

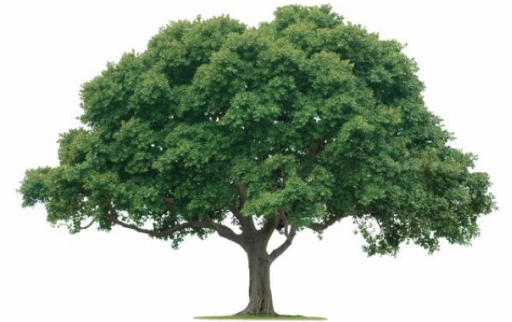
Final Steps to Success

Wednesday - May 15, 2024



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
- 2024 numbers so far:
 - 185 organizations registered
 - Of those registered, 40 are new and the remaining 145 have participated before



COMMUNITY
FOUNDATION

of

ORANGE and SULLIVAN

2024 HV Gives Sponsors



Building Better Communities With....



Catskills • Hudson Valley



Submit Your Questions!

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

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



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

HV Gives Updates and Reminders

www.hvgives.org | May 15, 2024 | 12AM - 11:59PM

- Registration Closes: April 30, 2024 at 11:59PM
- Donations Open: May 1, 2024 @ 12:00AM
- Donations Close: May 31, 2024 @ 12:00AM
- Leaderboards for friendly competition, prize incentives
- 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

Is Your Profile Complete?

Have you:

- Added your logo **and** a cover photo?
- Shared an authentic story?
- Set goals?
- Included clear calls to action?
- Added a 'Thank You' Message
- Featured visual content?
- Highlighted donation levels?
- Invited your fundraisers?



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

Is Your Profile Complete?

HUDSON VALLEY
— GIVES —

PRIZES ▼ MENU



**Hudson Valley Riverbank
Historic Sites and Museum**
Experience history...and more

Facebook X Instagram LinkedIn

CFOS-Hudson Valley Riverbank Historic Sites and Museum

DONATE FUNDRAISE

\$50 \$100 \$250 \$500

CHOOSE YOUR OWN AMOUNT

Our Story

Top Fundraisers

Our Story



In 1790 the U.S. Patent office was created. From 1790 until 1880 inventors were required to submit a working 12x12x12 inch model of their inventions along with their application. If approved, the model was given a tag with its patent number. It was tied on with a red strip. This where the phrase "red tape" comes from!

America was the only country with this requirement. The models are a physical history of the innovations that shaped the world. Many are still in use or are the origin of products we use today. Besides the stories they tell, the models are compelling as an exhibit in that they are works of art. Many were made by professional model makers.

Will You Have Cash/Check Donations?

- Add cash and check donations to your HV Gives totals beginning on May 1
- 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

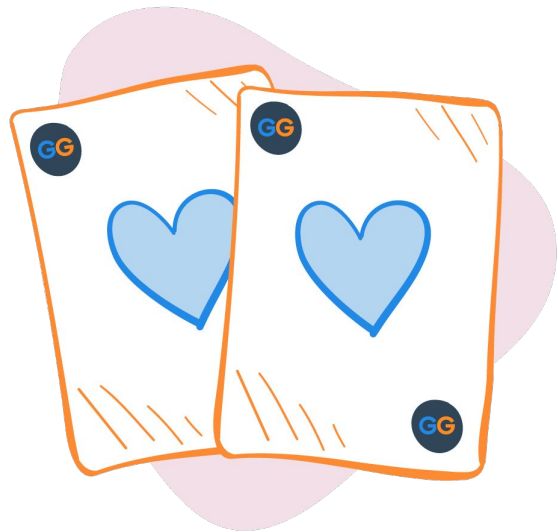


Manage Donations



Embed a Donate Button

Have You Secured a Matching Gift?



- **Why?**
 - Organizations with matching funds raise 4.5x more on average than organizations without a match
- 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 chat support
- ✓ Curate communications to highlight your match

Do You Have Fundraisers?

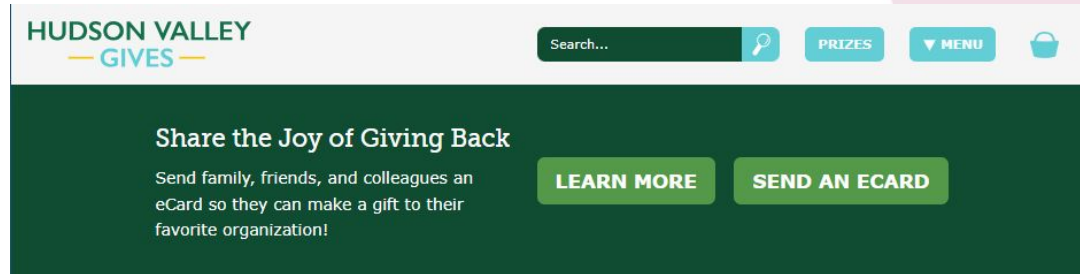
- **Expand your organization's reach** by asking individuals to share your page
- Go one step further: Ask them host their very own fundraising page (Peer-to-Peer)
- Anyone can be a fundraiser
- **Pro Tip:** Watch the Peer-to-Peer Fundraiser training video



Setting Up Your Fundraisers 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

HV Gives eCards



The screenshot shows the top navigation bar of the Hudson Valley Gives website. On the left is the logo "HUDSON VALLEY GIVES". To the right is a search bar with "Search..." and a magnifying glass icon, followed by "PRIZES", "MENU", and a shopping cart icon. Below the navigation bar is a dark green banner with the text "Share the Joy of Giving Back" and "Send family, friends, and colleagues an eCard so they can make a gift to their favorite organization!". Two green buttons, "LEARN MORE" and "SEND AN ECARD", are positioned to the right of the text.

- 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

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](#)



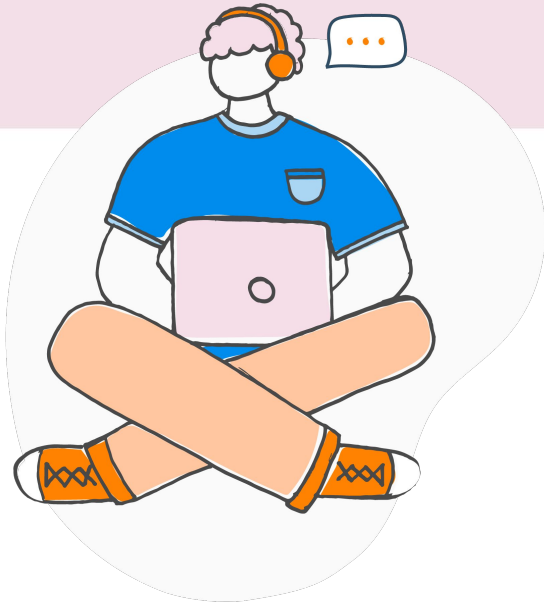
How Will You Communicate?



- 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

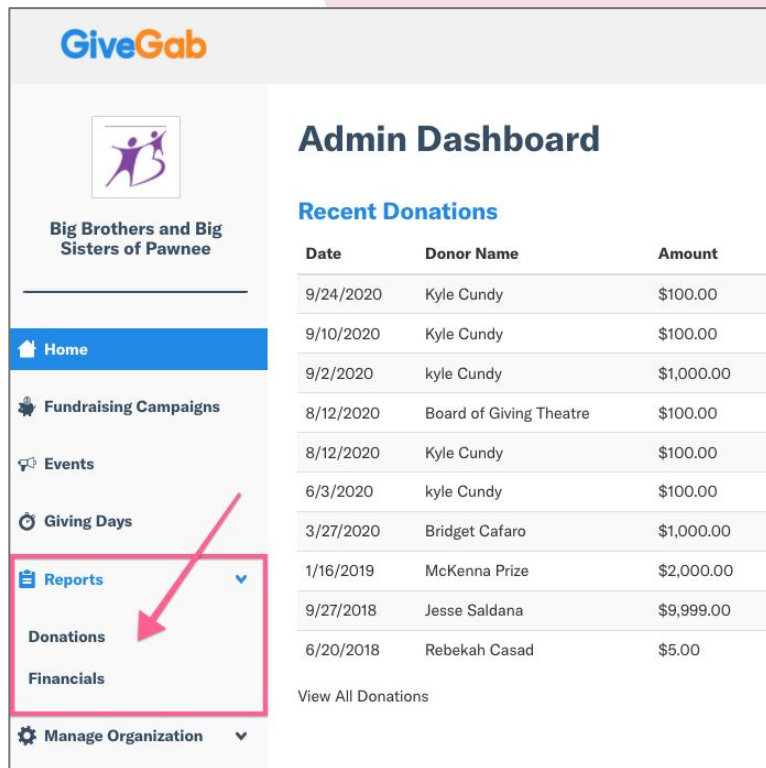
Post-HV Gives Success

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 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](#)

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

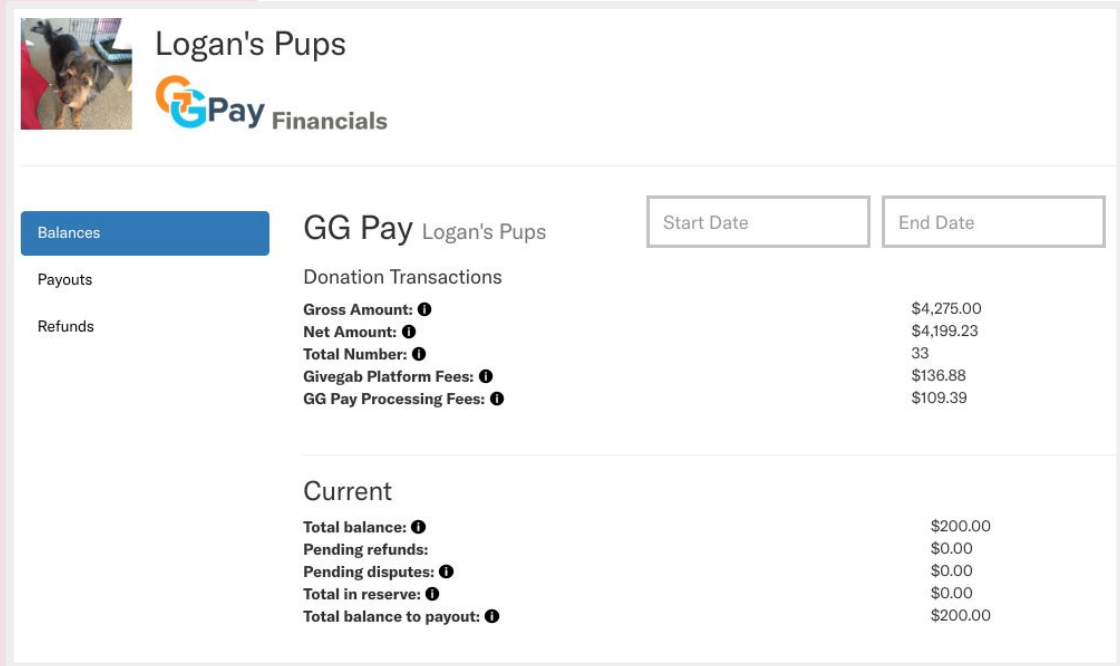
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 [Export CSV](#) [Edit Bank Account Info](#)

Viewing Dashboard for **Pawnee Public Library** 

Reconciliation

- The Financials reporting dashboard allows you to view your balance and donations from an accounting perspective
- Match each online gift to a deposit

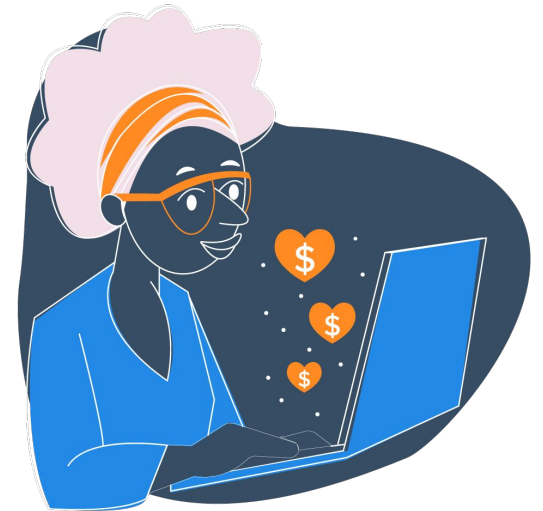


The screenshot displays the 'GG Pay' financials dashboard for 'Logan's Pups'. It includes a navigation menu on the left with options for Balances, Payouts, and Refunds. The main content area shows 'Donation Transactions' with a summary table and 'Current' balances.

GG Pay Logan's Pups		Start Date	End Date
Donation Transactions			
Gross Amount:	1		\$4,275.00
Net Amount:	1		\$4,199.23
Total Number:	1		33
Givegab Platform Fees:	1		\$136.88
GG Pay Processing Fees:	1		\$109.39
Current			
Total balance:	1		\$200.00
Pending refunds:			\$0.00
Pending disputes:	1		\$0.00
Total in reserve:	1		\$0.00
Total balance to payout:	1		\$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 Giving Day 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
- How-To Videos on the HV Gives Trainings page



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 by May 1
- Ensure you are verified to collect donations
- Keep an eye out for important emails!
- Follow HV Gives on Social Media and use the #HVGives Hashtag
- Watch on-demand training course videos
- Check out the [Nonprofit Toolkit](#)



How We Support You

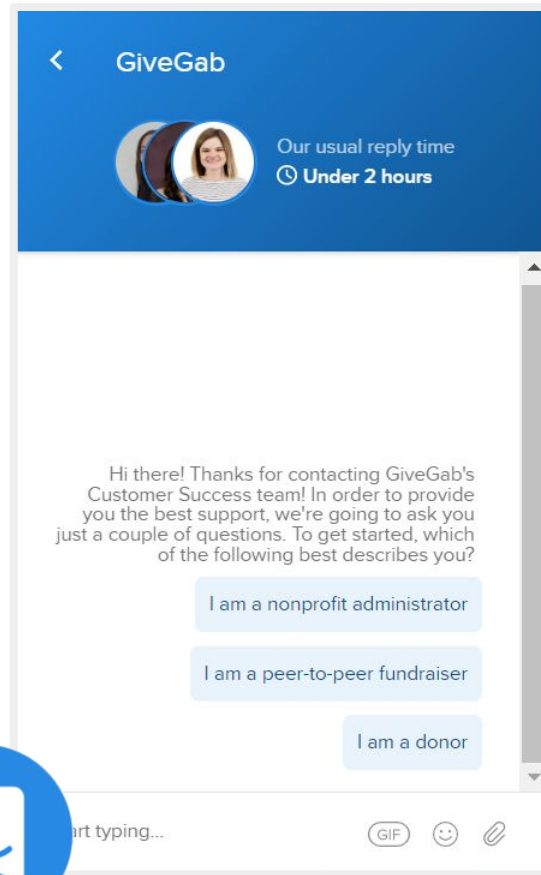
Visit our [Help Center](#)

Check out [Our Blog](#)

Send us an email at

CustomerSuccess@GiveGab.com

Chat with our Customer Success Team
Look for the little blue chat bubble



Questions?



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