Final Steps to Success for Palmetto Giving Day

May 2-3, 2023
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.
Agenda

- Palmetto Giving Day Updates & Reminders
- Your Checklist for Success
- After Palmetto Giving Day
  - Next Steps
  - Q&A

GiveGab is becoming Bonterra.
Palmetto Giving Day Updates and Reminders

- Palmettogivingday.org | 6am on May 2 to 6pm on May 3
- Prizes/Matches/Challenges
- Social Media Feed - use hashtag #palmettogivingday
Your Success Checklist

☑ Ready for Donations?
☑ The Perfect Profile
☑ Gamify with Matches & Challenges
☑ Engage Ambassadors
☑ Prepare Communications
Are you able to accept donations?

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</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>Hooray! Your organization has been verified to accept donations on GiveGab.</td>
</tr>
<tr>
<td></td>
<td>- Confirmed state fundraising compliance</td>
</tr>
<tr>
<td></td>
<td>- Bank account and organization information verified</td>
</tr>
</tbody>
</table>

GiveGab is becoming Bonterra.
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?

**Pro tip:** Add a short video and search keywords for more visibility!
Have you secured a matching gift?

- **Why?**
  - Organizations who set up a Match or Challenge for Palmetto Giving Day 2022 raised on average 7X more

- **Strategize**
  - Set up your match in a way that draws donor attention
  - Credit the sponsors to cross-promote

- There’s still plenty of time to start this year!
- First time? Keep it simple.
- **Pro Tip:** Watch the Matches & Challenges training
New: Matches

**Match Details**

- **Match Name**
- **Description**
- **Total Matching Funds Available**

**Matching Ratio**
- 1:1 example: $10 donation is matched by $10
- 2:1 example: $10 donation is matched by $20
- 3:1 example: $10 donation is matched by $30

Donations will be multiplied by this amount when matched. Cannot be edited after matching donations have been made. **Pro tip:** use the description to let your donors know how their donations will be matched.
New: Challenges

**Challenge Type**

- Donation Challenge

A **Dollar Challenge** is fulfilled and an offline donation is created when a certain amount is raised. A **Donor Challenge** is fulfilled and an offline donation is created when a certain number of unique donors have given. A **Donation Challenge** is fulfilled and an offline donation is created when a certain number of qualifying donations have been made.

**Challenge Goal**

How many donations are needed to complete this challenge?

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**Dollar Challenge**

- Donor Challenge
- Donation Challenge

A **Dollar Challenge** is fulfilled and an offline donation is created when a certain amount is raised. A **Donor Challenge** is fulfilled and an offline donation is created when a certain number of unique donors have given. A **Donation Challenge** is fulfilled and an offline donation is created when a certain number of qualifying donations have been made.
Your Matching To-Do List

- Identify sponsors to ask
- Secure commitment
- Add Matches and Challenges your Palmetto Giving Day profile
- Verify your match setup with GiveGab support if needed
- Curate communications to highlight your match
Do you have Ambassadors aka Champions?

- **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/Champions)
- Anyone can be an champion or a fundraiser
- **Pro Tip:** Watch the Peer-to-Peer Fundraiser training video
## Champion Leaderboard

**Leaderboards for Palmetto Giving Day**

Select a leaderboard to view:

<table>
<thead>
<tr>
<th>Name</th>
<th>Amount Raised</th>
<th>Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td>first4032581 last4032581</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(Keep It Green Advocacy)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>first1017050 last1017050</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(Keep It Green Advocacy)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Setting Up For Success

- Set up a quick info session for Champions (Peer-to-Peer Fundraisers)
- Walk them through the Palmetto 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
New this year: Gift Map

- Each state will darken as more gifts are received
- Challenge your donors - seek gifts from as many states as possible!
- Social Media Challenge Example: “20 State Challenge” - if we get donors from 20 different states, a prize will be unlocked.
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 Palmetto 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-Palmetto 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 / Bonterra.
- 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 Cafaro</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>1/16/2019</td>
<td>McKenna Prize</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>9/27/2018</td>
<td>Jesse Saldana</td>
<td>$8,989.00</td>
</tr>
<tr>
<td>6/20/2018</td>
<td>Rebekah Casad</td>
<td>$5.00</td>
</tr>
</tbody>
</table>

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Filtering Your Data

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

Search by name or email

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

Actions | Donation ID | Date | Donor | Intended Donation
--- | --- | --- | --- | ---
| | 6554 | 11/22/2021 12:42PM | katrina grein | $100.00

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Exporting Your Donor Data

<table>
<thead>
<tr>
<th>#</th>
<th>Amount</th>
<th>Date/Time</th>
<th>Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>5467</td>
<td>$5.00</td>
<td>2/10/2021 10:40AM</td>
<td>Laryssa Habert</td>
<td><a href="mailto:laryssa.habert@givegab.com">laryssa.habert@givegab.com</a></td>
</tr>
<tr>
<td>5439</td>
<td>$25.00</td>
<td>2/2/2021 2:23PM</td>
<td>Jonathan Nay</td>
<td><a href="mailto:jon.nay11@givegab.com">jon.nay11@givegab.com</a></td>
</tr>
<tr>
<td>5438</td>
<td>$25.00</td>
<td>2/2/2021 2:21PM</td>
<td>Jonathan Nay</td>
<td><a href="mailto:jon.nay1@givegab.com">jon.nay1@givegab.com</a></td>
</tr>
</tbody>
</table>
How will you thank your donors?

- Start during and right after the day!
- Treat your donors like your heroes
- Talk about how their gift had a tangible impact, and what you were able to achieve as a result
- Review your donor data, compare it to previous years
- Watch the available training on Donor Stewardship!
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
- Palmetto Giving Day Downloadable Graphics
- Resources for Board Members and P2P Fundraisers
- Blog Articles and How-To Videos from GiveGab
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
Final Checklist

- Complete your profile ASAP
- Ensure you are verified to collect donations
- Keep an eye out for important emails!
- Follow Palmetto Giving Day on Social Media and use #PalmettoGivingDay Hashtag
- Watch on-demand training course videos
- Check out the Nonprofit Toolkit

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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

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

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