



Office Hours: Session #2

Aug 11, 2pm CT

#iGiveCatholic Prayer

*O Lord, giver of life, we know that all we are,
and all we have are gifts from You.*

*We live in a world that celebrates consumption.
But You call us to be good stewards
of all You have entrusted to us.*

*May this #GivingTuesday prompt us
to gratitude and generosity,
that brings nourishment to the hungry
and hope to the hopeless.*

*We pray that #iGiveCatholic
may be a miracle of loaves and fishes,
where every gift shared lovingly
from a grateful heart
becomes bread for the multitudes,
and the ordinary becomes extraordinary.*

*In this giving and receiving, may our hearts rejoice
in You alone, who are Lord for ever and ever.*

Amen

Introductions



#iGiveCatholic

Julie Kenny

National Program Director

GiveGab Team

Laryssa Hebert

Senior Project Manager



Merlin Komenda

Project Coordinator



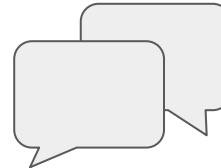
Molly Petrie

Customer Success Champion





Submit Your Questions!



Chat Box

To:

All panelists

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

- Reminders
- Managing & Approving Your Registrants
- What to expect with GiveGab's Verification Process
- What's Next?
- Open Q&A / Demo



#iGiveCatholic Updates & Reminders

- OSV Envelope - Supposed to ship week of 8/17 for arrival on or before 8/31. I will let you know when they are shipped.
- Organization webinar/training on 8/18. I forgot to include mention of this in the email template I sent you all yesterday. Remind orgs to register at <https://www.igivecatholic.org/info/trainings>.



#iGiveCatholic Updates & Reminders

- Donation Collection Decision for returning AND new organizations - **Overdue** (chat in here to confirm)
 - If we've reached out to collect bank info - do so by Wednesday, August 12
- Use updated #iGiveCatholic branding!
- Returning dioceses: Great news! You now have admin access to your organizations from last year, and organizations that register this year
- **New this year!** “Offline” Matching



Registration Reminders

- Registration opens on Monday, August 17
 - Returning AND new organizations need to register themselves
- [How to register support article](#) and email
- Helpful materials available for orgs in [Resources](#) Menu:
 - Communication Timeline (Step One-Getting Started)
 - Marketing Toolkit, logos, flyers, social media assets and more! (Step Four)
- Adding your contact information and text in landing page footer
- Registration closes Friday, October 30



Managing & Approving Your Registrants



Approval for Registration Applications

All organization that apply to participate in #iGiveCatholic will need to be approved within (5) business days

There are four different statuses available:

- **Pending** - This is the default setting for all organizations that have submitted their registration application.
- **In Review** - The organization's application is under your review (optional)
- **Approved** - Once you have determined that the organization is qualified to participate in #iGiveCatholic, changing their status to approved so they are visible on the #iGiveCatholic site
- **Ineligible** - Use this status when an organization does not qualify to participate in #iGiveCatholic



Approving Your Organizations



Giving Day Dashboard for

#iGiveCatholic

[View Site](#)

Organizations Donations Landing Pages Site Copy Prizes Sponsors Custom Pages Settings Registration More ▾

Search All Statuses ▾ Actions ▾

Organization	Actions	Status	Sign Up Date	GiveGab ID	EIN	Website	Causes	Administrator	Donatable	Customiz
Test Organization Demo Seminary		Pending ▾	7/9/2020	486092				Laryssa Hebert laryssa.hebert@givegab.com	No	No

Be sure to ‘Approve’ on a regular basis while registration is open, and that none remain ‘Pending’ before donations open on November 16!



Approval Status Messaging



Thank you for applying for participation in #iGiveCatholic! Your organization's registration for #iGiveCatholic 2020 beginning November 16 through #GivingTuesday, December 1, with the Diocese of [REDACTED] will be reviewed, and your status will show as Pending until the application has been approved by the arch/diocesan or foundation point person. This typically happens within five (5) business days. If additional information is needed to approve your organization, someone will let you know during the review process.

In the meantime, you may visit your profile at any time and start to customize your donation page prior to approval if you would like.

If you have any questions, please contact your arch/diocesan or foundation contact person, or use the "chat" bubble at igivecatholic.org for assistance.

Your registration info from #iGiveCatholic

Registered By: Laryssa Hebert
Ministry: Test Organization Demo Seminary

[Manage your #iGiveCatholic Profile](#)

Donation Status: Incomplete

 Please provide your organization's information and verify you can collect donations in your state [here](#).

Participation Approval Status

Pending

Thank you for applying for participation in #iGiveCatholic! Your application is under review, and your status will show as Pending until the application has been approved by the arch/diocesan or foundation point person. This typically happens within five (5) business days. If additional information is needed to approve your organization, someone will let you know during the review process.



What are some helpful things to know?

Returning Organizations:

- Only current administrators can register a returning org. That's to prevent fraudulent activity! If they are not administrators, they can request access during the registration process and complete their registration application once granted.
- Upon completing their registration, admins will be presented with the opportunity to copy a profile from previous Giving Days, or start from scratch.





What are some helpful things to know?

Be sure to take advantage of the information available in the **Analytics** tab of your Master Dashboard!

Organizations Donations Landing Pages Site Copy Prizes Sponsors Custom Pages Settings Registration More ▾

Search All Statuses ▾ Actions ▾

Organization	Actions	Status	Sign Up Date	GiveGab ID	EIN	Website	Causes	Administrator	Do	Do
Laryssa's Test Nonprofit		Pending ▾	8/4/2020	486416		link	Education	Laryssa Hebert laryssa.hebert@givegab.com	No	No
#iGC Communications Test		Pending ▾	7/22/2020	486192				Julie Kenny julie@igivecatholic.org	No	No
Test Organization		Approved ▾	7/14/2020	486131				Laryssa Hebert laryssa.hebert@givegab.com	No	No

- Leaderboards
- Peer-to-Peer Fundraisers
- Analytics**
- Matches
- Manage Admins



What are some helpful things to know?

Organizations Registered

600

400

200

0

25. May 1. Jun 8. Jun 15. Jun 22. Jun 29. Jun 6. Jul 13. Jul 20. Jul 27. Jul

Organizations Registered By Day

☰

100

80

60

40

20

0

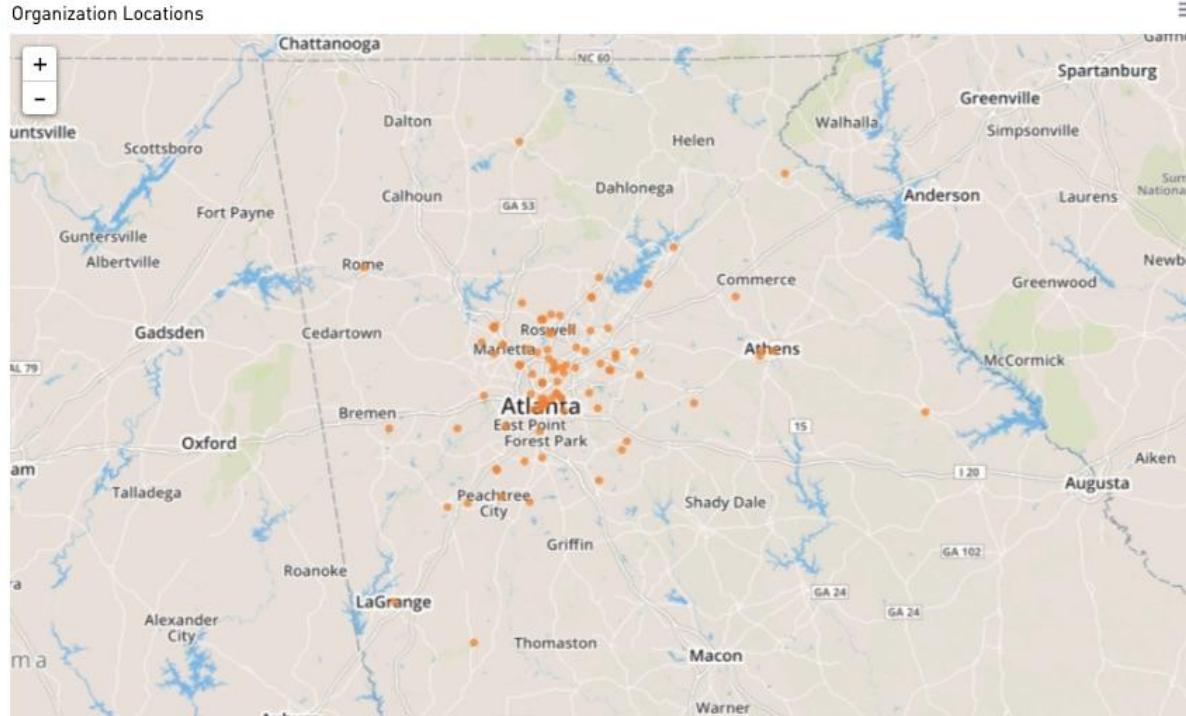
25. May 1. Jun 8. Jun 15. Jun 22. Jun 29. Jun 6. Jul 13. Jul 20. Jul 27. Jul

40

TUE, JUN 16, 2020



What are some helpful things to know?





Managing Your Participants

Organizations Donations Landing Pages Site Copy Prizes

Search All Statuses ▾ Actions ▾

Organization	Actions	Status	Sign Up Date
Laryssa's Test Nonprofit	X edit info gear	Pending ▾	8/4/2020
#IGC Communications Test	X edit info gear	Pending ▾	7/22/2020
Test Organization	X edit info gear	Approved ▾	7/14/2020

- Remove organizations
- Make a note
- View & Edit Registration Survey Answers
- *New!* Admin access to your participant pages



Verifying Participants to Collect Donations



GiveGab's Verification Process

- Separate from the application process, GiveGab will need to ensure that organizations can legally accept tax-deductible donations in the bank account provided (if not being collected via diocese)
- GiveGab will verify all new organizations, AND run returning organizations through an EIN ‘re-verification’ process (this is an annual requirement)
- GiveGab will communicate with those organizations’ administrators directly, and the message will vary based on which step of the process they’re in.



Verification Communications

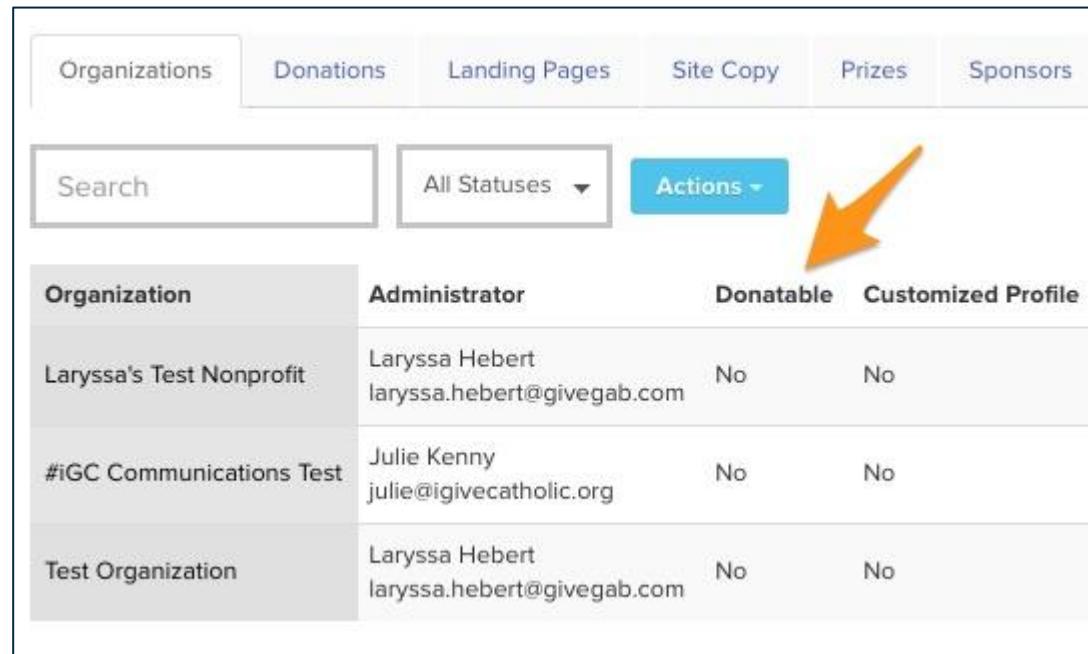
1. Add Bank Account (*starts after Labor Day*)
2. Provided Bank Information Could Not Be Verified by Stripe
3. EIN Could Not Be Verified
 - a. New Organizations
 - b. Returning Organizations

All communications are branded to #iGiveCatholic, and will come from
[“questions@igivecatholic.org”](mailto:questions@igivecatholic.org) -- our main support email.



Tips & Tricks for Verification

- You will have insight into which of your organizations have completed these steps!
- If you see that an organization is listed as a “No”, connect them with GiveGab! (*Unless you’re collecting donations for them, of course*)



Organization	Administrator	Donatable	Customized Profile
Laryssa's Test Nonprofit	Laryssa Hebert laryssa.hebert@givegab.com	No	No
#IGC Communications Test	Julie Kenny julie@igivecatholic.org	No	No
Test Organization	Laryssa Hebert laryssa.hebert@givegab.com	No	No



Tips & Tricks for Verification

- [!\[\]\(da0e4193af27a672ce1097742a0c5ae3_img.jpg\) Add Your Organization's Info
Let people know who you are.](#)
- [!\[\]\(a37f76d95d86d074ec88e2a0e6ed24c0_img.jpg\) Add Your Story
Tell potential donors why they should contribute.](#)
- [!\[\]\(0c8eaaba83699fa00f1baa4191f85455_img.jpg\) Get Verified to Collect Donations
Set up your banking information to receive secure online donations.](#)
- [!\[\]\(8b86ea509bf54a24060db64a82ed82ce_img.jpg\) Add Donation Levels
Show your donors the impact their donation makes.](#)
- [!\[\]\(adff6523c7990decd507859dcc13f5b4_img.jpg\) Add a 'Thank You' Message
Personalize your auto-response for donors ahead of time.](#)
- [!\[\]\(dbf3d94edbc807cf9bcba4567a39e794_img.jpg\) Add Fundraisers
Recruit peer-to-peer fundraisers to expand your network of donors.](#)

Note: If a portion of your organizations will route their funds to your diocese - we can't turn the prompt on their dashboards off on a group-by-group basis. Let them know to skip this section!



What's Next?



Coming Up: September Office Hours

- Profile Completion Demo & Strategy
- Support Areas - *New this year!*
- Matches & P2P Fundraising
 - *New this year! Offline donations can be included in Matches*
- Initial Prizes Discussion

The screenshot shows the Bakersfield High School GiveBigKern page. At the top, it displays a progress bar at 90%, \$24,135 Raised towards a \$26,900 Goal, and 266 Donors. Below this, there are four donation amount options: \$5, \$25, \$50, and \$100, each accompanied by a small image related to the school. A "CHOOSE YOUR OWN AMOUNT" button is also present. On the left, there's a video thumbnail for "BHS Give Big Kern - Give Like It's a Fiesta!" from B, showing a large blue "BHS" sign on a concrete wall. To the right, a red box highlights the "Fundraising Campaigns" section, which includes links for "Driller Class of 2020", "Driller Library", and "Bakersfield High Virtual Enterprise". A pink arrow points from the bottom right towards this highlighted area.

Bakersfield High School

Once a Driller, Always a Driller!

Causes: Education, Youth, Health and Wellness

90%

\$24,135 Raised \$26,900 Goal 266 Donors

\$5 \$25 \$50 \$100

CHOOSE YOUR OWN AMOUNT

BHS Give Big Kern - Give Like It's a Fiesta! from B

03:55

vimeo

#GIVEBIGKERN will fund all the EXTRAS that enhance BHS programs and make them #1 for teens. Support the BHS students and their activities on this page or choose a favorite BHS organization by finding their individual #GiveBigKern campaign link on this page.

The Arts: Choir, Band, Drama, Culinary, Fashion, Yearbook

Fundraising Campaigns

Driller Class of 2020

Driller Library

Bakersfield High Virtual Enterprise

See More



What's Next?

- Incoming communications - #iGiveCatholic team / GiveGab Project Management Team
 - Central Routing setup
- Custom [#iGiveCatholic Trainings](#) - coming soon! Share with organizations
- [Sign up](#) for the next office hours session & share Live 'Getting Ready' Webinar registration link (next Tuesday, August 18)
- Review the timeline available on the [Diocesan Resource Portal](#)
- Find archived Kickoff and Office Hour webinars on the [Diocesan Resource Portal](#)



Need assistance?

- Technical, site and platform-specific, etc:
questions@igivecatholic.org
- #iGiveCatholic questions:
julie@igivecatholic.org

The screenshot shows a support interface with a teal header. It features a 'GG' logo, a greeting 'Hi there' with a yellow hand icon, and a message 'We'd love to hear from you!'. Below this is a white box for messaging, with a 'Leave us a message' button and a 'Back in 30m' link. It includes five user profile pictures and a 'New message' button. Below this is another white box for self-help, titled 'Find an answer yourself', with a search bar containing 'Search for articles...' and a blue search icon.



Questions?



Q&A

Q:Do we just use our normal password to get into our orginizations dashboard as an administrator?

A:That's a great question! Yes, you can just log in and go to your Master Dashboard, from your master dashboard you can access all of the organization's admin dashboards :)

Q: I am not seeing my organizations. When i go to my landing page and search for organizations, it says ... no ministries

A: Not to worry that's because no one has registered for 2020 yet. Once organizations apply to participate, you will see them on the dashboard under "Organizations". Laryssa will be showing this in a moment, I think.

Q:Should we have our own contact information in the footer, or should donors be directed to givegab for technical help?

A:You can copy the language at the bottom of the National Ministries page directing people to the chat bubble if they have a technical question, but you should have your information if they have a question related to participation with your Diocese.



Q&A

Q:Hi, do we get a prompt email or notification if we have a new organization registering that needs approval, or should we just check on a regular basis? Thanks!

A:You will need to check on a regular basis. For example, I plan to make this part of my 'first thing in the morning' process.

Q:Is the messaging of the approvals standard from GiveGab or can it be customized?

A:The approval message is standard but has been branded for #iGiveCatholic, and it will include your specific Arch/diocese in the messaging :)

Q:I was just wondering if [an organization] is denied [marked as ineligible, what it would say...

A:Thanks for asking! The ineligible message will read as follows: "*We regret to inform you that your organization is ineligible to participate in #iGiveCatholic 2020 at this time. Please contact your arch/diocesan or foundation contact person for more information.*"



Q&A

Q: Apologies if I missed it, but would you mind reviewing how the system knows if someone is a new admin who needs to request access? Just wondering about the flow from clicking "Participate" next to the org's name to the "Request Access" screen.

A: No problem! Since a user will need to be logged in to our system to register for a giving day, our platform can detect whether or not a user has admin access. If the individual is not an admin that's when they will be prompted to request admin access from one of the current administrators who will be listed on that same page. Does that fully answer your question?

Q: Thanks! I guess that's where I'm hung up -- do you have to be logged in to click "Apply Now" and "Search" for your org? Or does the logging in occur after you click "Participate"?

A: You don't need to be logged in to click "Apply Now" or to Search for your organization but as soon as you click "Participate" you will be prompted to log in - or if you have never logged in to our platform before you will be prompted to request admin access.

Q: I can't find last year's dashboard, not sure where to look.

A: Go into your 2020 Dashboard, and at the top it will say Richmond2020. Change it to say ...Richmond 2019.



Q&A

Q: Will I have time to add a new administrator before the organization gets the registration invite? I'm thinking of staffing changes since last year...

A: Yes! If you are aware of staff changes and you need to add an administrator you can go to your 2019 master dashboard and find the organization(s) that needs a new administrator added. If you would like specific instructions on how to do this please don't hesitate to write into the chat - we'll be happy to walk you through these steps :)

Q: Where would we put in matching donations at the participating organization level versus at the diocesan level?

A: Great question! If an organization has a match that they would like to add they can do so from their #iGiveCatholic dashboard, from the organization profile. If it is a Diocesan wide match you will want to go to your Master Dashboard and under the tab that reads "More" click on the "Matches" option. This will take you to a page that allows you to add a match or challenge

Q: Should we try to change the "current admins" to what we know to be correct so they can register?

A: Yes, if you have the time to update your admins I'd encourage you to go ahead and do that, as it will streamline registration for those individuals. To update admins you will want to go to your 2019 dashboard at [www.givegab.com/giving_days/igc-\[DIOCESE\]2019](http://www.givegab.com/giving_days/igc-[DIOCESE]2019).



Q&A

Q:i've learned that adding a new administrator triggers a GiveGab email to this new admin. But does revoking administrator access for an existing admin also trigger a GiveGab email notification to them?

A:Great question! If an admin's rights are revoked then they won't be notified of this.

Q:Question about the organization dashboard - there were major problems last year with administrators clicking on the wrong GiveGab button - instead of going into their iGC profile, they were going to a general GiveGab profile. Has there been anything done to prevent that this year?

A:Yes there has! In fact we completely removed that button so as to avoid donor confusion this year. We have also been working to monitor campaigns that are created so if an organization accidentally creates a campaign or event instead of registering for the actual #iGiveCatholic giving day then we will be notified about that as well.