

# Final Steps to Success

Montana Webinar Series 2024



# Submit Your Questions!

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

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

# Meet the Team



**Claire**

***Associate Project  
Manager***



**Cameron**

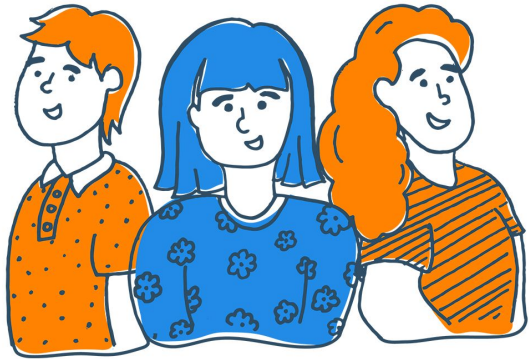
***Associate Project  
Manager***

# Agenda



- **Your Checklist for Success**
- **After the Giving Day**
- **Next Steps**
- **Q&A**

# Updates and Reminders



- Get familiar with the website, and important dates!
- Prizes
- Social Media Feed - use your Giving Day hashtag
- Downloadable graphics, templates, & other resources

# Your Success Checklist

- ✓ **The Perfect Profile**
- ✓ **Gamify with Matches & Challenges**
- ✓ **Engage Ambassadors**
- ✓ **Prepare Communications**



# 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?





## 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

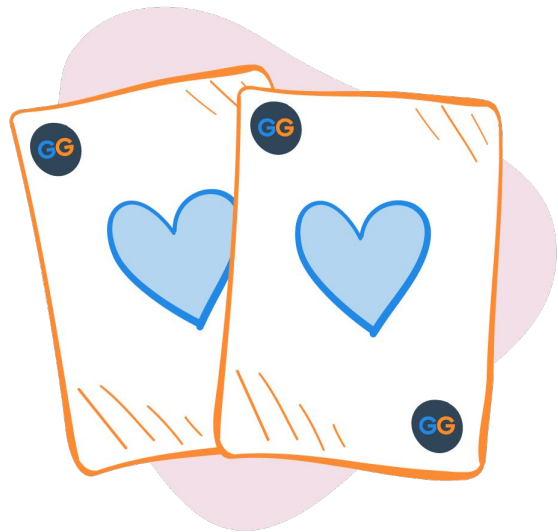
*Provides life changing surgery to a senior pup in need*

CHOOSE YOUR OWN AMOUNT





# Have you secured a matching gift?



- **Why?**
  - Organizations who set up a Match or Challenge for the Giving Day in the past raised on average **3X** more
- **Strategize**
  - Set up your match in a way that draws donor attention
  - Credit the sponsors to cross-promote
- There's still 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 the Giving Day profile
- ✓ Verify your match setup with chat support
- ✓ Curate communications to highlight your match

# 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**

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### Board of Directors Match

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

Total Amount	Amount Remaining	✓ Auto-Matching Enabled
<b>\$5,000.00</b>	<b>\$850.00</b>	

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

Edit Archive Remove Deplete Match

# Matches & Challenges

## Resources



[What are Matches and Challenges?](#)

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

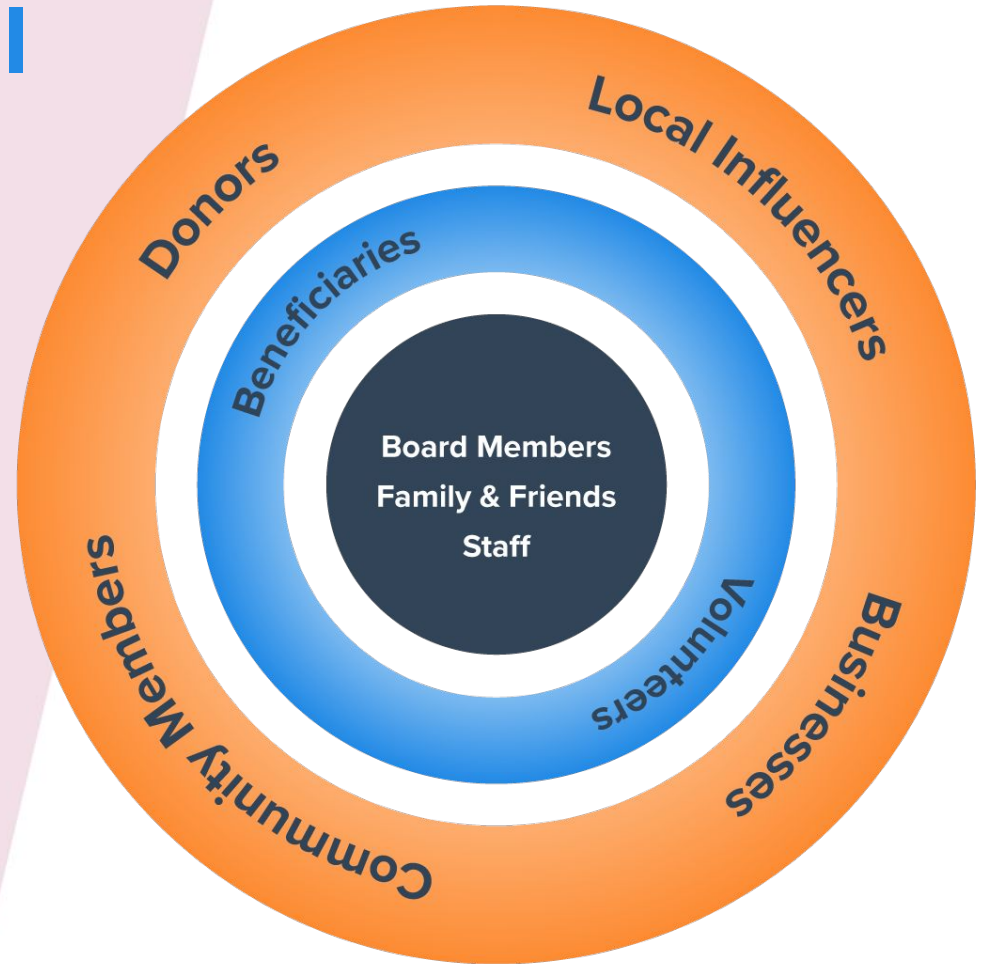
[How do I add a Challenge to my Giving Day profile?](#)

# Do you have Ambassadors aka P2P 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 champion or a fundraiser
- **Pro Tip:** Watch the Peer-to-Peer Fundraiser training video



# Identify Potential Fundraisers



# Setting Up For Success

- Set up a quick info session for Champions (Peer-to-Peer Fundraisers)
- Walk them through the giving day **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 Champions 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 the Giving Day Nonprofit Toolkit





# How will you communicate?

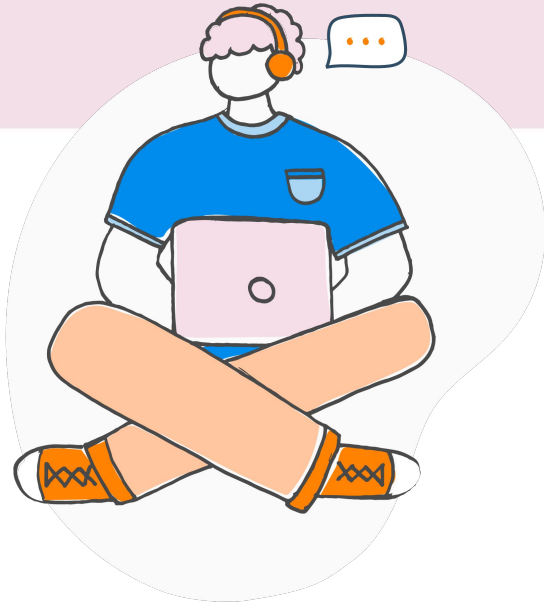


- Utilize multiple online channels
  - Social Media
  - Email and direct mail communications
- C.O.P.E. Create Once, Post Everywhere!
- Curate authentic visual content
- **Pro Tip:** Create QR codes for your profile

# Post-Giving Day Success

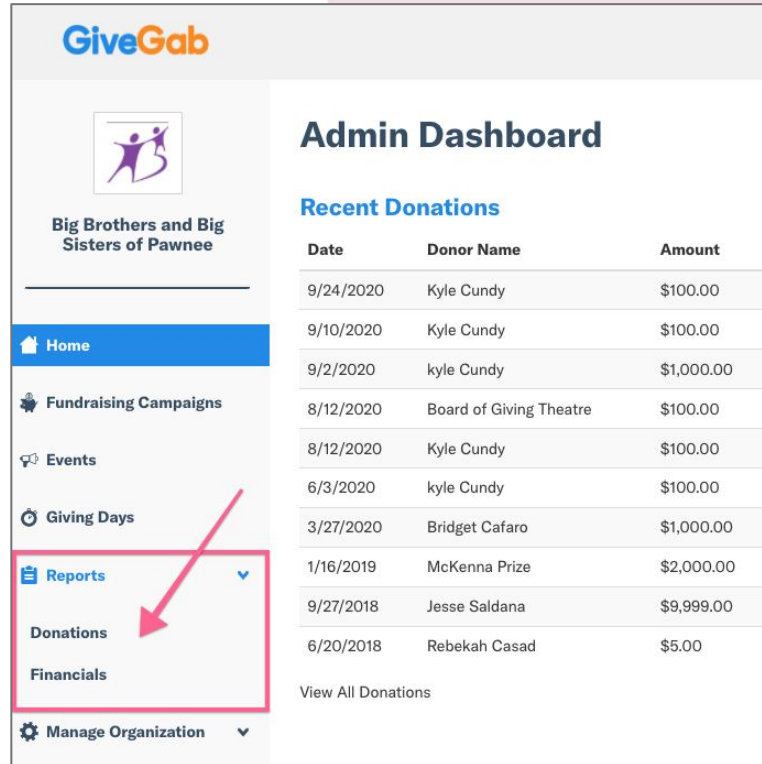


# How will you get your donations?



- Donations will be deposited either directly from Bonterra or the Giving Day host after the giving day
- All donations are recorded in the platform which is accessible by admins for your nonprofit
- 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**


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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](#)


▾  ▾  ▾


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

Logan's Pups  
GG Pay Financials

Balances  
Payouts  
Refunds

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?

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



# Final Checklist

- Complete your profile by **ASAP**
- Ensure you are verified to collect donations
- Keep an eye out for important emails!
- Follow your giving day host on Social Media and use the giving day 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

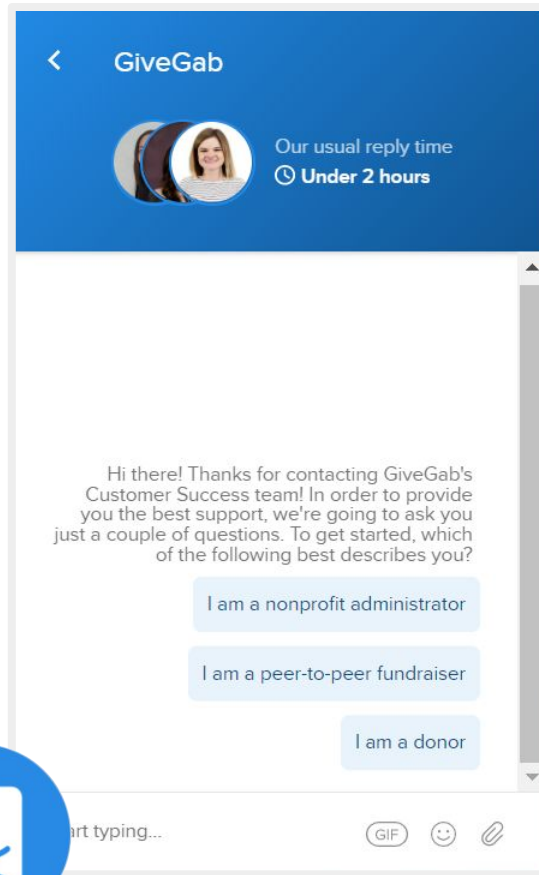
Visit our [Help Center](#)

Check out [Our Blog](#)

Send us an email at

[CustomerSuccess@GiveGab.com](mailto:CustomerSuccess@GiveGab.com)

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



# Questions?