

# Final Steps to Success

*Wednesday - May 17, 2023*



# Meet the Team



**Amanda**

Associate Project  
Manager



**Emily**

Associate Project  
Manager

# 2023 HV Gives Sponsors



William A. Smith & Son Insurance



Building Better Communities With....



# Let's Celebrate!

- Local DJ entertainment
- Live prize giveaways
- Happy Hour Specials
- Swag available
- Continuous update of dollars raised

MAY 17

## HV GIVES CELEBRATION OF SUCCESS



Join us as we celebrate our fundraisers, donors, supporters and another great year of Hudson Valley Gives!

**Newburgh Brewing Co.**  
**88 South Colden Street**  
**Newburgh, NY 12550**  
**4PM - 7PM**

**INTERACT WITH THE OTHER HV GIVES PARTICIPANTS AND SEE  
LIVE PRIZE ACTION!**

# Submit Your Questions!

This is being recorded. The recording will be available on the /trainings page by **April 27th**.

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

The screenshot shows a chat box interface with a 'To:' label and a dropdown menu. The dropdown menu is open, showing two options: '✓ All panelists' (which is selected and highlighted in blue) and 'All panelists and attendees'.



## Q&A

The screenshot shows a Q&A form with a text input field containing the placeholder text 'Please input your question'. Below the input field, there is a checkbox labeled 'Send Anonymously' and a blue 'Send' button.

# Agenda



- **HV Gives Updates & Reminders**
- **Your Checklist for Success**
- **After HV Gives**
- **Next Steps**
- **Q&A**

# HV Gives Updates and Reminders



- [www.hvgives.org](https://www.hvgives.org) | May 17, 2023 | 12AM - 11:59PM
- Registration Closes: May 12, 2023 at 11:59 pm
- Donations Open: May 1, 2023 at 12:00 am
- Donation Close: May 31, 2023 at 12:00 am
- Prizes
- Social Media Feed



# 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 HV Gives 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

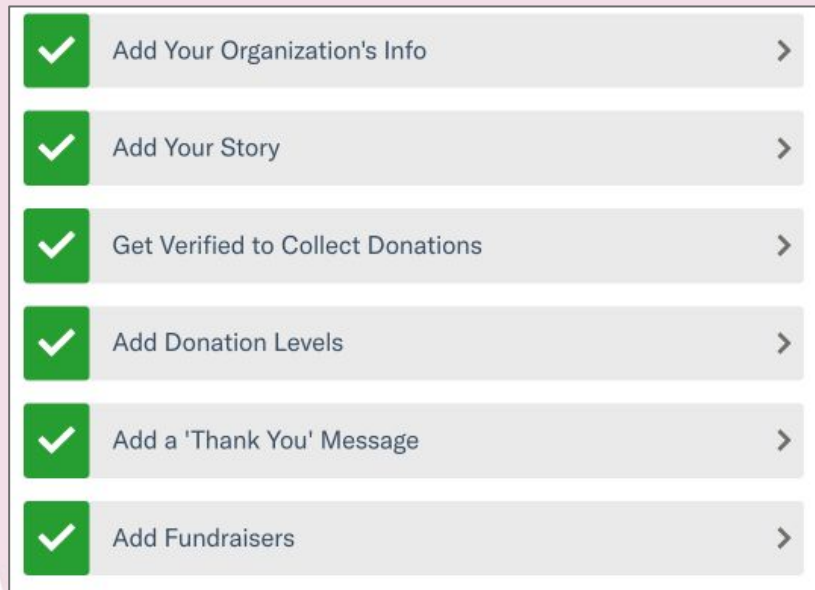


Embed a Donate Button

# 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?
- Set up matches/challenges?





## 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*



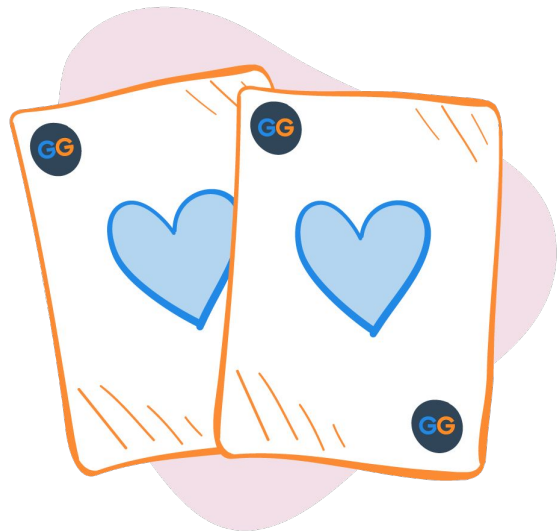
\$500

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

CHOOSE YOUR OWN AMOUNT



# Have you secured a matching gift?



- **Why?**
  - Organizations who set up a Match or Challenge for raise on average **4.5x** 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 your HV Gives profile
- ✓ Verify your match setup with GiveGab support
- ✓ Curate communications to highlight your match

# Do you have ambassadors?

- **Expand your organization's reach** by asking individuals to share your page
- Go one step further: Ask them to host their very own fundraising page (Peer-to-Peer)
- Anyone can be an ambassador or a fundraiser
- **Pro Tip:** Watch the Peer-to-Peer Fundraiser training video





# Setting Up For Success

- Set up a quick info session for Ambassadors and Peer-to-Peer Fundraisers
- Walk them through the **HV Gives Fundraiser Guide**
- Communicate your organization's goals
- Create a simple, suggested timeline for communications
- Provide them with the links they need to share out
- Walk P2P Fundraisers through creating their profile

# 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 HV Gives Nonprofit Toolkit



# How will you communicate?

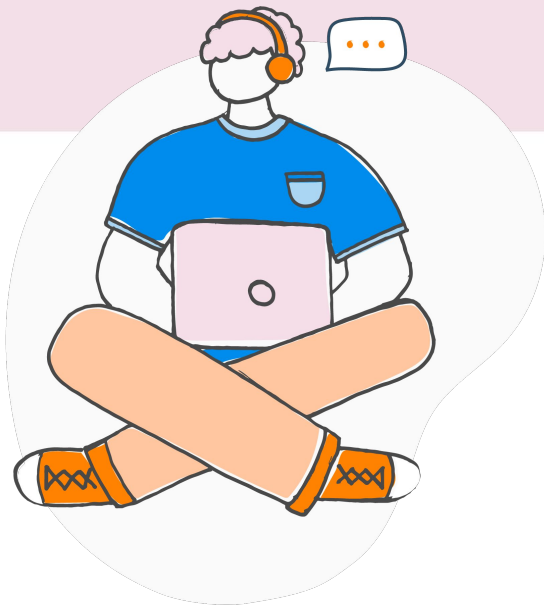


- Utilize multiple online channels
  - Social Media
  - Email and direct mail communications
- C.O.P.E. Create Once, Post Everywhere!
- Curate authentic visual content
- **Pro Tip:** Create QR codes for your profile

# Post-HV Gives Success

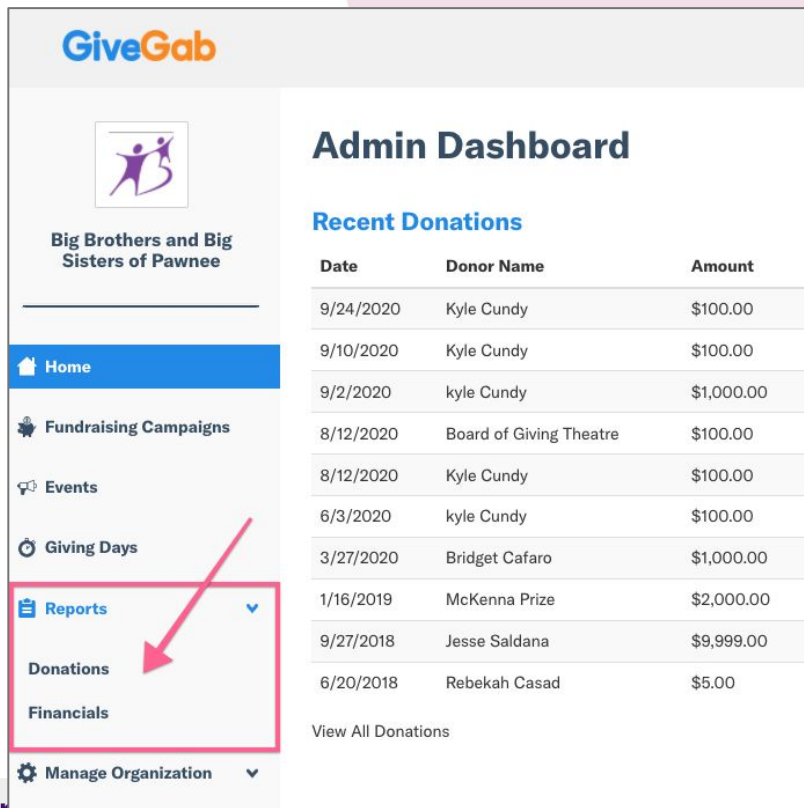
GiveGab is becoming  Bonterra.

# 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 “Stripe”
- 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 with a red box and arrow)
- Donations
- Financials
- Manage Organization


# Filtering Your Data




**Pawnee Public Library**


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 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>Page 2 of 2</div> <div> <a href="#">Export CSV</a> <a href="#">Edit Bank Account Info</a></div>				

Viewing Dashboard for **Pawnee Public Library** 

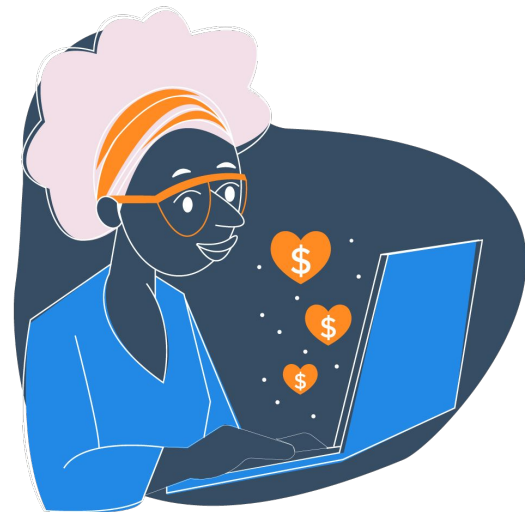
# Better Reconciliation

- 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	
<b>Balances</b>		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	

# 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
- HV Gives 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



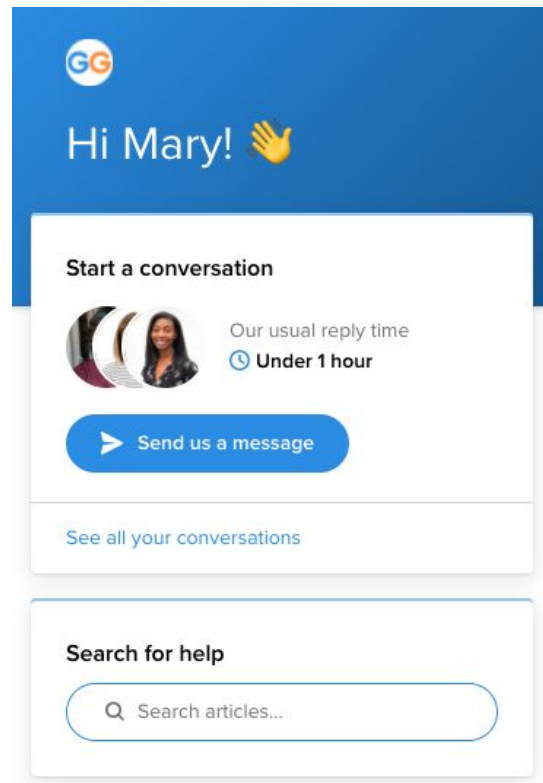
# Final Checklist


- Complete your profile ASAP
- Ensure you are verified to collect donations in GiveGab
- Keep an eye out for important emails!
- Follow HV Gives on Social Media and use #HVGives Hashtag
- Watch on-demand training course videos
- Check out the Nonprofit 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



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

# Questions?



*May 17, 2023*