Getting Ready for ExtraGive



Meet the Team









Kaitie Branton

Bonterra

Project Manager

Bonterra.

Nickie Fredenburg Bonterra Project Manager

Tracy Cutler

LancFound

Executive Vice President **Kim Shorter** LancFound Chief Operating Officer

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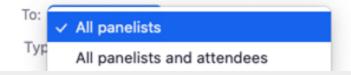
Submit Your Questions!

This presentation is being recorded. The recording will be available on the Trainings page by August 8.

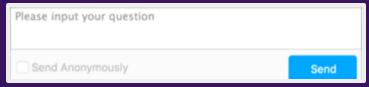
If you have questions or comments throughout our training, please write in using your Zoom webinar attendee panel.

Introduce yourself! Name, location, organization.

Chat Box



Q&A



Agenda

ExtraGive Overview

Who is Bonterra?

What's New

Registering

Creating Your Profile

Next Steps & Questions





2023 Results





ExtraGive Overview

ExtraGive.org | November 22, 2024 12:00AM - 11:59PM EST

- Every Community Benefit Organization conducts their own unique campaign to market and share with their supporters
- Your marketing efforts + Lancaster County Community Foundation = Exponential visibility
- IRS-recognized 501(c)(3) nonprofit serving Lancaster County are eligible to participate
- Leaderboards for friendly competition, prize incentives



Key Dates

ExtraGive Info Session: July 11 | 12:00PM 🗹

Getting Ready webinar: August 7 | 12:00PM 🗹

Fundraising Champions Webinar: September 4 | 12:00PM

Early Bird Application Deadline: September 10

Registration ends: October 15

Final Steps webinar: November 6 | 12:00PM

The big day: November 22

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 + LCCF marketing = exponential visibility for all organizations
- Utilize ExtraGive to reach other internal goals
- Motivate donors to make a greater impact with prizes and match incentives



Who is Bonterra?



We build technology to power those who power social impact

- Host a secure, reliable and transparent platform for ExtraGive
- Create the ultimate donor experience
- Provide a dedicated support team



Donation Security

- Partnered with Stripe PCI Level 1 Payment Processor for donation processing
- LCCF will be distributing donations and prize funds via direct deposit about 60 days post event
- Your banking information is reviewed by Stripe
- Donor credit card information is not revealed or saved in Bonterra or LCCF
- All participating organizations verified as IRS and staterecognized Community Benefit Organizations







Simple Donation Processing



- All major credit cards accepted
- Log right into your bank to use Plaid/ACH payment
- Quick, easy and fun donation flow
- Securely processed through Stripe
- Bonterra's chat support available right within the

donation form for your supporters

Transparent Donations

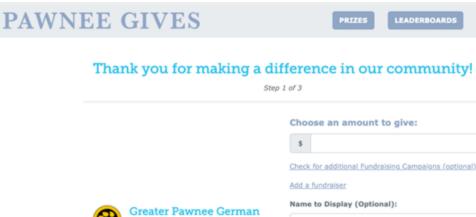
- Credit Card, Mobile Pay for online transactions
- Donors can cover all fees on behalf of your organization
- 4.99% fee per online transaction
- In 2023, 89.4% of gifts had fees covered!

| | +50.00 | |
|------------------------------------|---------------------------------|--|
| YMCA of South Collier | Gift: \$50.00 | |
| Email: | laryssa@givegab.com | |
| Fees: | \$3.13 | |
| What's with these fees? | | |
| ki cover the fees! | | |
| Privacy Option(s) | | |
| Please do not display a name publi | cly. | |
| Please do not display the donation | amount publicly. | |
| Hide my name from this organizati | on and the public. ⁹ | |
| Total: | \$53.13 | |
| ACK | SUBM | |
| Securely proc | essed with: | |
| SSL 256 Bit Enc | ryption reCAPTCHA | |



Gift Basket

The Gift Basket feature makes it easy for donors to support as many causes as they'd like!



Shepherd Rescue

(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

🜗 Bonterra.

V MENU

Instant Donor Delight

- Customizable Thank You Emails
 - Add your own text, photo, or video!
- Sent immediately after the gift is made
- Acknowledges their tax-deductible donation

DAY OF GIVING

Nickle,

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-allively 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: Pebruary 27, 2020 Organization: Logan's Pups EIN: 12-1234567 Designation: Giving Day Amount: \$10.00

> > View Your Donations

Giving Day Analytics



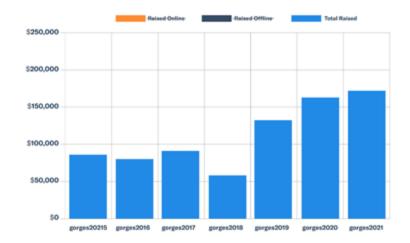
Key stats are available for the following data points:

- 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

| IN IZ | To Pawnee Gives Dashboard | | |
|--|---|-----------------------|-------------------------|
| Logan's Pups | Analytics for Pawnee | Gives | |
| 🖀 Home | Overall Stats Total Stats | | |
| Fundraising Campaigns | | | |
| ⊊∂ Events | \$15,115.00 TOTAL RAISED | 26 TOTAL DONORS | 42 TOTAL DOMATIONS |
| ♥ Amplify Austin | | | |
| Philanthropy Hub Site | Online Stats | | |
| Ithaca Philanthropy Hub Giving Days | \$3,845.00 RAISED CONLINE | 16 ONLINE DONORS o | 31 ONLINE DOMATIONS |
| 🛱 Reports 🗸 👻 | Offline Stats | | |
| Manage Organization v | \$11,270.00 RAISED OFFLINE 0 | 10 OFFLINE DONORS | 11 OFFLINE DONATIONS |

Year-over-Year Metrics

Dollars Raised





How We Support You

Visit Our Help Center

• <u>support.givegab.com</u>

Check Out Our Blog

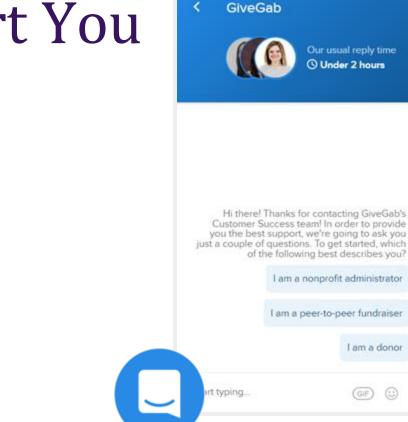
• bonterratech.com/blog

Send us an Email

• extragiveinfo@lancfound.org

Chat with our Customer Success Team

• Look for the little blue chat bubble



Applying for ExtraGive 2024

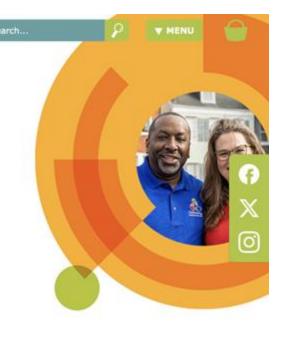


EXTRAGIVE





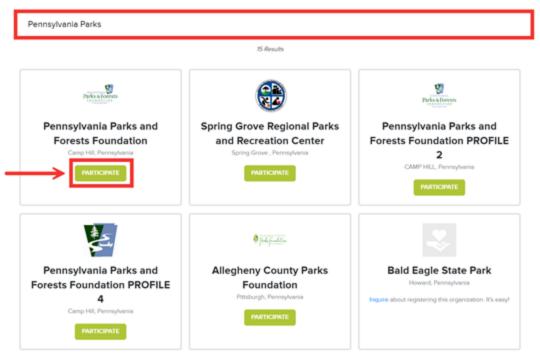
November 22, 2024





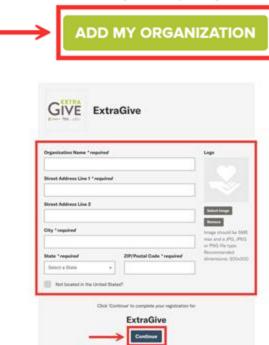
Find Your Organization

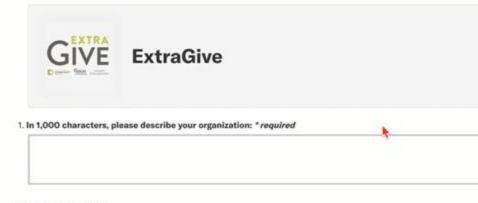
and participate in ExtraGive



Don't see your organization listed?

You can create an organization by clicking the button below.





2. Website: * required

3. Facebook URL: * required

4. Organization phone number: * required

Returning? Copy Your Profile

- Don't forget to review and update your profile afterward!
- Existing bank information will carry over
- Double check that the bank account,

organization representative, and admins on

your profile are up to date

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.

\$0.00 Raised • 0 Donors • 0 Gifts



Completing Your Profile



Your Giving Day Dashboard





Add Your Organization's Info

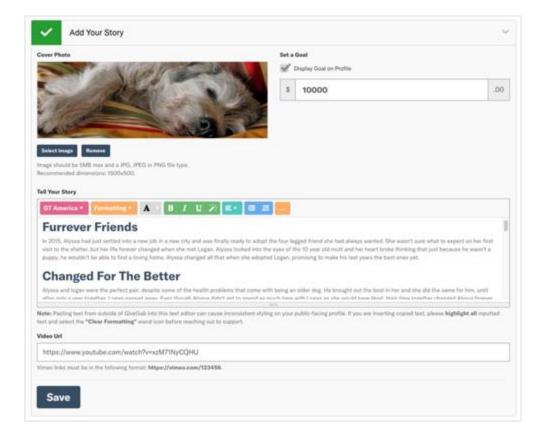
- Logo
- Website
- Causes
- Pro Tip: Adding causes to your profile can help new donors find you via our cause-based search!

| ebsite | | | |
|---|-------------------|---|--|
| igo | Causes (optional) | | |
| 4 | Cause #1 Animals | - | |
| Com- | Cause #2 | - | |
| | Cause #3 | - | |
| 1X | | | |
| elect Image Remove | | | |
| age should be 5MB max and a JPG, JPEG or PNG file type. commended dimensions: 300x300. | | | |



Curate Your Story

- Add a cover photo
- Set a monetary goal
- Tell the story of your organization's participation in ExtraGive through words and visuals



Get Verified

- 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. The verification process can take at least several days, and in some instances more

Donation Status: Incomplete

Please provide your organization's information to ensure you are able to collect donations on GiveGab.
 Verification can take up to 2-3 business days after your information has been entered.

Manage Verification Info

Please Contact Us if you have any questions.

Get Verified

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.



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 <u>here</u>.

Save

Payment Processor Verification

Verify Your Organization



Get Verified

Bonterra

Bonterra partners with Stripe for secure financial services.

Return to Bonterra

Powered by stripe ①

Terms

Privacy

English (US) C

Contact Bonterra for support 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

Company

The combination of your name and Employer Identification Number (ERN) 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)

12-3456789

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

- 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











dd Donation Level

\$25.00 Provides one week of food for a senior pup tell Remee

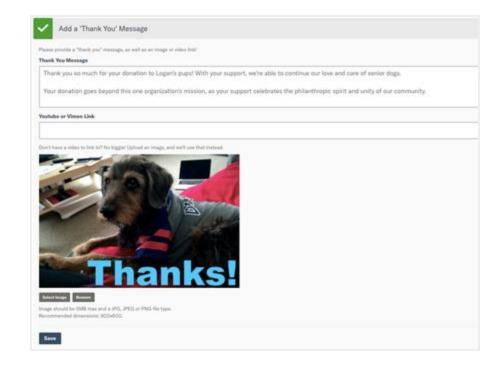
\$50.00 Provides a super soft bed for a loving senior pup tits flamms

\$100.00 Helps a family foster one of our amazing senior pups tot famins

\$500.00 Provides life changing surgery to a senior pup in need £63 Remov

Personalized Gratitude

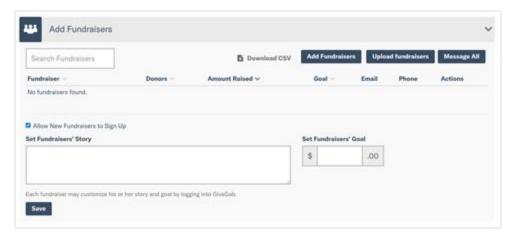
- Add your own message
- Include a photo or video for more personal stewardship!
- Sent immediately to your donors when they complete their gift
- Donors can reply to that email and contact you directly





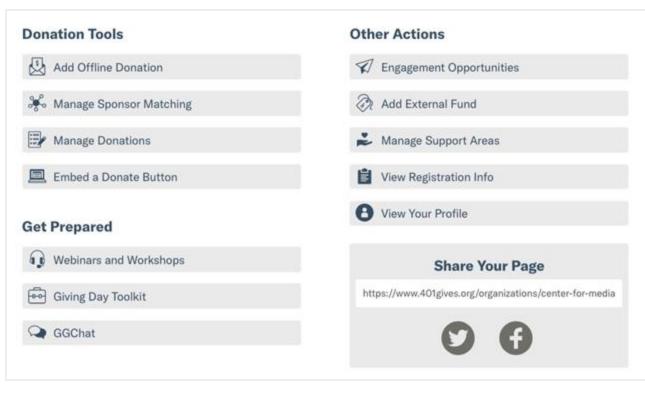
Invite Your Fundraisers

- 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 Fundraising Champions/ Peer-to-Peer Fundraising Training Video



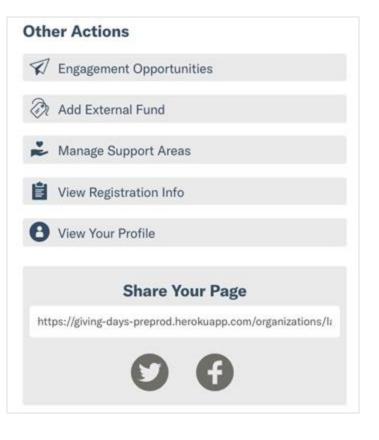
📑 Bonterra

Key Dashboard Tools



Share Your Profile

- Preview your profile along the way
- Share this link with your supporters
- Post directly to X and Facebook from your dashboard







Prevides annuage loved for a call for 2 member



\$50 Providen South In Proc. August of the amount of the function of the amount of



\$100 At an Prevalence files for the second files of the second files



\$250 Provide execution of all and and the off

🜗 Bonterra.



\$500

Picodes brids to house and care for deserving rescue patrice a worth



\$1,000

Cur Story

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Our Non-discrimination Policy

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Presented by river

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What's Next?

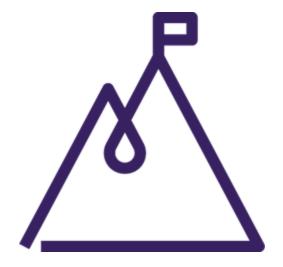


Step Up Your Fundraising with Matches

Use pledged donations as a donor incentive to increase impact!

Once you secure a matching gift, utilize Bonterra's Matching tool to add that money into your totals, according to the criteria you set

- 1:1, 2:1, or 3:1 Matches
- Donor, Dollar, or Donation Challenges
- Pro Tip: Watch the Matching Training Video



Did You Know?

Organizations who had a match last year

for ExtraGive raised on average 3.5x more

than those who did not.

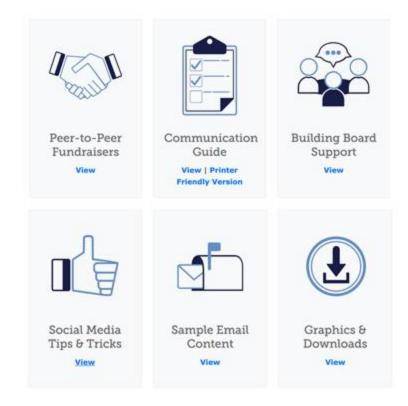




Your CBO Toolkit

The CBO Toolkit has valuable resources for all your ExtraGive needs

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



Your Next Steps

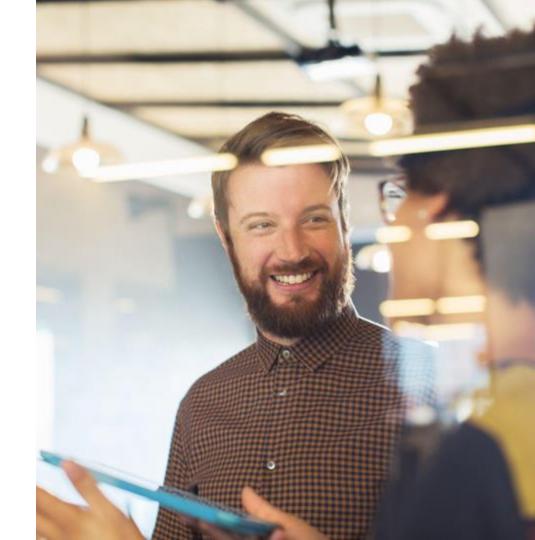
Take a breath!

If this is your first time participating, enjoy it!

Your role as a nonprofit admin can seem overwhelming

You don't need to compete for incentives and prizes

ExtraGive may not be the right fit for all of your donors - that's okay!



Your Next Steps

What to work on over the next [X months/weeks]:

- Follow ExtraGive on Social Media and use #ExtraGive Hashtag
- Watch your inbox for important emails
- Meet internally to discuss goals
- Sign up for upcoming webinars
- Explore the toolkit



Questions?



November 22, 2024

