

Final Steps to Success

February 15 - 16, 2023

GIVE
WHERE YOU
LIVE
COLLIER

Submit Your Questions!

This is being recorded. The recording will be available on the /trainings page by **Wednesday, January 18.**

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

Introduce yourself! Name, location, organization.



Chat Box

To: All panelists
Type: All panelists and attendees



Q&A

Please input your question

Send Anonymously

Agenda



- Updates & Reminders
- Goal-setting Strategies
- Engaging Your Board
- Prepping Your Communications
- After Give Where You Live Collier
- Next Steps
- Q&A

Updates and Reminders

- Review your organization's approval status
 - If your organization is not yet approved, check your email for a notice from Dawn Grundeman at dgrundeman@colliercf.org that your Nonprofit Directory profile needs to be updated. GWYL profiles will be approved once Nonprofit Directory profile updates are made.
- Include CCF and RMSFF logos on your collateral
- Social Media Feed - #GWYLCollier posts from Instagram and Twitter

Updates and Reminders

- Check Delivery Procedures
 - Donors can send checks directly to CCF. Checks must be made out to the Collier Community Foundation, be dated 2/15 or 2/16, and have your organization's name and GWYL in the memo line. If not, your organization will be contacted to address with donor.
- 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.
 - ***This form will be available on the nonprofit toolkit page next week**

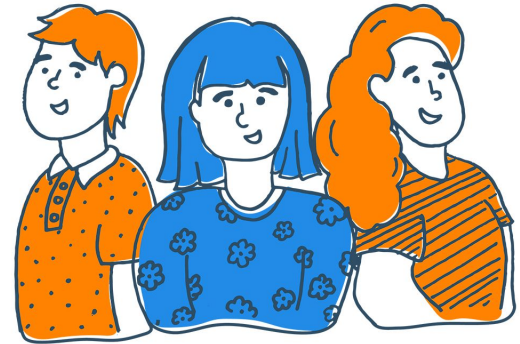
Arranged Gifts

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 15th. If they try to set one up on February 14th, we will still have to receive it by noon on February 15th, 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@colliercf.org or 239 649-5000.

Goal Setting Strategies



Questions To Ask Before Your Giving Day



- What were we able to achieve in previous years?
- Do we have a campaign or event around this time of year?
- What are our most crucial needs at this time?
- What will help to improve long term sustainability?

Popular Giving Day Goals

- Monetary Amount
- Donor Amount
- New Donors
- Repeat Donors
- Win Prizes
- Board Engagement
- P2P Engagement
- Volunteer Engagement
- Social Media Engagement



Setting Your Goals

- Narrow down 1-3 specific goals to focus on
- Determine which goals are internal vs. external
 - Internal: Become more familiar with online fundraising tools, strengthen relationships with board members
 - External: Raise \$5,000 for new supplies, secure at least \$1,000 in matching funds prior to the day.
- Stretch goals are great to have in your back pocket should you reach an external goal before the giving day is over!

Who should know about your goals?

- **Internally:** Board Members, Staff, Steering Committees
- **Externally:** Major/Recurring Donors, Matching Sponsors, Fundraisers, Donors and other supporters

This distinction is important, as you may need to curate different “asks” for these individuals as a result of the goal(s) you set.

Where should you share your external goals?

- Everywhere you communicate with donors!
- Include your goals in the story section of your page
- Add goals to social media posts and provide updates throughout the Giving Day to keep donors engaged
- Share your goal ahead of time in your newsletter or email
- Create graphics to help visualize your goal, and use them in social media

Sample Strategies



Monetary Goal Strategies

- Make it clear what the funds raised will help you achieve
- Recruit peer-to-peer fundraisers to help you expand your reach to more donors
- Collect stories from those who would be directly impacted

The screenshot shows a fundraising page for 'PAWNEE GIVES' titled 'Logan's Pups'. The page features a large image of a dog's face at the top. Below the image, there are social media icons (Facebook, Twitter, Instagram) and a small profile picture. The name 'Logan's Pups' is displayed, along with 'DONATE' and 'FUNDRAISE' buttons. A progress bar indicates that 30% of the goal has been reached, with '\$995 Raised', '\$10,000 Goal', and '6 Donors'. Below the progress bar, there are four donation options with images of dogs and descriptions of what the funds will be used for:

- \$25**: Provides one week of food for a senior pup
- \$50**: Provides a super soft bed for a loving senior pup
- \$100**: Helps a family foster one of our amazing senior pups
- \$500**: Provides life changing surgery to a senior pup in need

At the bottom, there is a 'CHOOSE YOUR OWN AMOUNT' button and a navigation menu with links for 'Our Story', 'Matches', 'Fundraising Campaigns', 'Top Fundraisers', and 'Recent Donors'. A chat icon is visible in the bottom right corner.

Donor Goal Strategies

- Create donation levels in lower amounts to encourage lower capacity donors
- Find significance in the number you chose for your goal and share it!
- Recruit peer-to-peer fundraisers to help you expand your reach
- Encourage social sharing amongst your supporters
- Motivate your supporters with an incentive for the donor that reaches your goal



\$5

One bag of bones for our senior pups!



\$10

One blanket to keep our pups cozy.



\$15

One case of yummy food to feed our pups!



\$20

One water fountain to keep our pups hydrated!



\$25

One shot to keep our pups disease free!

New Donor Goal Strategies

- Recruit peer-to-peer fundraisers to help you expand your reach
- Highlight benefits of being a donor to your organization
- Share stories about your existing donors and why they give
- Use hashtags on social media to be seen in different conversations
- Ask each of your supporters to share your profile with friend



New Here?

First time donors receive a free Logan's Pups t-shirt when they make a contribution on Giving Day!

Join the Logan's Pups Family Today

Key Takeaways

- Set clear goals prior to the Giving Day to help you develop a more focused strategy for success.
- Communicate your goals regularly and keep supporters updated.
- Incorporate goals into your storytelling and use your profile to help donors visualize the impact their gift can have



Engaging Your Board



Planning Ahead

Outside of giving day prep:

- ❑ Add/include giving day participation as an expectation of your board members

As you prep for the giving day:

- ❑ Determine where your board members can help the most
- ❑ Make it clear what role they'll play in your overall Giving Day strategy
- ❑ Create an even playing field for all your board members to actively participate and assist you in the process

Including your board members

- Have a Giving Day campaign kick-off at a board meeting
- Include them in goal setting where appropriate
- Keep them updated on planning progress
- Share helpful resources with them
 - Templated emails, social media posts, a link to your organization's page, etc.
- Provide several clear and easy opportunities for them to engage
- Prepare them to be Peer-2-Peer Fundraisers

What is P2P Fundraising?



Peer-to-Peer Fundraising allows your supporters to create and host their own personal fundraising pages right within your Give Where You Live profile. Their totals roll up into your totals!

Preparing Your Board for P2P

START EARLY → BE CLEAR → MAKE IT EASY

- ❑ Ask early and share clear expectations
- ❑ Provide resources and host a P2P prep gathering or info session
- ❑ Create clear goals and check in with your fundraisers
- ❑ Motivate and empower them to share personal stories
- ❑ Incentivize fundraisers and create friendly competition

P2P Alternative: Social Ambassadors

Social Media

- Share posts
- Board Social Media Guide
- Add Donor badge to profile pic
- Share personal stories of connection

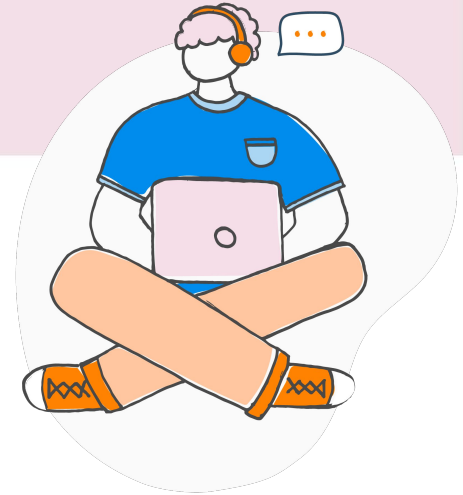


Networking

- Outreach
- Community Partnerships
- Personal Letters
- P2P

During the Giving Day

- Encourage your Board Members to share socially
 - Check out the [Board Social Media Guide](#)
- Send your board emails with specific calls to action
- Update them on any prizes or matches on the horizon or campaign milestones
- Share your progress throughout the event
- Ask your board members to join you for a virtual event



After the Giving Day



- Thank your board members for their help and hard work
- Host a debrief to review what you've learned, and strategize for next year
- Ask your board to personally thank your Giving Day donors
- Celebrate your successes and a job well done!

Key Takeaways

- Make sure you set the expectation of your board's participation
- Provide several straightforward easy opportunities for them to engage
- Set your board members up as Peer to Peer fundraisers
- Provide your board with regular updates about fundraising goals, and progress
- Celebrate your success with your board!

Prepping Your Communications



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 Give Where You Live Collier Nonprofit Toolkit

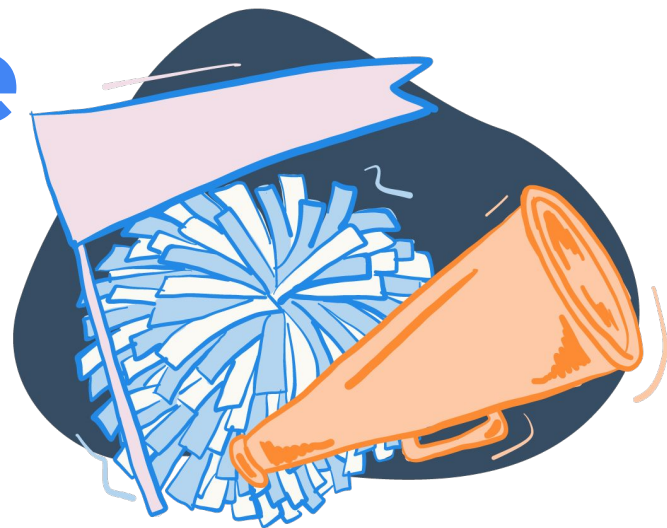


How will you communicate?

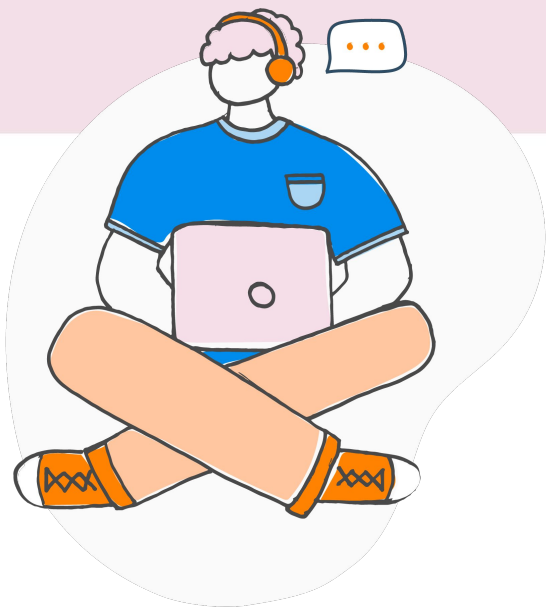


- Utilize multiple online channels
 - Social Media
 - Email and direct mail communications
- C.O.P.E. Create Once, Post Everywhere!
- Curate authentic visual content
- **Pro Tip:** Create QR codes for your profile

After Give Where You Live Collier



What Happens Next?

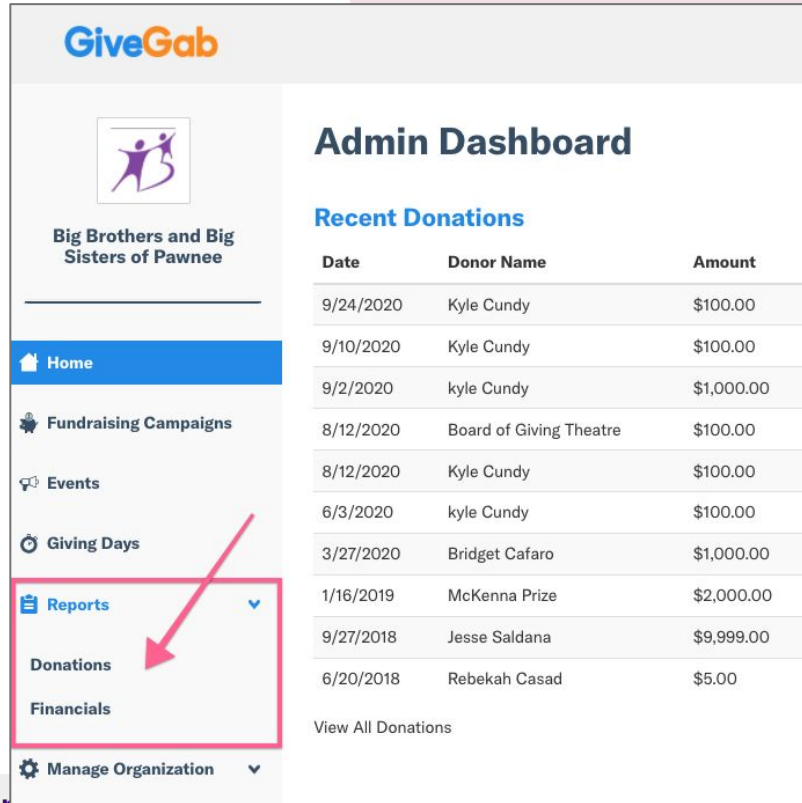


Offline Report Questions? Contact
Wendy Ponting, wponting@colliercf.org

Payout Timeline - Similar to last year -
mid March

Virtual Follow-up Meeting - Details
TBD

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](#)


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](#)


▾ ▾ ▾


| 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 |

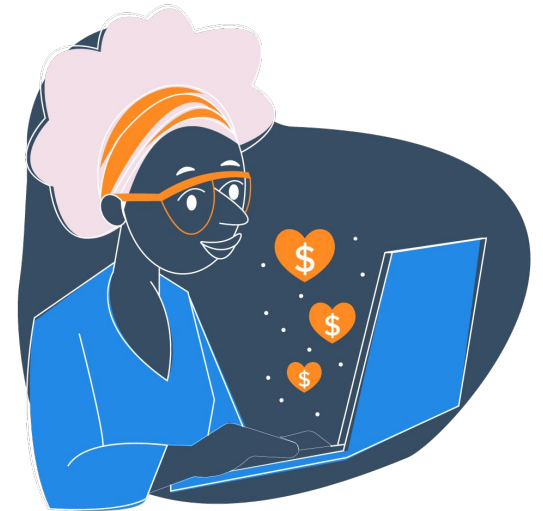
  Page 2 of 2

 [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 how their gift had a tangible impact, and what you were able to achieve as a result
- Segment your thank yous for new donors, P2P donors, etc.
- Review your donor data, compare it to previous years
- Watch the [available training](#) on Donor Stewardship!

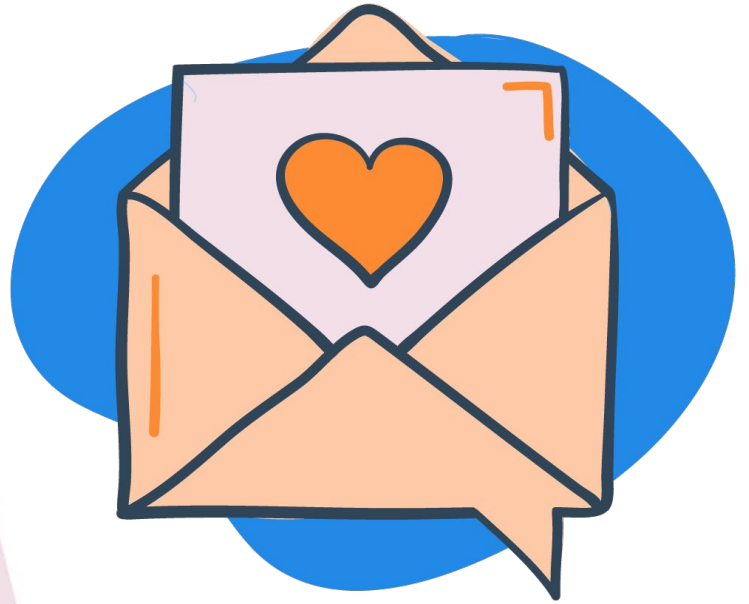


'Thank You' Resources

- Customizable Email Templates and Guides for stewardship
- Sample Social Media Posts and Best Practices
- Give Where You Live Collier Downloadable Graphics
- Resources for Board Members and P2P Fundraisers



Your Next Steps



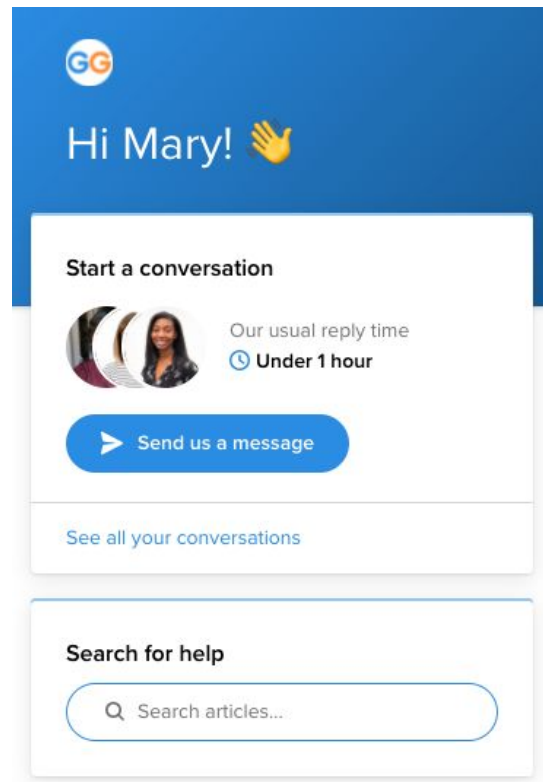
Final Checklist


- Complete your profile **by January 17**
- Follow the Community Foundation's new social media accounts: **@CollierCFFL** and use **#GWYLCollier**
- Watch your inbox for important emails
- Meet internally to discuss goals
- Prepare your board for Giving Day involvement
- Explore the toolkit



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?

GIVE
WHERE YOU
LIVE
COLLIER