Building your Profile and Utilizing Peer-to-Peer Fundraising for Palmetto Giving Day

May 2-3, 2023
Agenda

- Registering for the giving day
- Creating Your Profile
- Peer-to-Peer Fundraising
- Next Steps & Questions
Registering for Palmetto Giving Day
Find Your Organization
and participate in Palmetto Giving Day

All4Paws
Pawleys Island, South Carolina

1 Results

Don't see your organization listed?
You can create an organization by clicking the button below.

ADD MY ORGANIZATION
Find Your Organization
and participate in Palmetto Giving Day

0 Results

No organizations match your search criteria.

Don't see your organization listed?
You can create an organization by clicking the button below.

ADD MY ORGANIZATION
<table>
<thead>
<tr>
<th>Organization Name * required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Street Address Line 1 * required</td>
</tr>
<tr>
<td>Street Address Line 2</td>
</tr>
<tr>
<td>City * required</td>
</tr>
<tr>
<td>State * required</td>
</tr>
<tr>
<td>Select State</td>
</tr>
</tbody>
</table>

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

Not located in the United States?

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1. What is the name of your organization? * required

2. Who is the primary contact person for your organization? * required

3. What is your primary contact's email address? * required

4. What is your organization's mailing address? * required
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!

Give Local 757! May 10, 2022
$0.00 Raised • 0 Donors • 0 Gifts

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.

Create a New Profile
Completing Your Profile
# Your Giving Day Dashboard

<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>
<tr>
<td>Add Fundraisers</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 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.

← Return to Bonterra

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

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 problem! Upload an image, and we’ll use that instead.

Select Image

Image should be 5MB max and a JPEG, PNG or PDF file type.
Recommended dimensions: 600x400.
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 [Peer-to-Peer Fundraising Training Video](#)
Did you know?

Organizations who use P2P fundraising on average, raise 3.4x more than those who do not utilize P2P Fundraisers.
# Key Dashboard Tools

## Donation Tools
- 🟢 Manage Matches and Challenges
- 📊 Manage Donations
- 📀 Embed a Donate Button

## Other Actions
- 🎉 Engagement Opportunities
- 💳 Add External Fund
- 📂 View Registration Info
- 📚 View Your Profile
- 🚪 Mobilize Integration

## Get Prepared
- 🎊 Giving Day Toolkit
- 📞 Help Center

## Share Your Page
[https://www.palmettogivingday.org/organizations](https://www.palmettogivingday.org/organizations)
Share Your Profile

- Preview your profile along the way
- Share this link with your supporters
- Post directly to Twitter and Facebook from your dashboard
- Registration deadline is **December 16**, but you can still edit your profile up until the giving day.

**Other Actions**
- Engagement Opportunities
- Add External Fund
- View Registration Info
- View Your Profile
- Mobilize Integration

**Share Your Page**

https://giving-days-preprod.herokuapp.com/organizations/
Peer-to-Peer Fundraising
Why is it so effective?

- Multiplies your reach to potential donors
- Results in more authentic outreach and messaging
- Uses the power of social influence
- Increases your social media presence
- Establishes another avenue for engagement with your organization
Strategize and Plan
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

- Donors
- Local Influencers
- Beneficiaries
- Volunteers
- Business
- Community Members
- Staff
- Family & Friends

Board Members
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

Navigate to your Fundraisers Tab in your Giving Day Dashboard.

Set a default story and goal for your P2P's.

Make fundraising invite-only, or open to anyone interested.
Demo

Navigate to your Fundraisers Tab in your Giving Day Dashboard.

Select “Add Fundraisers”
Demo

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

Write a personalized message to your Invitees!

This will be sent alongside an email invite with instructions on how to set up their P2P page.
Demo

You can export a list of your Fundraisers, monitor their progress, and communicate with them individually or in bulk.

You can access the P2P’s dashboard if they need assistance with their profile!
Your Fundraiser’s Dashboard

Noelle Butler's fundraising dashboard for Kitty Corner

Complete the steps below to be sure that your fundraiser is successful.

Tell Your Story

Make a Donation

Reach Out

Share Socially

Give Thanks

Progress

$50 Raised of $500 Goal
115 Days Left
1 Donor
0 Emails Sent

Share your fundraiser:
https://giving-days-demo.herokuapp.com,

GiveGab is becoming Bonterra.
Takeaways & Resources
Timeline for P2P Recruitment

**Plan**
- Review fundraising toolkits
- Brainstorm internally
- Set goals

**Prepare**
- Invite & onboard P2P's
- Communicate goals
- Share resources

**Coordinate**
- Provide templated materials
- Host office hours for questions
- P2P's complete profiles

**Check In**
- Send encouraging messages
- Update P2P's on progress

**Follow Up**
- Thank your P2P's
- Plan post-event touch points
- Collect feedback, host debrief

**After the Day**
- Plan post-event touch points

**Day Of**
- Host office hours for questions
- P2P's complete profiles

**Late March**
- Coordinate

**Early Feb**
- Prepare

**Now**
- Plan
Key Takeaways

- P2P Fundraisers can help you raise 3.4x more
- Fundraisers increase your organization’s reach
- Be strategic when selecting fundraisers
- Provide your fundraisers with resources to make it easy and fun
- There is plenty of time before Palmetto Giving Day. Start small this year and grow it in the future!
Tools for Success

Tools for Nonprofit Organizations

- How to identify and add fundraisers
- Support articles & videos for engaging Fundraising Peer-to-Peer Fundraisers
- Email templates for recruiting fundraisers
Tools for Success

Tools for Fundraisers

- How to sign up
- Resources & support articles
- Communication guides & templates
- Link to downloads page
Giving Day Support & Resources

Visit our Help Center

Check out Our Blog

Send us an email at CustomerSuccess@givegab.com

Chat with GiveGab's Customer Success Team whenever you have questions or need a hand! Just look for the little blue chat bubble.
Questions?

PALMETTO GIVING DAY

May 2-3, 2023