

Final Steps to Success

April 30, 2024



Meet the Team



Ashley Rogers

Associate Project
Manager



Danielle Hunter

Project Manager

Submit Your Questions!

This is being recorded. The recording will be available on the /trainings page by the end of the day.

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

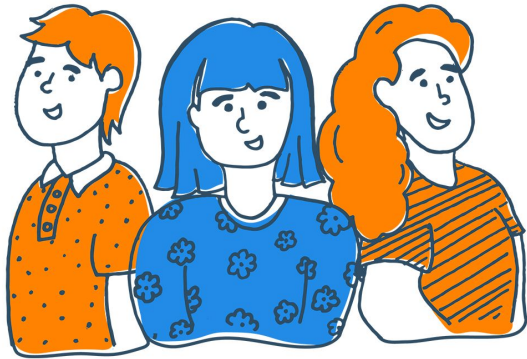
Send Anonymously

Agenda



- **209Gives Updates & Reminders**
- **Your Checklist for Success**
- **After 209Gives**
- **Next Steps**
- **Q&A**

209Gives Updates and Reminders



- **209gives.org** | April 30 12 AM - 12AM
- Social Media Feed
 - Downloads
- Register!

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 209Gives 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

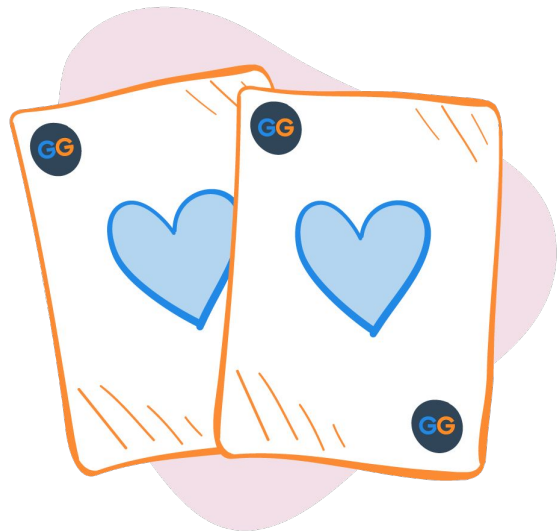
Is your profile complete?

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?



Have you secured a matching gift?



- **Why?**
 - Organizations who set up a Match or Challenge for 209Gives raised on average **8x** 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

Matches and Challenges Resources

[What are Matches and Challenges?](#)

[How do I add a Matching Opportunity to my Giving Day profile?](#)

[How do I add a Challenge to my Giving Day profile?](#)



Important Tips

- A Match or Challenge will remain active for the entire length of the set date and time parameters
- If you did not meet the amount necessary to deplete the match, but wish to release the entire sponsored amount, select “Deplete Match”
- When you no longer wish to display your match or challenge, select the “Archive” checkbox within the match or challenge editor

Matches Challenges





+ Add Match

Board of Directors Match

Sponsored by **Sample Food Bank's Board**

| Total Amount | Amount Remaining | ✓ Auto-Matching Enabled |
|-------------------|------------------|-------------------------|
| \$5,000.00 | \$850.00 | |

Sample Food Bank's Board has so generously donated \$...

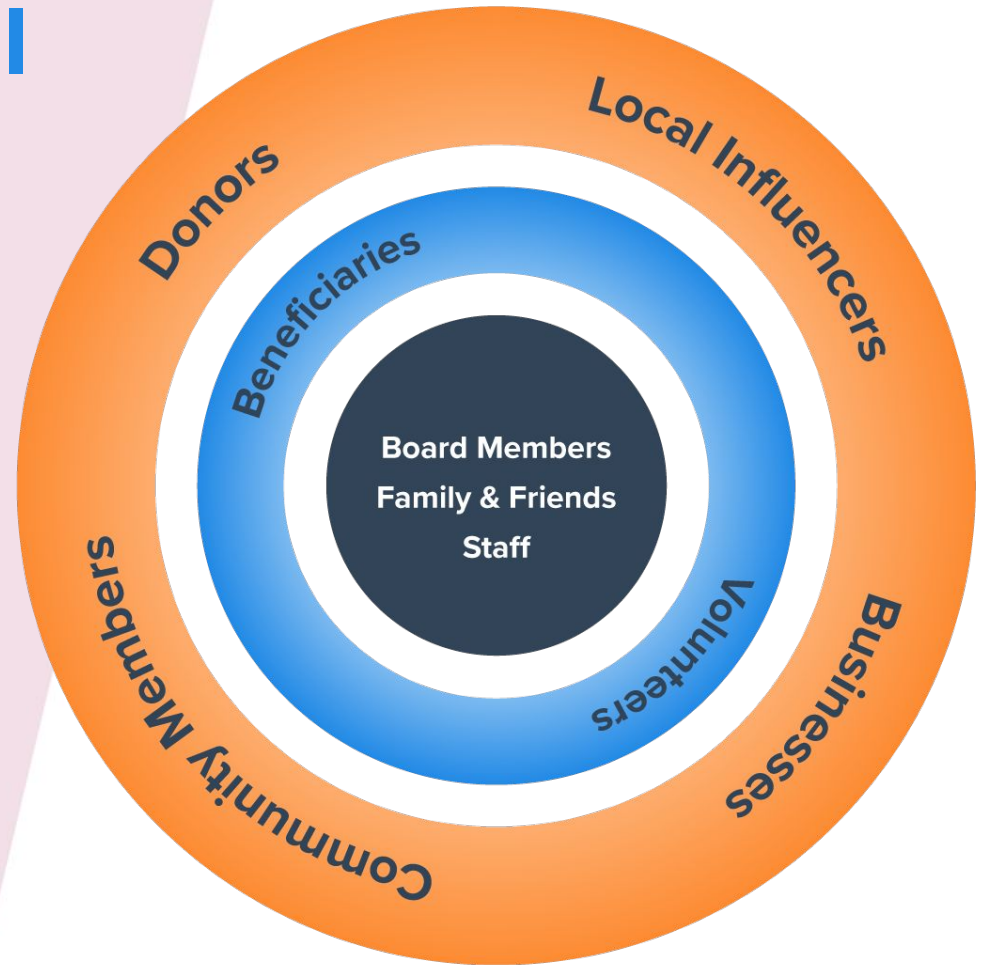
 Edit  Archive  Remove  Deplete Match

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 an ambassador or a fundraiser
- **Pro Tip:** Watch the Peer-to-Peer Fundraiser training video



Identify Potential Fundraisers



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 209Gives Nonprofit Toolkit



How will you communicate?

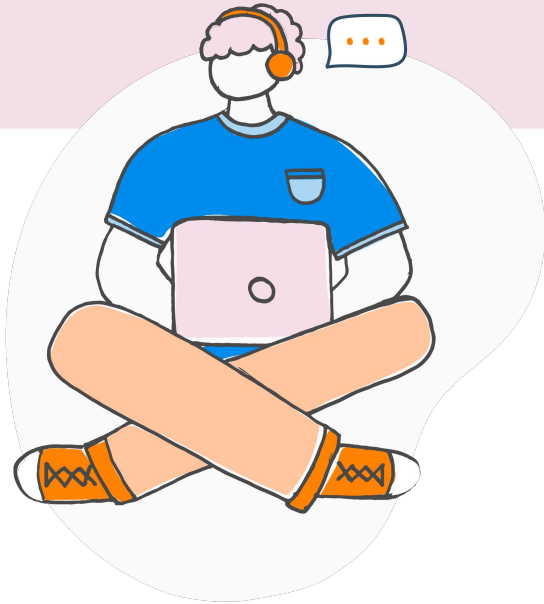


- Utilize multiple online channels
 - Social Media
 - Email and direct mail communications
- C.O.P.E. Create Once, Post Everywhere!
- Curate authentic visual content
- **Pro Tip:** Create QR codes for your profile

Post-209 Gives Success

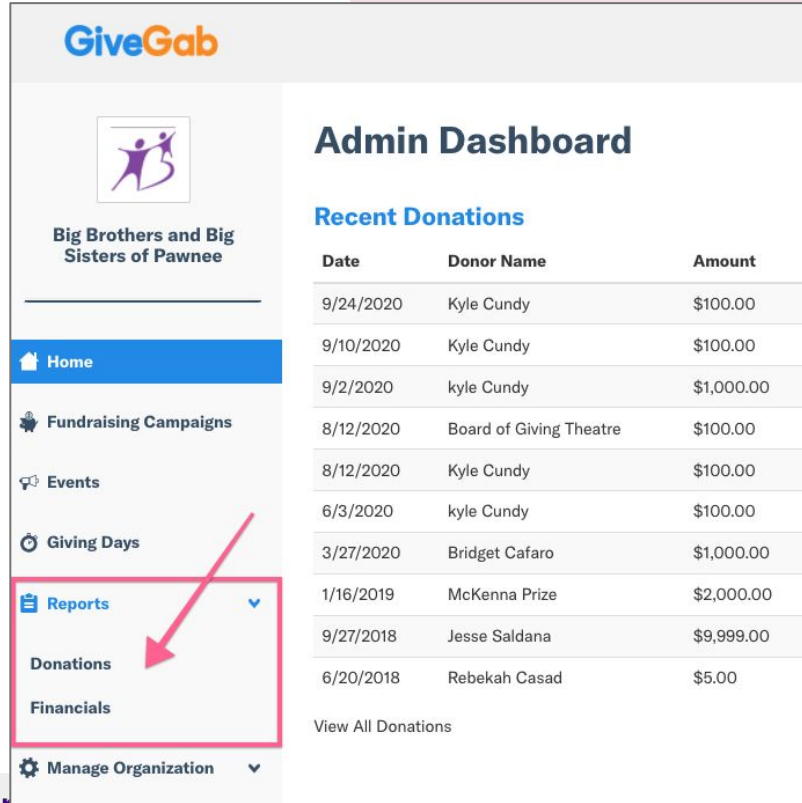
GiveGab is becoming  Bonterra.

How will you get your donations?



- Donations will be deposited on a 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](#)


GiveGab is becoming  Bontena.


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 |

  Page 2 of 2

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

Viewing Dashboard for **Pawnee Public Library** 

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
- 209Gives Downloadable Graphics
- Resources for Board Members and P2P Fundraisers
- Blog Articles and How-To Videos from GiveGab



Final Checklist

- Complete your profile ASAP
- Ensure you are verified to collect donations in GiveGab
- Keep an eye out for important emails!
- Follow 209Gives on Social Media and use #209Gives Hashtag
- Watch on-demand training course videos
- Check out the Nonprofit Toolkit

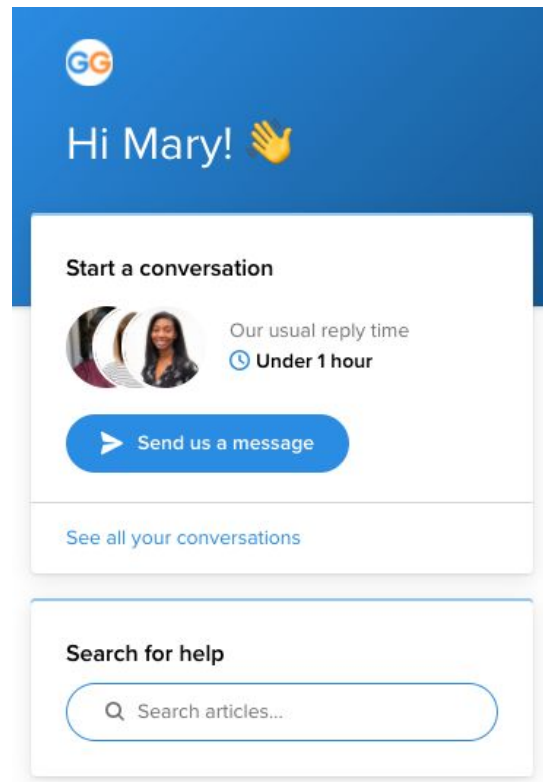



Key Takeaways

- 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

How We Support You

- Visit Our Help Center
 - support.givegab.com
- Check Out Our Blog
 - givegab.com/blog
- Send us an Email
 - 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?



April 18, 2023