

# Getting Ready for HV Gives

*Wednesday - May 17, 2023*



**GiveGab**

# Meet the Team



**Amanda**

Associate Project  
Manager



**Merlin**

Project Manager

# Community Foundation of Orange & Sullivan Hudson Valley Gives

- History of how CFOS teamed up with GiveGab
- Role CFOS plays in this initiative
- The campaign has grown considerably since 2016
- 2023 numbers so far:
  - 67 organizations registered
  - Of those registered, 8 are new and the remaining 59 have participated before



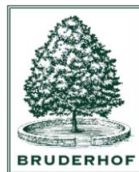
COMMUNITY  
FOUNDATION  
— of —  
ORANGE and SULLIVAN

# 2023 HV Gives Sponsors



**Garnet Health.**

**COOMBE BENDER  
& COMPANY**



**William A. Smith & Son Insurance**



# 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



**GiveGab**

- **HV Gives Overview**
- **Who is GiveGab?**
- **What's New**
- **Registering**
- **Creating Your Profile**
- **Next Steps & Questions**

# 2022 Results



Thank You for Giving Back, Giving Together and  
Giving More!

## Outcomes & Results

\$619,327

Raised

3,569

Donors

164

Organizations

# HV Gives Overview

[www.hvgives.org](https://www.hvgives.org) | May 17, 2023 | 12AM - 11:59PM

- Early Bird Registration closes: March 18th
- Every nonprofit conducts their own unique campaign to market and share with their supporters
- IRS-recognized nonprofit serving Hudson Valley Area are eligible to participate
- Your marketing efforts + CFOS Efforts = Exponential visibility
- Leaderboards for friendly competition, prize incentives
- Donations open on May 1 - May 31, 2023



# 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 + CFOS 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/ GiveGab?

GiveGab



# Who is Bonterra/GiveGab?



**GiveGab**

**GiveGab's mission is to make it incredibly easy for fundraising professionals to be great at their jobs!**

- Host a secure, reliable and transparent platform for HV Gives
- 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

- **Credit Card, ACH, Mobile Pay** for online transactions
- Donors can cover all fees on behalf of your organization
- In 2022 90% of donations were covered by donors
- That means in 2022 it cost only \$0.83 cents per \$100 raised online!

**GiveGab**

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](#).

# Transparent Donations

## Credit Card:

3% Platform Fee  
+  
\$0.30 per transaction &  
2.5% transaction fee  
(Stripe)  
=  
**5.5% + \$0.30**

## ACH:

3% Platform Fee  
+  
\$3.00 flat bank fee  
=  
**3% + \$3.00**  
*\*\$100 minimum*



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



## DAY OF GIVING

Nickie,

Thank you so much for your contribution to our Giving Day! Your donation will help improve our community and the lives of hundreds of individuals throughout our area.

Thank you again!



You are PAW-sitively amazing! Thank you for your generous gift to Logan's Pups. We could not help dozens of dogs every day without you.

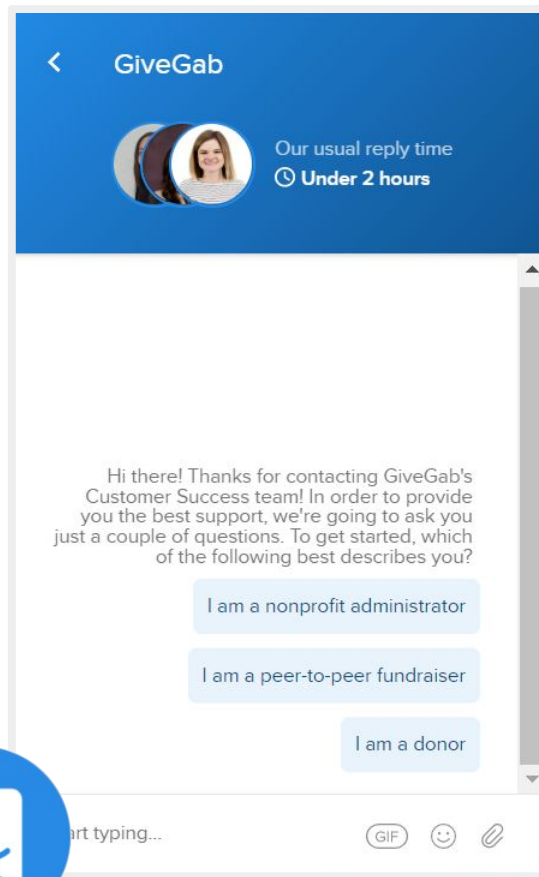
### Your donation receipt from Logan's Pups

Donor: Nickie Fredenburg  
Date: February 27, 2020  
Organization: Logan's Pups  
EIN: 12-1234567  
Designation: Giving Day  
Amount: \$10.00

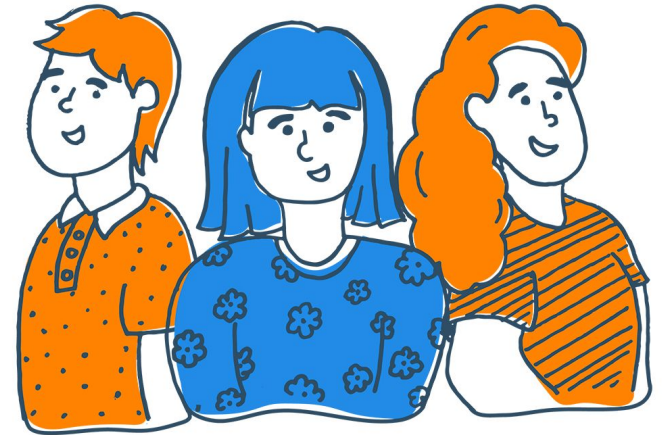
[View Your Donations](#)

# 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



# What's New for 2023?





# Share The Joy of Giving



- Supporters can purchase eCards to give to family, friends, coworkers in advance of the day
- The recipient will use to make a gift to their favorite nonprofit(s) when donations open
- Recipient selects “eCard” option during checkout
- Fees charged to the purchaser

# 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.

 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
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### Offline Stats

\$11,270.00 RAISED OFFLINE	10 OFFLINE DONORS	11 OFFLINE DONATIONS
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# New Search Experience

HUDSON VALLEY  
GIVES

LEADERBOARDS

▼ MENU



## Search

Search (e.g. SPCA, Food Bank)

[View All](#)

[Hide Filters](#)

Here are some participating organizations!



Support the Hudson Valley Gives host, the Community Foundation of Orange and Sullivan.

[CONTRIBUTE TO THE CFOS OPERATING BUDGET](#)



CFOS- The Record's People for People Fund

Middletown, New York

[VIEW](#)

[DONATE](#)



Stone Ridge Library Foundation

Stone Ridge, New York

[VIEW](#)

[DONATE](#)

## Filters

Select a Cause

Location (e.g. Hudson Valley,



## Stone Ridge Library Foundation

Stone Ridge, New York

\$25

\$50

\$100

[Custom Amount](#)

[ADD TO BASKET](#)


or

[CHECKOUT](#)


GiveGab

# 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!



# Registering for HV Gives





→ [CLICK HERE TO REGISTER](#) ←

Give where you live!

Wednesday, May 17, 2023






# Find Your Organization

and participate in Hudson Valley Gives

learning center at regina

1 Results



**The Learning Center at  
Regina Coeli**  
Hyde Park, New York

**PARTICIPATE**

## Don't see your organization listed?

You can create an organization by clicking the button below.

**ADD MY ORGANIZATION**

[Home](#)

[Apply Now](#)

[Follow us on Facebook](#)

[Follow us on Twitter](#)

Hudson Valley Gives





## Hudson Valley Gives

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

### Hudson Valley Gives

Continue





## Hudson Valley Gives

### Registration Type

☒ Early Bird Registration \$40.00

 [Do you have a coupon code?](#)

1. Your organization's contact name for HV Gives *\* required*

2. Your organization's contact email address for HV Gives *\* required*

3. Your organization's contact phone for HV Gives *\* required*

4. Are you a new or returning organization to HV Gives? (may not be needed?) *\* required*

Please select one choice.

5. **Where is your organization located, or where does it primarily offer services? \* required**

Please select one choice.

6. **What is your organization's monetary goal for HV Gives, if you have one? If you don't have a monetary goal, please list any other measurable goal (e.g. X# of new donors, etc.) \* required**

7. **There is a pool of cash and other prizes available to participating nonprofits for fundraising successes throughout the day. Will your organization develop a strategy around these prizes? \* required**

Please select one choice.

8. **How likely are you to seek a matching \* required**

Please select one choice.

9. **How likely are you to use the Peer-to-Peer fundraising strategy to raise money for your organization during HV Gives 2023? Peer-to-Peer fundraisers could include your staff, your board, your volunteers or committee members...anyone willing to ask their friends or colleagues for donations for your organization. On average, organizations that use Peer-to-Peer Fundraising raise 3.4 times more and gain four new donors. \* required**

Please select one choice.

10. **Does your organization plan to host any virtual events in conjunction with HV Gives 2023? \* required**

Please select one choice.

11. **If you are planning to host a virtual event in conjunction with HV Gives, please tell us more about it. \* required**

12. **Have you already and/or will you take part in online trainings provided by GiveGab in preparation for HV Gives 2023? (Be sure to check out additional resources on the "Nonprofit Toolkit" page) \* required**

Please select one choice.

13. **Are you or your organization following HV Gives on Social Media? \* required**

Please select one choice.

14. **Is your organization's annual budget below \$500,000? \* required**

Please select one choice.

15. **Do you have paid staff? \* required**

Please select one choice.

16. **I understand that this credit card information will be used for the purpose of my registration fee only. \* required**

Please select one choice.

### Credit Card Information

First Name

Last Name

Credit Card Info



Card number


MM / YY CVC

Submit




# Returning? Copy Your Profile


- **Don't forget to review and update your profile after!**
- Existing bank information will carry over
  - Double check that your bank account, org rep and admins on your profile are up to date!


**Hudson Valley Gives** Wednesday, May 17, 2023  
\$0.00 Raised • 0 Donors • 0 Gifts  
[Analytics](#)


**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.

 Hudson Valley Gives (2019) [Copy This Profile](#)

 Hudson Valley Gives (2021) [Copy This Profile](#)

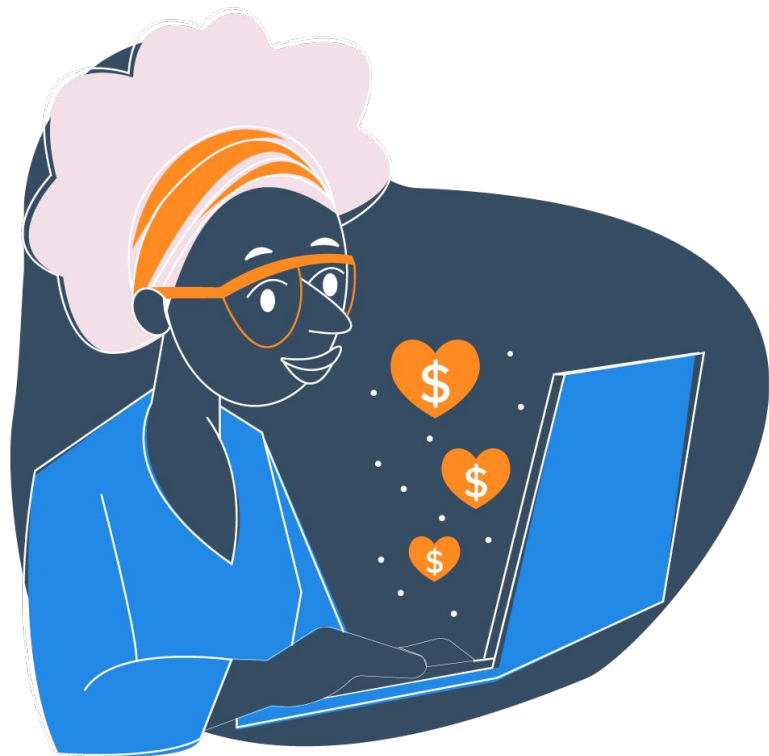
 Hudson Valley Gives (2020) [Copy This Profile](#)

 Hudson Valley Gives (2022) [Copy This Profile](#)

[Create a New 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



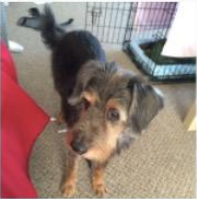
# Basic Info

- 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

**GiveGab**

- 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

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☰

☰

☰

...

## 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, I mean 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 on GiveGab

- 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 on GiveGab



## 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 on GiveGab

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.


# Suggest Donation Levels

 Add Donation Levels


We recommend having 3 or 4 donation levels.




**\$25.00**  
Provides one week of food for a senior pup  
[Edit](#) [Remove](#)



**\$50.00**  
Provides a super soft bed for a loving senior pup  
[Edit](#) [Remove](#)



**\$100.00**  
Helps a family foster one of our amazing senior pups  
[Edit](#) [Remove](#)



**\$500.00**  
Provides life changing surgery to a senior pup in need  
[Edit](#) [Remove](#)

Add Donation Level

- 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



# 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

GiveGab

 Add Fundraisers

 Download CSV

Add Fundraisers

Upload fundraisers

Message All

Fundraiser ▾

Donors ▾

Amount Raised ▾

Goal ▾

Email

Phone

Actions

No fundraisers found.

☒ Allow New Fundraisers to Sign Up

Set Fundraisers' Story

Set Fundraisers' Goal

\$

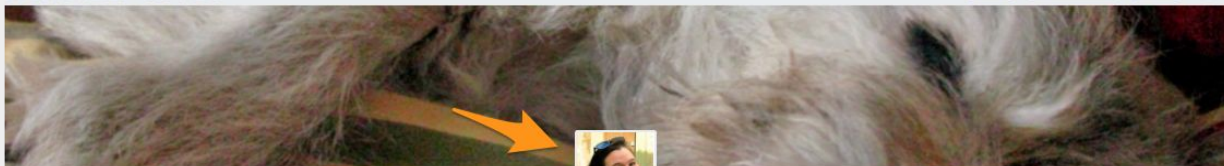
.00

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

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](#)



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?



**GiveGab**

Organizations who used P2P fundraising last year for HV Gives raised on average 3.5 times 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

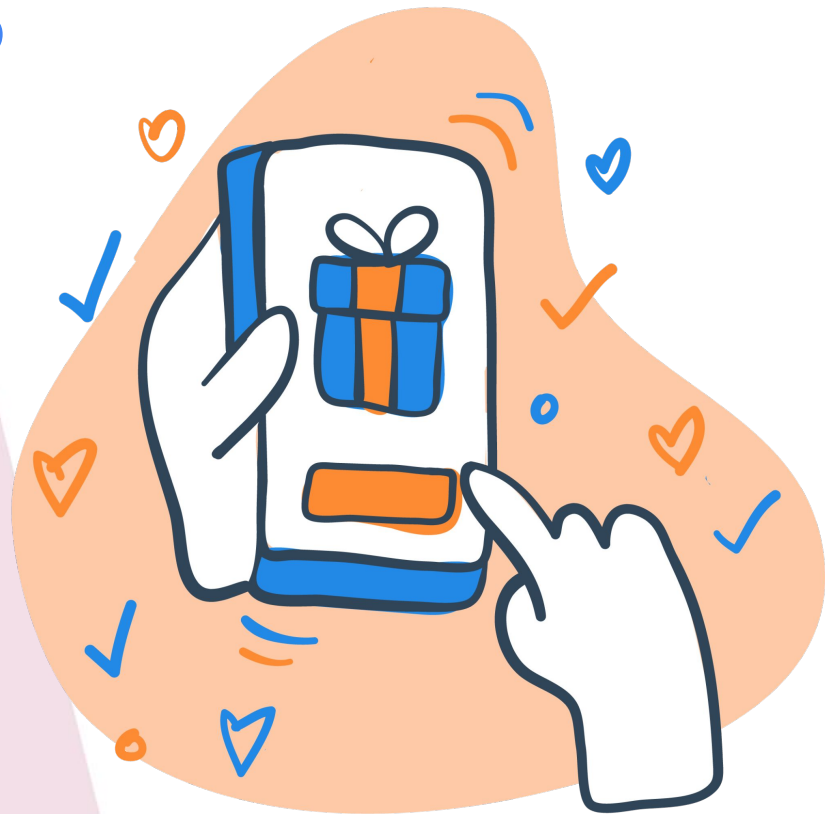
*Provides life changing surgery to a senior pup in need*

CHOOSE YOUR OWN AMOUNT





# What's Next?

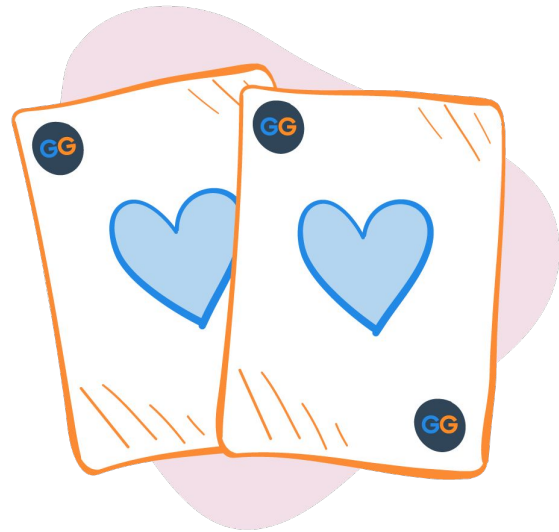


# Step Up Your Fundraising with Matches

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



# Did you know?



In 2022, organizations who had a match raised on average **6.9x more** than those who did not.

# Your Nonprofit Toolkit

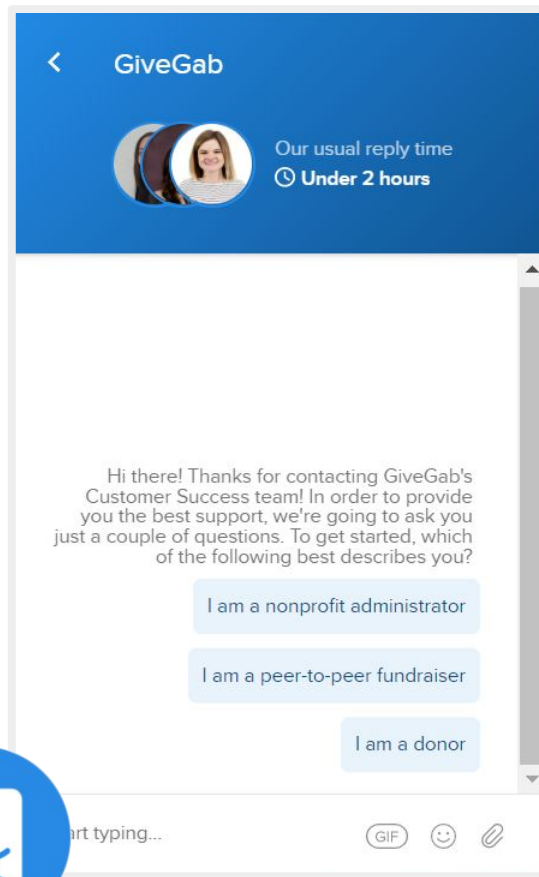
**The Nonprofit Toolkit has valuable resources for all your HV Gives needs.**

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



# How We Support You

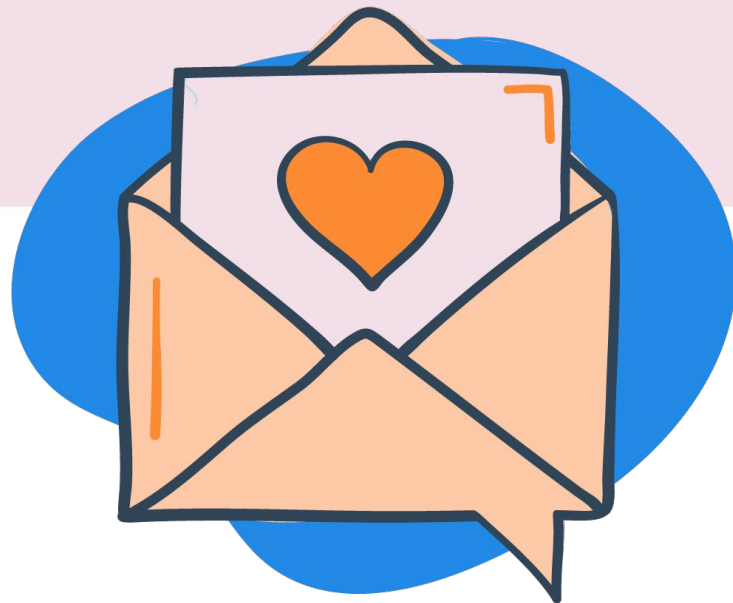
- Visit Our Help Center
  - [support.givegab.com](https://support.givegab.com)
- Check Out Our Blog
  - [givegab.com/blog](https://givegab.com/blog)
- Send us an Email
  - [CustomerSuccess@givegab.com](mailto:CustomerSuccess@givegab.com)
- Chat with GiveGab's Customer Success Team
  - Look for the little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



# Your Next Steps

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

- Follow HV Gives on Social Media and use #HVGives Hashtag
- Watch your inbox for important emails
- Meet internally to discuss goals
- Sign up for upcoming webinars and [office hours](#)
- Explore the toolkit



# Questions?



*Wednesday, May 17, 2023*