

# Getting Ready for Your Giving Day

# Meet the Team



**Claire**

Associate  
Project  
Manager



**Nickie**

Giving Day  
Growth  
Manager

# 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.



# Agenda

- Giving Day Overview
- Who is GiveGab?
- What's New in 2024
- Registering for your Giving Day
- Creating Your Profile
- Next Steps & Questions

# Overview

- Giving Days:
  - [Give Great Falls](#)
  - [Greater Helena Gives](#)
  - [Missoula Gives](#)
  - [Yellowstone Valley Gives](#)
- Every nonprofit conducts their own unique campaign to market and share with their supporters
- IRS-recognized nonprofits are eligible to participate
  - Able to accept ACH deposit transfers into a valid checking account

# Benefits of Participating

- Learn to utilize digital fundraising tools, and take advantage of resources that are available year-round!
- Re-Engage with your existing supporters and gain new donors
- Combine your marketing efforts + Giving Day Host marketing = exponential visibility for all organizations
- 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?



**Bonterra's mission is to power those who power social impact**

- Host a secure, reliable and transparent platform for your giving day
- Create the ultimate donor experience
- Provide a dedicated support team
- GiveGab is becoming Bonterra!



# Donation Security

- Partnered with Stripe - PCI Level 1 Payment Processor for donation processing
- Direct deposit funds within 5-7 business days
- Your banking information is reviewed by Stripe
- Donor credit card information is not revealed or saved in GiveGab
- All participating organizations verified as IRS and state-recognized nonprofits



# Simple Donation Processing

- All major credit cards accepted
- Log right into your bank to use the Plaid/ACH payment
- Quick, easy and fun donation flow
- Securely processed through Stripe
- GiveGab's chat support available right within the donation form for your supporters!



# Transparent Donations

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](#).

- Credit Card, ACH, Mobile Pay for online transactions
- Donors can cover all fees on behalf of your organization
- Historically, donors cover 65-75% of fees during a Giving Day



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

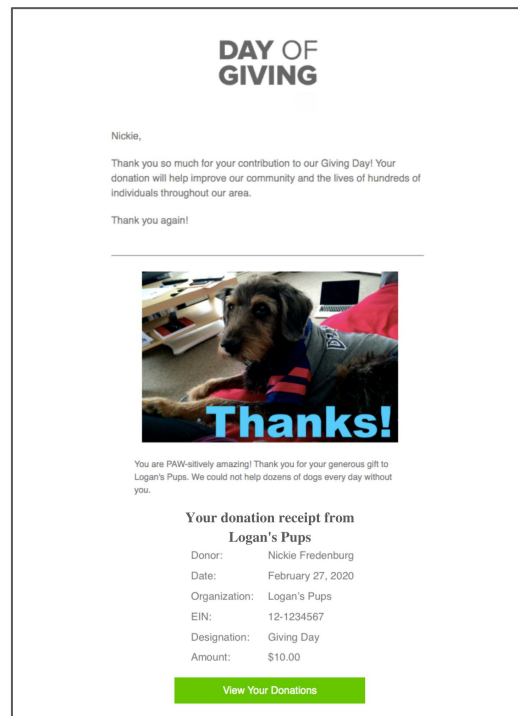
+ ADD ANOTHER ORGANIZATION



GiveGab's Giving Day Gift Basket makes it easy for donors to support as many causes as they like!

# Instant Donor Delight

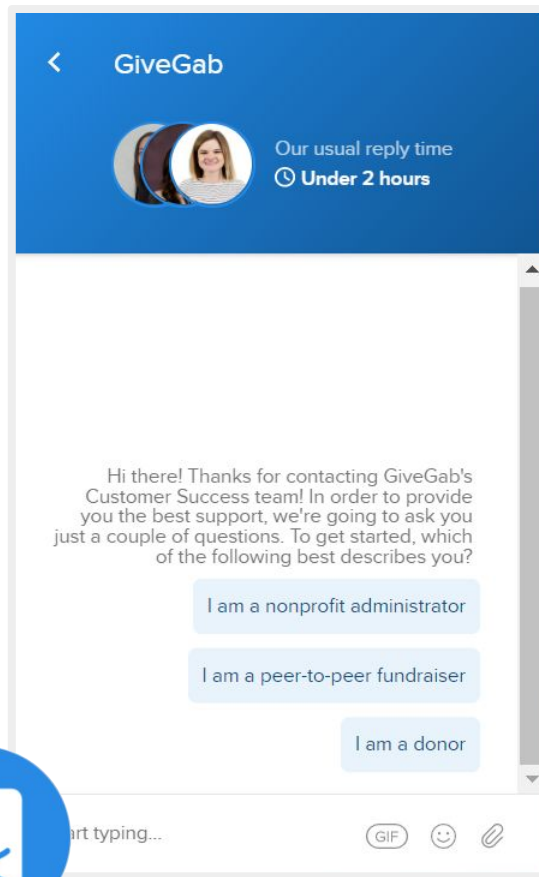
- A Thank You email that comes from your organization
- Sent immediately after the gift is made
- Includes your organization's EIN and donation amount to act as a tax-deductible receipt



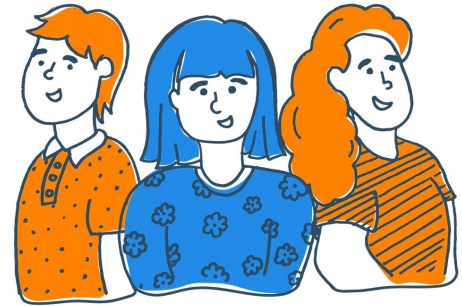
# How We Support You

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

**GiveGab**



# What's New for 2024?



# 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.



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**

<b>\$15,115.00</b> TOTAL RAISED	<b>26</b> TOTAL DONORS	<b>42</b> TOTAL DONATIONS
------------------------------------	---------------------------	------------------------------

**Online Stats**

<b>\$3,845.00</b> RAISED ONLINE	<b>16</b> ONLINE DONORS	<b>31</b> ONLINE DONATIONS
------------------------------------	----------------------------	-------------------------------

**Offline Stats**

<b>\$11,270.00</b> RAISED OFFLINE	<b>10</b> OFFLINE DONORS	<b>11</b> OFFLINE DONATIONS
--------------------------------------	-----------------------------	--------------------------------



# Sign up Via Fundraiser Page

Supporters can now sign up from the menu of your giving day site under the 'Fundraiser' Page.



# Registering for your Giving Day



Search...

GREATER HELENA  
*GIVES*

Presented By  
HELENA AREA  
COMMUNITY FOUNDATION

REGISTRATION OPEN NOW!

Registration open from Feb 14 - April 12

Greater Helena Gives begins in

63 : 10 : 38 : 19  
days hours mins secs

# Find Your Organization

and participate in Greater Helena Gives

Search for your organization

---

Start typing in the box above to find your organization.



Don't see your organization listed?

You can create an organization by clicking the button below.

**ADD MY ORGANIZATION**



## Give Big Gallatin Valley 2022

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

## Give Big Gallatin Valley 2022

Continue

Welcome to Missoula Gives & Bitterroot Gives! Please fill out the form below to register for the 2021 giving day. Please choose your registration type carefully as it is based on your operating budget size:

Small NPO = <\$100k

Medium NPO = \$100k-\$500k

Large NPO = >\$500k

Please fill out the form as completely as you can, the more information you provide the better. Missoula Gives is a program of the Missoula Community Foundation. We are excited to work together to better our communities! Together let's raise a HALF MILLION for Missoula & Ravalli Counties this year!

### Registration Type

- |  |          |
|--|----------|
| <input type="radio"/> Early Bird small budget  | \$100.00 |
| <input type="radio"/> Early Bird medium budget | \$130.00 |
| <input type="radio"/> Early Bird large budget  | \$175.00 |

 Do you have a registration code?

1. What is your business phone number? \*

### Credit Card Information

First Name

Last Name

Credit Card Info

 Card number	MM / YY CVC
---	-------------

Register

# Returning? Copy Your Profile!

- Be sure to update your existing content so it's up to date!
- Existing bank account information will carry over



Welcome to Another Giving Day!

As a giving day veteran, you may want to copy over content and settings from the profile you created for a previous giving day. You can edit your profile afterwards to ensure it represents your organization correctly in your upcoming giving day.

72 Days to Launch

Participation Approval  
Status

Pending



Give Big Gallatin Valley (2021)

Copy This Profile



Give Big Gallatin Valley (2020)

Copy This Profile

# Completing Your Profile



# Your Giving Day Dashboard



Add Your Organization's Info



Add Your Story



Get Verified to Collect Donations



Add Donation Levels



Add a 'Thank You' Message



Add Fundraisers



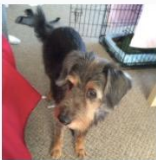
# Basic Info

- Logo
- Website
- Causes
- **Pro Tip:** Adding causes to your profile can help new donors find you by our cause-based search!

✓ Add Your Organization's Info

Website

Logo



Select Image

Remove

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

Causes (optional)

Cause #1

Animals

Cause #2

Cause #3


Save

# Curate Your Story

- Add a cover photo
- Set a monetary goal
- Tell the story of your organization's participation in the giving day through words and visuals

✓ Add Your Story

Cover Photo



Select Image

Remove

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>.

Save

# Get Verified

- State Attestation Compliance
- Basic information about your organization
- Banking information for your organization
- Organization Representative information
- This is separate from your “application” process to participate
- **Pro Tip:** Don't wait to complete this information. It can take at least several days, and in some instances 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



## Complete Your Verification

Set Up Donations

Documents

### Set Up Donations

#### State Charitable Solicitation Compliance Attestation

☐ I attest that my organization is compliant with applicable state fundraising requirements in the states in which I may solicit donors using the GiveGab platform. I understand that GiveGab does not solicit donors.

This confirmation is required to collect donations on GiveGab. [Learn more about state charitable solicitation compliance.](#)

Save

#### IRS Verification

If you complete the Payment Processor Verification below, you do not need to submit this IRS Verification section.

EIN/Tax ID

Please enter the 9 digits without the dash.

Don't have your EIN? Search [here](#).

Save

#### Payment Processor Verification

Verify Your Organization

# Get Verified

GiveGab



Bonterra partners with  
Stripe for secure financial  
services.

[← Return to Bonterra](#)

Powered by **stripe** <sup>①</sup>

[Terms](#)

[Privacy](#)

English (US) <sup>↕</sup>

Contact Bonterra for support  
[customersuccess@givegab.com](mailto:customersuccess@givegab.com)

## Tell us more about your business

Stripe collects this information to better serve your business and help meet the requirements of regulators, financial partners, and our [Services Agreement](#).

Legal business name

The combination of your name and Employer Identification Number (EIN) must exactly match the one listed on your IRS documents (e.g., Letter 147C or SS-4 Confirmation letter), including capitalization and punctuation.

Employer Identification Number (EIN)

If you use your Social Security number for business tax purposes, you can enter that instead. If you are uncertain about which Tax ID guidelines are best for your organization, please refer to this [support article](#).

Doing business as Optional

The operating name of your company, if it's different than the legal name.

# Get Verified on GiveGab


The screenshot shows the 'Set Up Donations' page on GiveGab. On the left is a sidebar menu with options: Home, Giving Days, Reports, Manage Organization (selected and highlighted with an orange box), Edit Information, Add Administrator, Bank Account & Verification (highlighted with a blue bar and an orange arrow pointing to the main content), Supporters, Documents, EveryAction CRM Integration, and Mobilize Integration. The main content area is titled 'Set Up Donations' and contains three sections: 1. 'State Charitable Solicitation Compliance Attestation' with a checkbox for compliance, a 'Save' button, and a link to 'Learn more about state charitable solicitation compliance'. 2. 'IRS Verification' with a text field for 'EIN/Tax ID' containing '12-1234567'. 3. 'Payment Processor Verification' which includes a note about direct deposits, 'Organization Information' (Business Name: ABC Nonprofit Name, EIN: 12-1234567, Statement Descriptor: givingday-payment), 'Organization Representative' (John Smith), 'Bank Information' (Bank Name: ABC BANK 123, Checking Account: \*\*\*\*1234, Routing Number: 12345678), and an 'Update Required Information' button at the bottom. An orange arrow points from the bottom left towards this button. The bottom of the page has a blue chat bubble icon.

- When submitting details through the portal, we advise organization admins to avoid revisiting the form, or clicking the 'back' button after submission.
- Updates may take a few minutes to process, and re-clicking the "Update Required Information" button will reset the organization representative information.
- If verification exceeds a few minutes, please contact our support team via the blue chat bubble.





For any inquiries, feel free to direct them to GiveGab's support team at [support@givegab.com](mailto:support@givegab.com)

# Suggest Donation Levels

- Custom amounts
- Unique descriptions
- Optional photos
- Unlimited Levels
- **Pro Tip:** Using custom amounts to represent your organization, like a tangible good or service, further connects the donor to your goal

 Add Donation Levels

We recommend having 3 or 4 donation levels.

	<b>\$25.00</b> Provides one week of food for a senior pup <a href="#">Edit</a> <a href="#">Remove</a>
	<b>\$50.00</b> Provides a super soft bed for a loving senior pup <a href="#">Edit</a> <a href="#">Remove</a>
	<b>\$100.00</b> Helps a family foster one of our amazing senior pups <a href="#">Edit</a> <a href="#">Remove</a>
	<b>\$500.00</b> Provides life changing surgery to a senior pup in need <a href="#">Edit</a> <a href="#">Remove</a>

Add Donation Level



# Personalized Gratitude

- Add your own message
- Include a photo **or** video for more personal stewardship!
- Sent immediately to your donors when they complete their gift
- Donors can reply to that email and contact you directly

☒ 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.



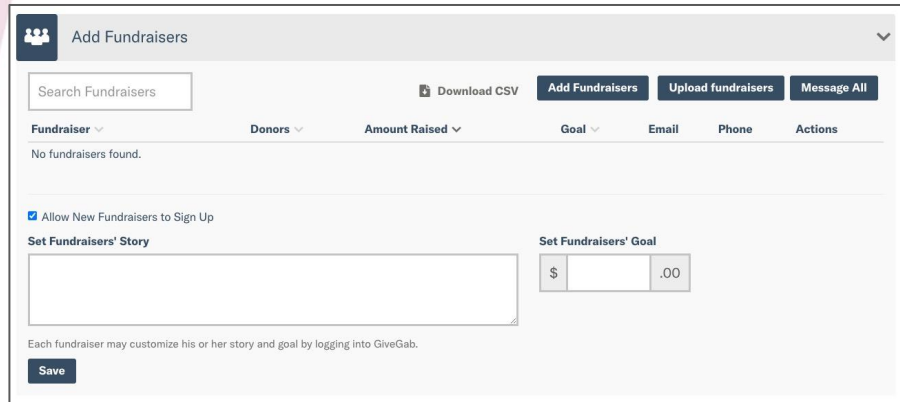
Select Image Remove

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

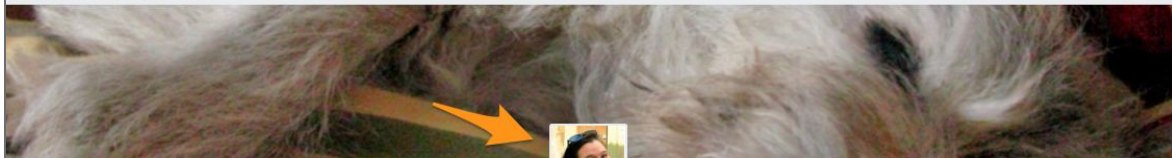
Save

# Invite Your Fundraisers

- Ask supporters to reach out to their networks on your behalf
- Each fundraiser creates their own page to collect donations. Their totals roll up into your totals!
- Easily manage their pages
- **Pro Tip:** Watch the [Peer-to-Peer Fundraising Training Video](#)



The screenshot shows the 'Add Fundraisers' management page. At the top, there's a header with a group icon and the title 'Add Fundraisers'. Below this is a search bar labeled 'Search Fundraisers' and a 'Download CSV' button. To the right are three buttons: 'Add Fundraisers', 'Upload fundraisers', and 'Message All'. A table header is visible with columns: 'Fundraiser', 'Donors', 'Amount Raised', 'Goal', 'Email', 'Phone', and 'Actions'. The table body shows 'No fundraisers found.' Below the table, there's a checkbox labeled 'Allow New Fundraisers to Sign Up' which is checked. Underneath is a section titled 'Set Fundraisers' Story' with a large text input area. To the right of this is a 'Set Fundraisers' Goal' section with a currency selector '\$' and a numeric input field showing '.00'. A note at the bottom states 'Each fundraiser may customize his or her story and goal by logging into GiveGab.' and there is a 'Save' button.

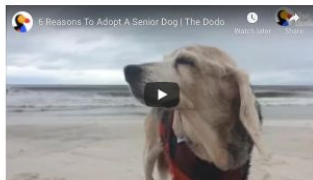


Bridget Cafaro's fundraiser for  
Logan's Pups

DONATE

20%

\$100 Raised \$500 Goal 1 Donors



Owning a senior dog changed me for the better and I hope that by supporting Logan's Pups I can help more senior pups find the loving homes they deserve and educate my friends and family about how amazing owning a senior dog can be!



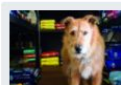
\$25

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

CHOOSE YOUR OWN AMOUNT



# Did you know?

Organizations who used P2P fundraising last year's Giving Days raised on average **3.5x more** than those who did not.

# Key Dashboard Tools

## Donation Tools



Add Offline Donation



Manage Sponsor Matching



Manage Donations



Embed a Donate Button

## Get Prepared



Webinars and Workshops



Giving Day Toolkit



GGChat

## Other Actions



Engagement Opportunities



Add External Fund



Manage Support Areas



View Registration Info



View Your Profile

## Share Your Page


<https://www.401gives.org/organizations/center-for-media>





# 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/>



# A Completed Profile



## Logan's Pups

DONATE

FUNDRAISE

10%

\$995 Raised \$10,000 Goal 6 Donors



\$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*

CHOOSE YOUR OWN AMOUNT





# What's Next?



# Step Up Your Fundraising with Matches

**Use pledged donations as a donor incentive to increase impact!**

Once you secure a matching gift, utilize GiveGab's matching tool to add that money into your totals, according to the criteria you set.

- 1:1, 2:1, 3:1 Dollar-for-Dollar Matches
- Donor or Dollar Challenges
- **Pro Tip:** Watch the [Matching Training Video](#)

# Did you know?



Organizations who had a match last year during Giving Days raised on average **4.5x more** than those who did not.

# Your Nonprofit Toolkit

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

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



# Your Next Steps



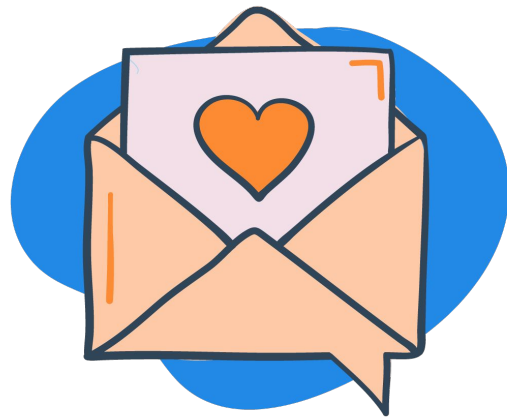
## Take a breath!

- 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
- Giving Day may not be the right fit for all of your donors - that's okay!

# Your Next Steps

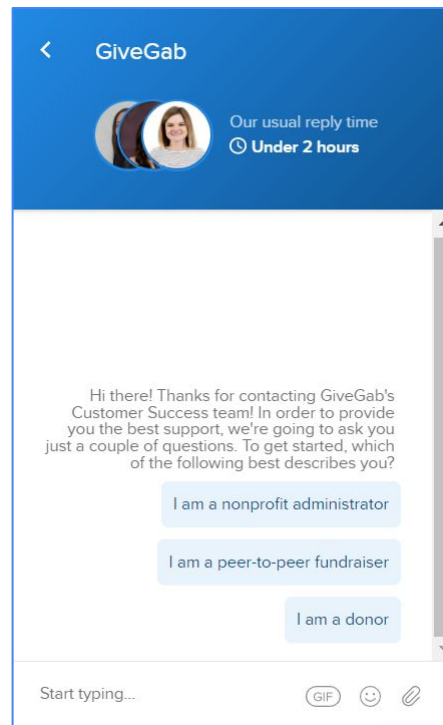
## What to work on over the next 2 month:

- Follow your Giving Day on Social Media and use your hashtag
- Watch your inbox for important emails
- Meet internally to discuss goals
- Sign up for upcoming webinars
- Explore the toolkit



# 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!

# Questions?