collier
 - Announcement/Save The Date
 - Campaign Countdown
 - Day-Of Updates
 - Supporter Gratitude
- Utilize multiple online channels for the best engagement
 - Social Media
 - Email Communications
 - Organization Website
 - Ambassador Sharing
- Customize the templates, guides, and graphics in your Nonprofit Toolkit for the perfect plan!

After Give Where You Live Collier

How will you get your donor data?

The screenshot shows the GiveGab Admin Dashboard for an organization named "Logan's Pups". The dashboard is divided into several sections:

- Header:** Includes the GiveGab logo (Nonprofit Giving Platform), navigation links for Home and Support, and a user profile icon.
- Left Sidebar:** A navigation menu with options: Home, Fundraising Campaigns, Events, Giving Days, Reports, and Manage Organization.
- Admin Dashboard:** The main content area, titled "Admin Dashboard" for "Logan's Pups". It shows the current plan as "Engage".
- Giving Days:** A section titled "Giving Days" featuring a "DAY OF GIVING" event on November 13, 2019. A link "View All Giving Days" is provided.
- Fundraising Campaigns:** A section titled "Fundraising Campaigns" featuring a campaign "It's A Dogs World" on December 11, 2017, with "\$20,467.22 Raised". Action buttons for "View", "Manage", and "Edit" are present. A link "View All Campaigns" is also shown.
- Fundraising Events:** A section titled "Fundraising Events" featuring a "2018 Summer Gala" event. Action buttons for "View", "Manage", and "Edit" are visible.
- Footer:** A dark blue bar at the bottom stating "Viewing Dashboard for Logan's Pups" with a star icon and a chat bubble icon.

How will you get your donor data?

The screenshot shows the GiveGab dashboard for the organization "Logan's Pups". The main section is titled "Donations" and displays a summary of financial activity: "Total Paid Out: \$240,804.74" and "Total Pending: \$6,164.39". Below this is a filter section with a search bar, a "More filters" button (annotated with a red arrow and the number "1"), and a dropdown menu for "All Giving Days" (annotated with a red arrow and the number "2"). The dropdown menu is open, showing "All Campaigns" selected and highlighted with a red box. Below the filters is a table of donations with columns for Actions, Donation ID, Date, Donor, Intended Donation, Amount Charged, Bank Fees, Platform Fees, Covered Fees?, Payout Amount, Payout Date, Display Name, and Donor Address. The table contains seven rows of donation data.

GiveGab
Nonprofit Giving Platform

Home Support

Donations

Total Paid Out: \$240,804.74 Total Pending: \$6,164.39

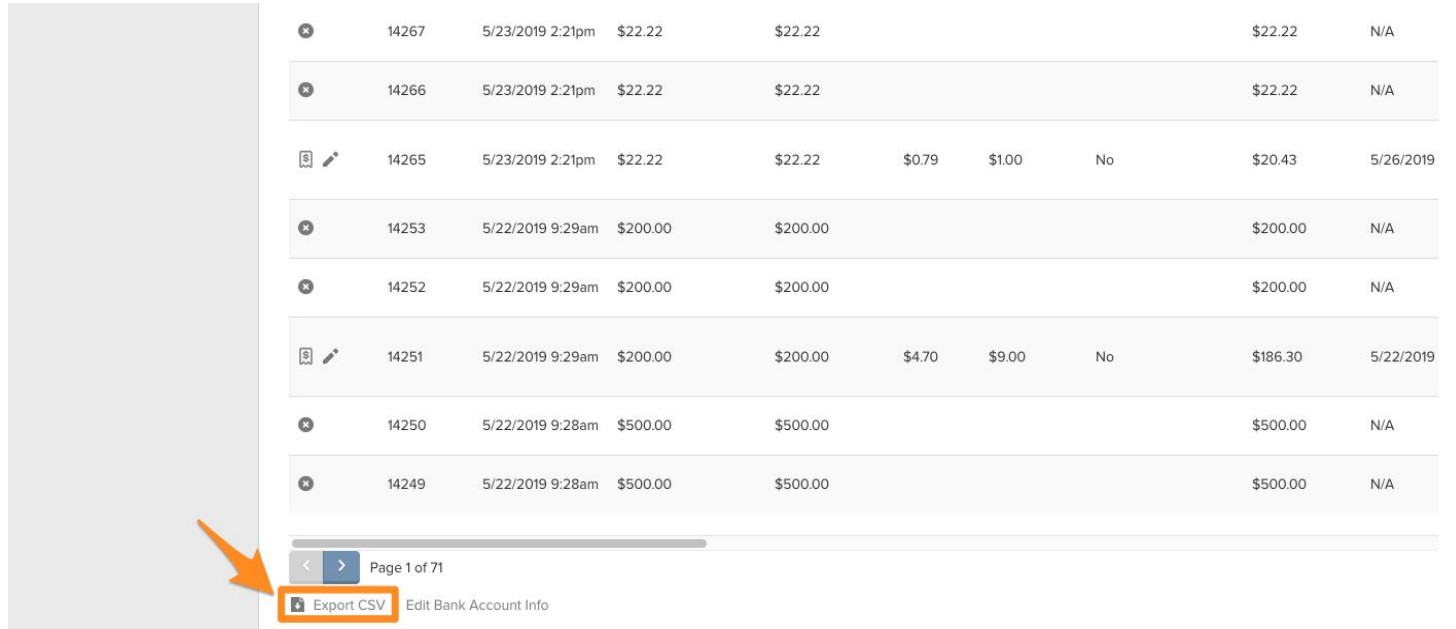
Search by name or email [+ More filters](#)

All Giving Days **All Campaigns** Any Donation Type

Actions	Donation ID	Date	Donor	Intended Donation	Amount Charged	Bank Fees	Platform Fees	Covered Fees?	Payout Amount	Payout Date	Display Name	Donor Address
✕	15062	7/11/2019 9:50am	Australia Match Test	\$25.00	\$25.00				\$25.00	N/A		
📄 ✎ ✕	15061	7/11/2019 9:38am	test denis.tomazzi@givegab.com	\$100.00	\$100.00				\$100.00	N/A	hello	213 N Cayuga St Ithaca, New York 1485 United States
📄 ✎ ✕	15059	7/10/2019 2:59pm	Karin Edsall karin.edsall@givegab.com	\$150.00	\$156.75	\$3.75	\$3.00	Yes	\$150.00	Pending		401 State St Ithaca, New York 1485 United States
✕	15058	7/10/2019 2:44pm	Australia Match Test	\$100.00	\$100.00				\$100.00	N/A		
📄 ✎ ✕	15057	7/10/2019 2:44pm	Denis Tomazzi denis.tomazzi@givegab.com	\$100.00	\$100.00	\$2.50	\$2.00	No	\$95.50	Pending		213 N Cayuga St Ithaca, New York 1485 United States
✕	15052	7/10/2019 2:03pm	campaign match	\$5.00	\$5.00				\$5.00	N/A		

Viewing Dashboard for Logan's Pups

How will you get your donor data?



The screenshot shows a table of donor transactions. An orange arrow points to the 'Export CSV' button in the bottom left corner of the table area.

✖	14267	5/23/2019 2:21pm	\$22.22	\$22.22				\$22.22	N/A
✖	14266	5/23/2019 2:21pm	\$22.22	\$22.22				\$22.22	N/A
📄 ✎	14265	5/23/2019 2:21pm	\$22.22	\$22.22	\$0.79	\$1.00	No	\$20.43	5/26/2019
✖	14253	5/22/2019 9:29am	\$200.00	\$200.00				\$200.00	N/A
✖	14252	5/22/2019 9:29am	\$200.00	\$200.00				\$200.00	N/A
📄 ✎	14251	5/22/2019 9:29am	\$200.00	\$200.00	\$4.70	\$9.00	No	\$186.30	5/22/2019
✖	14250	5/22/2019 9:28am	\$500.00	\$500.00				\$500.00	N/A
✖	14249	5/22/2019 9:28am	\$500.00	\$500.00				\$500.00	N/A

Page 1 of 71

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



How will you thank your donors?

- Start your stewardship process immediately after the Giving Day!
 - Remember your thank you letters should not be tax letters
- Generate some post-giving day messaging to all supporters
 - Social media posts and overall success update
 - Giving Day thank you email to your organization's email list
- Follow up with more personal stewardship
 - Access information in your GiveGab Dashboard
- Highlight impact of donor-funded projects
 - This doesn't have to happen right away, curate a progress message to send in June/July
- Watch the [available training](#) on Donor Stewardship!



What Happens After GWYLC?

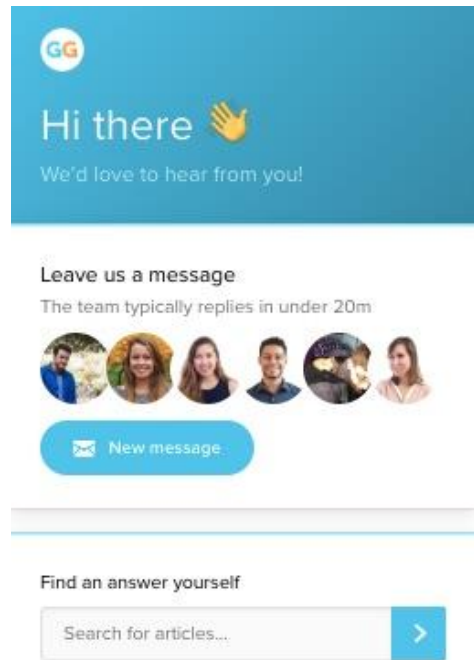
- Offline Report Questions?
 - Contact Wendy Ponting, wponting@cfcollier.org
- Payout Timeline
 - Dust does need to settle
 - Similar to last year - mid March
- Virtual Follow-up Meeting

Your Nonprofit Resources

- Customizable Email Templates and Guides
- Sample Social Media Posts and Best Practices
- Customized Downloadable Graphics & Zoom backgrounds
- On-Demand Training Course Videos
- Resources for Board Members and P2P Fundraisers
- Blog Articles and How-To Videos from GiveGab

Giving Day Support & Resources

- Visit Our Help Center
 - <https://support.givegab.com/>
- Check Our Our Blog
 - <https://www.givegab.com/blog/>
- Send us an Email
 - CustomerSuccess@givegab.com
- Chat with GiveGab's Customer Success Team whenever you have questions or need a hand!
 - **Look for the little blue chat bubble!**



Your Next Steps

- Start your communications if you haven't already
 - Send out a countdown email and post a save the date on social media
- Check your inbox for important emails
- Watch on-demand training course videos
- Check out the Nonprofit Toolkit
- Clearly communicate the arranged gift and check delivery procedures to your donors.

GiveGab[®]

Questions?

GIVE
WHERE YOU
LIVE
COLLIER