Getting Ready for Southern New Mexico Giving Day

April 21, 2023
If you have questions or comments throughout our training, please write in using your Zoom webinar attendee panel.
Agenda

- Southern New Mexico Giving Day Overview
- Who is GiveGab?
- What’s New
- Creating Your Profile
- Post Giving Day
- Next Steps & Questions
2022 Results

Thank you for making a difference!

Outcomes & Results

$60,941 Raised
385 Donors
44 Organizations
Giving Day Updates and Reminders

- [www.southernnewmexicogivingday.org](http://www.southernnewmexicogivingday.org)
- April 21, 2023 12AM - 12AM
- Prizes
- Social Media Feed
- Registration Fee Reminder
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 + Southern New Mexico Giving Day marketing = exponential visibility for all organizations
- Utilize the Giving Day to reach other internal goals
- Motivate donors to make a greater impact with prizes and match incentives
Who is GiveGab?
Who is GiveGab?

GiveGab’s mission is to make it incredibly easy for fundraising professionals to be great at their jobs!

- Host a secure, reliable and transparent platform for Southern New Mexico Giving Day
- Create the ultimate donor experience
- Provide a dedicated support team
- GiveGab is becoming Bonterra!
Donation Security

- Partnered with Stripe - PCI Level 1 Payment Processor for donation processing
- Direct deposit funds within 5-7 business days
- Your banking information is reviewed by Stripe
- Donor credit card information is not revealed or saved in GiveGab
- All participating organizations verified as IRS and state-recognized nonprofits
Simple Donation Processing

- All major credit cards accepted
- Log right into your bank to use the Plaid/ACH payment
- Quick, easy and fun donation flow
- Securely processed through Stripe
- GiveGab’s chat support available right within the donation form for your supporters!
Transparent Donations

- **Credit Card, ACH, Mobile Pay** for online transactions
- Donors can cover all fees on behalf of your organization
- Historically, donors cover 92.9%% of fees during Southern New Mexico Giving Day
- That means it cost only $4 per $100 raised online!
Transparent Donations

Credit Card:
3.5% Platform Fee + $0.30 per transaction & 2.5% transaction fee (Stripe) = 6% + $0.30

ACH:
3.5% Platform Fee + $3.00 flat bank fee = 3.5% + $3.00
*$100 minimum
GiveGab's Giving Day Gift Basket makes it easy for donors to support as many causes as they like!
Instant Donor Delight

- A Thank You email that comes from your organization
- Sent immediately after the gift is made
- Includes your organization’s EIN and donation amount to act as a tax-deductible receipt
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
  - Look for the little blue chat bubble
What’s New for 2023?
Better Reconciliation

- In addition to your existing reports, you can better manage deposits to your account
- Understand your balance and donations from an accounting perspective
- Match each online gift to a deposit
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
Year-over-Year Metrics

Dollars Raised

Donor Counts
Returning? Copy Your Profile

- Don’t forget to review and update your profile after!
- Existing bank information will carry over
  - Double check that your bank account, org rep and admins on your profile are up to date!
Completing Your Profile
<table>
<thead>
<tr>
<th>Task</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Your Organization's Info</td>
<td>✔️</td>
</tr>
<tr>
<td>Add Your Story</td>
<td></td>
</tr>
<tr>
<td>Get Verified to Collect Donations</td>
<td>✔️</td>
</tr>
<tr>
<td>Add Donation Levels</td>
<td></td>
</tr>
<tr>
<td>Add a 'Thank You' Message</td>
<td></td>
</tr>
</tbody>
</table>
Basic Info

- Logo
- Website
- Causes
- **Pro Tip:** Adding causes to your profile can help new donors find you by our cause-based search!
Curate Your Story

- Add a cover photo
- Set a monetary goal
- Tell the story of your organization’s participation in the giving day through words and visuals
Get Verified on GiveGab

- 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. It can take at least several days, and in some instances more

Get Verified to Collect Donations

Status: **Incomplete**

Please provide your organization's information and verify you can collect donations in your state here.

- Confirm State Fundraising Compliance
- Add Bank Info
Get Verified on GiveGab

Complete Your Verification

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.

Save

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 here.

Save

Payment Processor Verification

Verify Your Organization
Get Verified on GiveGab

Bonterra partners with Stripe for secure financial services.

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 (EIN) 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
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
# Key Dashboard Tools

## Donation Tools
- Add Offline Donation
- Manage Sponsor Matching
- Manage Donations
- Embed a Donate Button

## Get Prepared
- Webinars and Workshops
- Giving Day Toolkit
- GGChat

## Other Actions
- Engagement Opportunities
- Add External Fund
- Manage Support Areas
- View Registration Info
- View Your Profile

## Share Your Page
https://www.401gives.org/organizations/center-for-media
Share Your Profile

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

Other Actions

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Share Your Page

https://giving-days-preprod.herokuapp.com/organizations/1
Step Up Your Fundraising with Matches

Use pledged donations as a donor incentive to increase impact!

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

- 1:1 Dollar-for-Dollar Matches
- Donor or Dollar Challenges
- **Pro Tip:** Watch the [Matching Training Video](#)
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 Southern New Mexico 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 on a rolling basis 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

Admin Dashboard

Recent Donations

<table>
<thead>
<tr>
<th>Date</th>
<th>Donor Name</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/24/2020</td>
<td>Kyle Cundy</td>
<td>$100.00</td>
</tr>
<tr>
<td>9/10/2020</td>
<td>Kyle Cundy</td>
<td>$100.00</td>
</tr>
<tr>
<td>9/2/2020</td>
<td>Kyle Cundy</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>8/12/2020</td>
<td>Board of Giving Theatre</td>
<td>$100.00</td>
</tr>
<tr>
<td>8/12/2020</td>
<td>Kyle Cundy</td>
<td>$100.00</td>
</tr>
<tr>
<td>6/3/2020</td>
<td>Kyle Cundy</td>
<td>$100.00</td>
</tr>
<tr>
<td>3/27/2020</td>
<td>Bridget Caffaro</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>1/16/2019</td>
<td>McKenna Price</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>9/27/2018</td>
<td>Jesse Saldana</td>
<td>$9,998.00</td>
</tr>
<tr>
<td>6/20/2018</td>
<td>Rebekah Casad</td>
<td>$5.00</td>
</tr>
</tbody>
</table>

View All Donations

GiveGab is becoming Bonterra
Filtering Your Data

Donations

Search by name or email

- All Giving Days & Community Giving
- All Campaigns
- Any Donation Type

Start: 11/22/2021 12:42PM
End: 12:42PM

Donor: katrina grein
Email: katrina@givegab.com

Intended Donation: $100.00
### Exporting Your Donor Data

<table>
<thead>
<tr>
<th>ID</th>
<th>Date</th>
<th>Name</th>
<th>Time</th>
<th>Email</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>5467</td>
<td>2/10/2021</td>
<td>Laryssa Habert</td>
<td>10:40AM</td>
<td><a href="mailto:larryssa.habert@givegab.com">larryssa.habert@givegab.com</a></td>
<td>$5.00</td>
</tr>
<tr>
<td>5439</td>
<td>2/11/2021</td>
<td>Jonathan Nay</td>
<td>2:23PM</td>
<td><a href="mailto:jon.nay1@givegab.com">jon.nay1@givegab.com</a></td>
<td>$25.00</td>
</tr>
<tr>
<td>5438</td>
<td>2/11/2021</td>
<td>Jonathan Nay</td>
<td>2:21PM</td>
<td><a href="mailto:jon.nay1@givegab.com">jon.nay1@givegab.com</a></td>
<td>$25.00</td>
</tr>
</tbody>
</table>

- **Export CSV**
- **Edit Bank Account Info**
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
- [DoG NAME] Downloadable Graphics
- Resources for Board Members and P2P Fundraisers
- Blog Articles and How-To Videos from GiveGab
Your Nonprofit Toolkit

The Nonprofit Toolkit has valuable resources for all your Southern New Mexico Giving Day 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
- Southern New Mexico Giving Day may not be the right fit for all of your donors - that's okay!
Final Checklist

- Ensure you are verified to collect donations in GiveGab
- Keep an eye out for important emails!
- Follow the Southern New Mexico teams on Social Media and use #SNMGivingDay
- Watch on-demand training course videos
- Check out the Nonprofit Toolkit