

Getting Ready for Southern New Mexico Giving Day

April 26, 2024



Submit Your Questions



Chat Box

To: All panelists
Type: All panelists and attendees



Q&A

Please input your question

Send Anonymously

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

Agenda



- **Creating Your Profile**
- **Peer to Peer Fundraising**
- **Next Steps**
- **Questions**

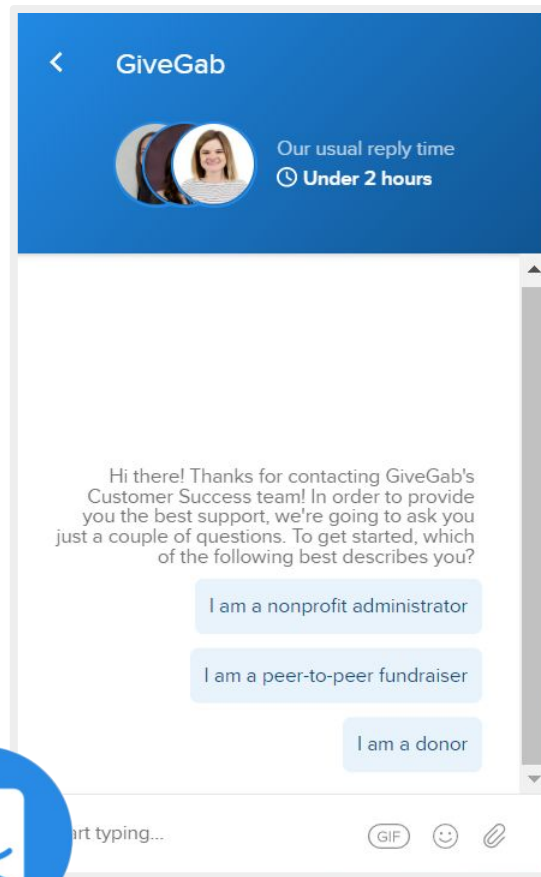
About GiveGab/ Bonterra



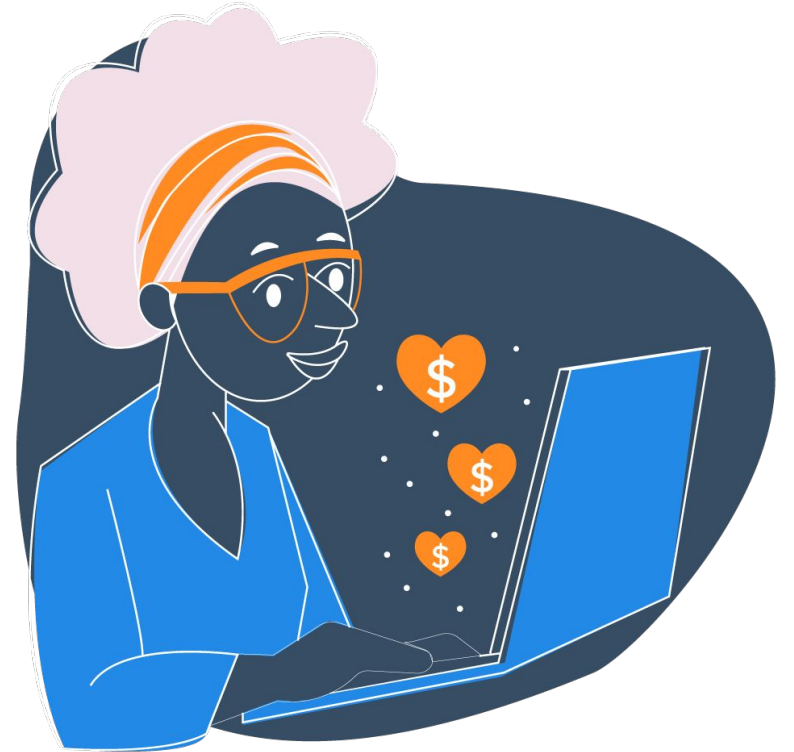
GiveGab is becoming  Bonterra.

How We Support You

- Visit Our Help Center
 - support.givegab.com
- Check Out Our Blog
 - bonterratech.com/blog
- Send us an Email
 - CustomerSuccess@givegab.com
- Chat with GiveGab's Customer Success Team
 - Look for the little blue chat bubble

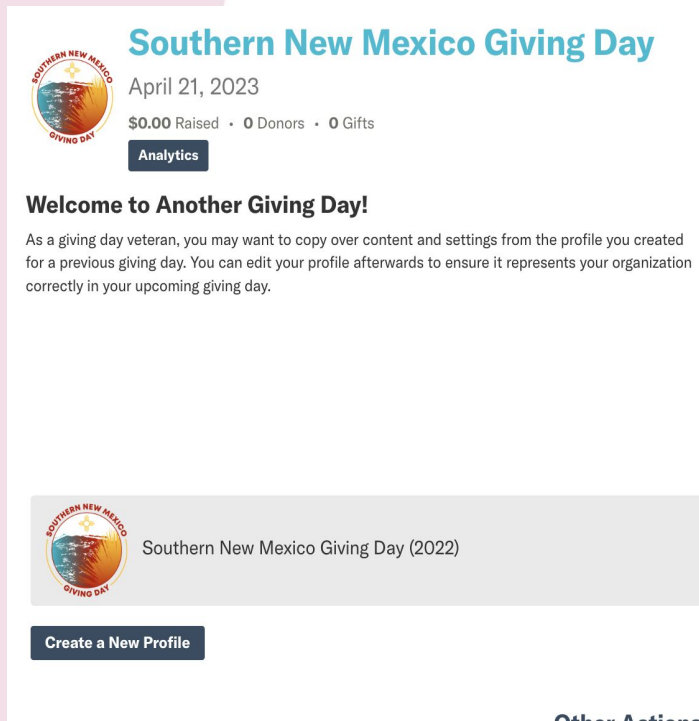


Completing Your Profile



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!



The screenshot shows a profile for the Southern New Mexico Giving Day, dated April 21, 2023. It displays statistics: \$0.00 Raised, 0 Donors, and 0 Gifts. There is an 'Analytics' button. Below this is a 'Welcome to Another Giving Day!' section with a paragraph of text. At the bottom, there is a 'Create a New Profile' button and a 'Copy This Profile' button next to a profile card for the 2022 event.

Southern New Mexico Giving Day
April 21, 2023
\$0.00 Raised • 0 Donors • 0 Gifts
[Analytics](#)

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.

Southern New Mexico Giving Day (2022)
[Copy This Profile](#)

[Create a New Profile](#)

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

63 Days to Launch
Participation Approval Status
Pending

Thank you for applying to participate in Southern New Mexico Giving Day! Your eligibility is being reviewed.

Your Giving Day Dashboard



Add Your Organization's Info



Add Your Story



Get Verified to Collect Donations



Add Donation Levels



Add a 'Thank You' Message



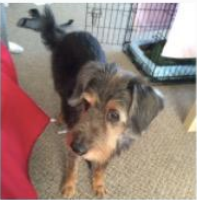
Basic Info

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

✓ Add Your Organization's Info

Website

Logo



Select Image Remove

Image should be 5MB max and a JPG, JPEG or PNG file type.
Recommended dimensions: 300x300.

Causes (optional)

Cause #1 Animals

Cause #2

Cause #3


Save

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

✓ Add Your Story

Cover Photo



[Select Image](#) [Remove](#)





Image should be 5MB max and a JPG, JPEG or PNG file type.
Recommended dimensions: 1500x500.

Set a Goal

Display Goal on Profile

\$.00

Tell Your Story

GT America Formatting A B I U    

Furrever Friends

In 2015, Alyssa had just settled into a new job in a new city and was finally ready to adopt the four legged friend she had always wanted. She wasn't sure what to expect on her first visit to the shelter, but her life forever changed when she met Logan. Alyssa looked into the eyes of the 10 year old mutt and her heart broke thinking that just because he wasn't a puppy, he wouldn't be able to find a loving home. Alyssa changed all that when she adopted Logan, promising to make his last years the best ones yet.

Changed For The Better

Alyssa and Logan were the perfect pair, despite some of the health problems that come with being an older dog. He brought out the best in her and she did the same for him, until after only a year together Logan passed away. Even though Alyssa didn't get to spend as much time with Logan as she would have liked, their time together changed Alyssa forever.

Note: Pasting text from outside of GiveGab into this text editor can cause inconsistent styling on your public-facing profile. If you are inserting copied text, please **highlight all** inputted text and select the **"Clear Formatting"** wand icon before reaching out to support.



Video Url

Video links must be in the following format: <https://vimeo.com/123456>.

[Save](#)

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

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.](#)

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



Bonterra partners with Stripe for secure financial services.

[← Return to Bonterra](#)

Powered by **stripe**

[Terms](#)

[Privacy](#)

English (US)

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

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)

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

✓ Add Donation Levels


We recommend having 3 or 4 donation levels.




\$25.00
Provides one week of food for a senior pup
[Edit](#) [Remove](#)



\$50.00
Provides a super soft bed for a loving senior pup
[Edit](#) [Remove](#)



\$100.00
Helps a family foster one of our amazing senior pups
[Edit](#) [Remove](#)



\$500.00
Provides life changing surgery to a senior pup in need
[Edit](#) [Remove](#)

Add Donation Level

- 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

✓ Add a 'Thank You' Message

Please provide a "thank you" message, as well as an image or video link!


Thank You Message

Thank you so much for your donation to Logan's pups! With your support, we're able to continue our love and care of senior dogs.

Your donation goes beyond this one organization's mission, as your support celebrates the philanthropic spirit and unity of our community.

Youtube or Vimeo Link

Don't have a video to link to? No biggie! Upload an image, and we'll use that instead.



Select Image Remove

Image should be 5MB max and a JPG, JPEG or PNG file type.
Recommended dimensions: 800x600.

Save

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

 Engagement Opportunities

 Add External Fund

 Manage Support Areas

 View Registration Info

 View Your Profile

Share Your Page

<https://giving-days-preprod.herokuapp.com/organizations/>



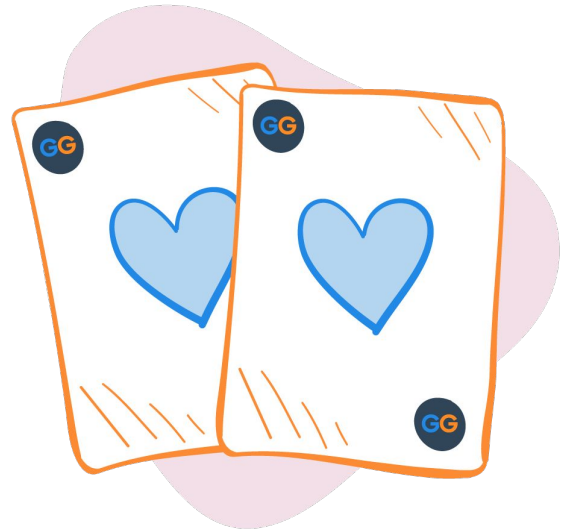
Step Up Your Fundraising with Matches

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](#)

Note: All organizations must submit a form to the Community Foundation.



Make 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



Peer to Peer Fundraising

GiveGab is becoming  Bonterra.

What is P2P Fundraising?

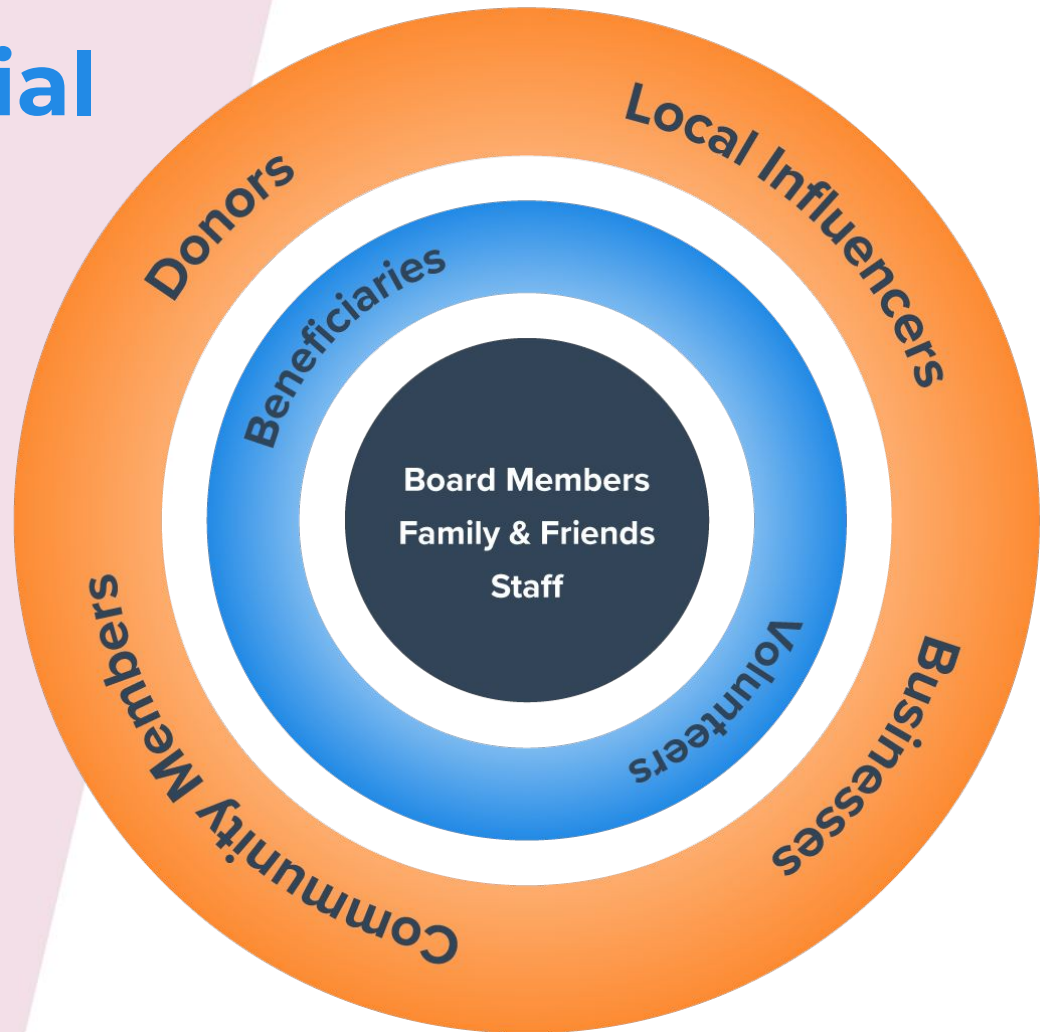
Peer-to-Peer Fundraising allows your most passionate supporters to create and host their own fundraising page right within your Southern New Mexico Giving Day profile. Their totals roll up into your totals!

4 Steps to Fundraising Success

- 1 Select individuals who will be your loudest voices
- 2 Communicate that storytelling is vital, and can replace a direct “ask”
- 3 Steward your fundraisers
- 4 Make it fun



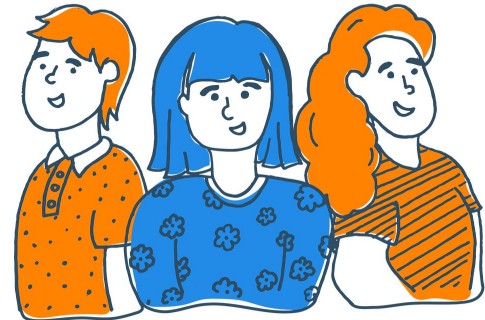
Identify Potential Fundraisers



Capture Fundraiser Stories

Motivate fundraisers to share their personal connection to your mission by asking these questions:

- What made you decide to get involved?
- What do you wish everyone knew about this organization?
- Why do you enjoy giving to our organization?
- What is your favorite program or service and why?
- How do you feel after [working at, volunteering at] our organization?



Steward Your Fundraisers



- Treat fundraisers like major donors
- Acknowledge fundraising for your organization as a higher level of participation
- Recognize those who raise a lot for your cause
- Invest in your long term relationship
- Ensure your fundraisers have a great experience regardless of how much they raise

Make It Fun!

- Create friendly competition
- Pair it with an event
- Provide templated graphics, communications and sample content ideas for sharing on social media
- Ask yourself, what experience would you want to have as a fundraiser?



Set Your Fundraisers Up For Success



Start Early

- Educate your fundraisers
- Understand their capacity for this ask



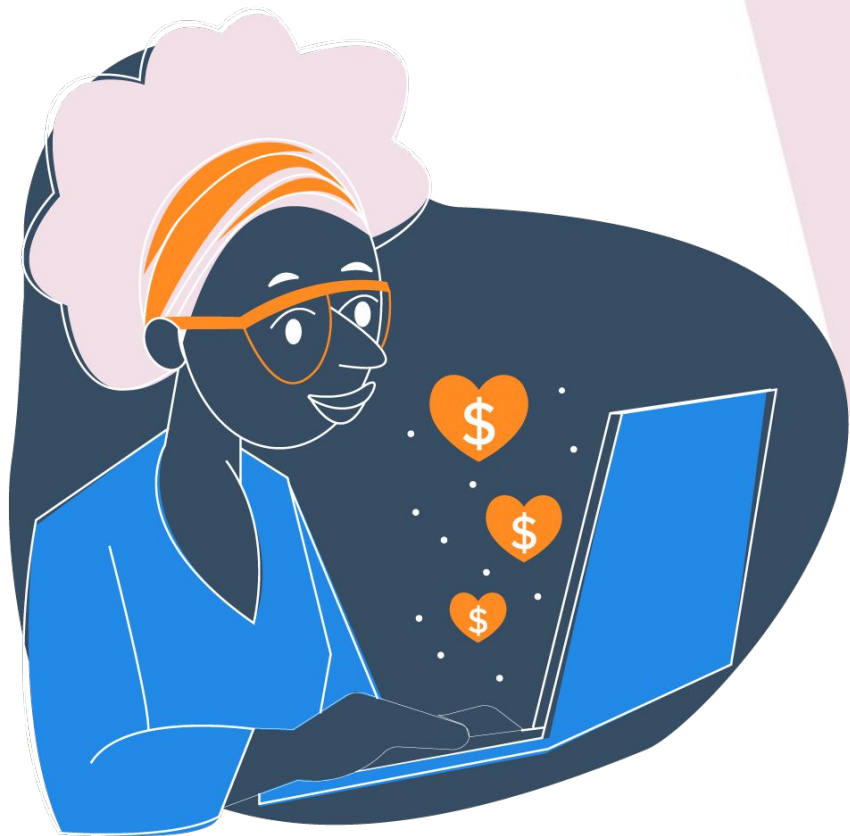
Be Clear

- Be transparent with your goals
- Set expectations for your fundraisers



Make It Easy

- Provide the content they need
- Take time to check-in



Inviting Your Fundraisers

Demo

- ✓ Add Your Organization's Info >
- ✓ Add Your Story >
- ✓ Get Verified to Collect Donations >
- ✓ Add Donation Levels >
- ✓ Add a 'Thank You' Message >
- 👤 Add Fundraisers >

Reset Profile

ⓘ Resetting the profile will reset the story, thank you message, images, and settings to default values, as well as remove any donation levels. After resetting this profile, a profile from a previous giving day can be copied to use as a starting point.

👤 Add Fundraisers

Search Fundraisers: [Download CSV](#) [Add Fundraisers](#) [Upload Fundraisers](#) [Message A](#)

Fundraiser	Fundraiser Display Name	Donors	Amount Raised	Goal	Email	Phone	Action
No fundraisers found.							

Allow New Fundraisers to Sign Up

Set Fundraisers' Story

Set Fundraisers' Goal

\$.00



Each fundraiser may customize his or her story and goal by logging into GiveGab.





[Save](#)





Demo

Navigate to your Fundraisers Tab in your Giving Day Dashboard.

Select “Add Fundraisers”

 **Add Fundraisers** 

 **Download CSV**  **Add Fundraisers**  **Upload Fundraisers**  **Message All**

Fundraiser  **Fundraiser Display Name** **Donors**  **Amount Raised**  **Goal**  **Email** **Phone** **Actions**

No fundraisers found.

Allow New Fundraisers to Sign Up

Set Fundraisers' Story

Set Fundraisers' Goal
\$

Each fundraiser may customize his or her story and goal by logging into GiveGab.

Save

Demo

Invite one or multiple fundraisers. You will need first name, last name, and email address.

Add Fundraisers

Fundraiser Display Name (optional)

First Name

Last Name

Email



Fundraiser Display Name (optional)

First Name

Last Name

Email





+ New Fundraiser

Cancel





Next: Compose Your Message







Demo

 Add Fundraisers 

Search Fundraisers:

 Download CSV  Add Fundraisers  Upload Fundraisers  Message All


Fundraiser 	Fundraiser Display Name	Donors 	Amount Raised 	Goal 	Email	Phone	Actions
No fundraisers found.							

Allow New Fundraisers to Sign Up

Set Fundraisers' Story


Set Fundraisers' Goal

Each fundraiser may customize his or her story and goal by logging into GiveGab.




Upload a CSV to invite a group of fundraisers at once.


Fundraiser Dashboard




Tell Your Story




Make a Donation



Reach Out

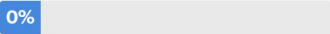


Share Socially



Give Thanks



Progress

0% 

\$0 Raised of \$500 Goal	58 Days Left
0 Donors	0 Emails Sent

Share your fundraiser!

<https://giving-days.herokuapp.com/p2p/3>

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
- 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



Questions?



April 26, 2024