

Final Steps to Success

May 7, 2024


PALMETTO
GIVING DAY

GiveGab is becoming  Bonterra.

This training is pre-recorded

If you have questions or comments throughout our training, please reach out to our Customer Success team by chat, or by email at CustomerSuccess@givegab.com!



Agenda



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

Palmetto Giving Day Updates and Reminders



- palmettogivingday.org | May 7 - 8
- Donations open **May 7 at 6AM** and close **May 8 at 6PM**
- Social Media Feed
- Prizes/Matches/Challenges

Your Success Checklist

- ✓ Ready for Donations?
- ✓ The Perfect Profile
- ✓ Gamify with Matches & Challenges
- ✓ Engage Ambassadors
- ✓ Prepare Communications



Are You Able to Accept Donations?

✓

Add Your Organization's Info

>

✓

Add Your Story

>

✓

Get Verified to Collect Donations

✓

Status: Verified

Hooray! Your organization has been verified to accept donations on GiveGab.

✓

Confirmed state fundraising compliance

✓

Bank account and organization information verified

Are You Able to Accept Donations?

- ⚙️ Manage Organization ▾
- Edit Information
- Add Administrator
- Bank Account & Verification**
- Supporters
- Documents
- Surveys
- Edit General Donation Form

Payment Processor Verification

Organization Information

Business Name: [REDACTED]

EIN: [REDACTED]

Organization Representative: [REDACTED]

Need to update your organization representative? Please fill out this form [here](#).

Bank Information

Bank Name: [REDACTED]

Checking Account: [REDACTED]

Routing Number: [REDACTED]

Once your organization's information has been submitted, only the organization representative can request a change be made. If you need to update any of this information, contact us!

Please note: Donation payouts will show up as "GiveGab.com" on your bank account statement.

Additional Information Required

Some additional information is required in order to verify your organization to accept payments.

Update Required Information



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!

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

Video Url

Paste Youtube or Vimeo Link Here

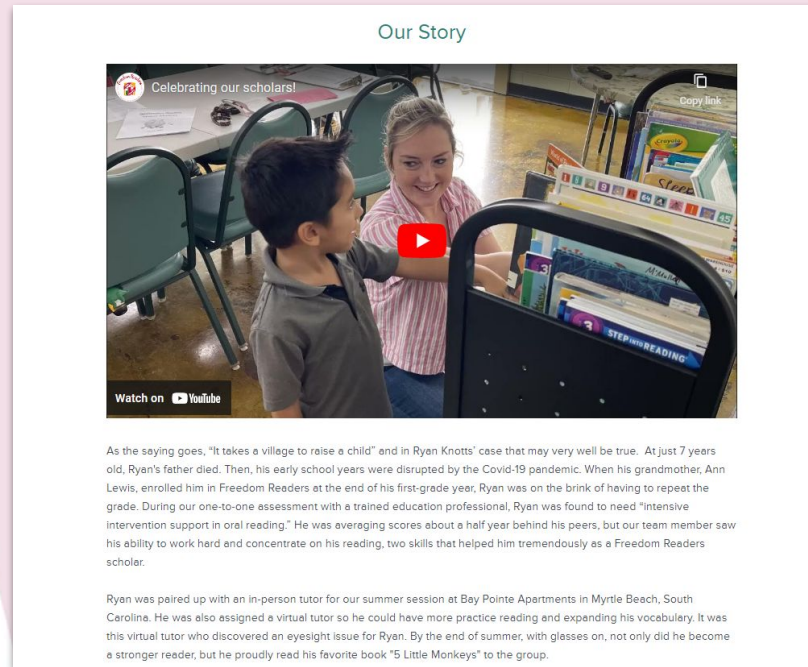
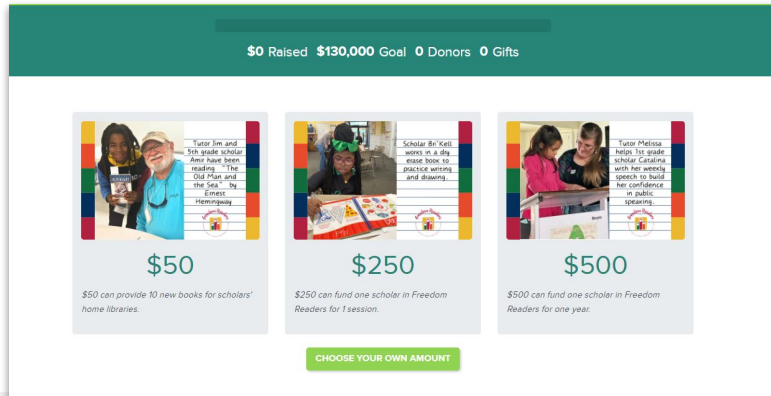
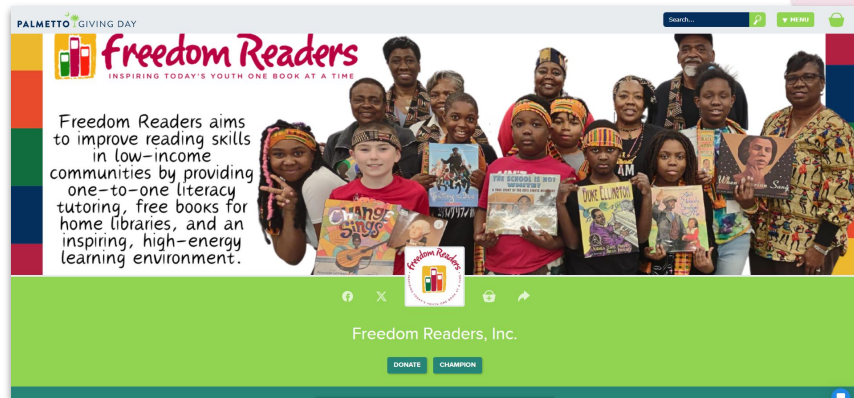
Vimeo links must be in the following format: **https://vimeo.com/123456**.

Search Keywords

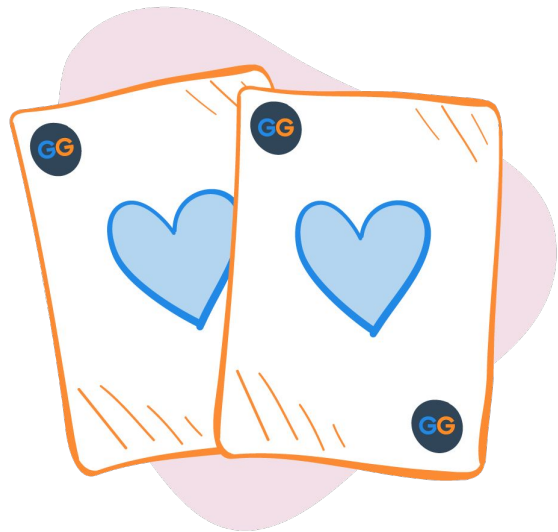
Enter space-separated search keywords

Note: Search Keywords optimize search results on the campaign website. Add terms relevant to your organization that are not captured in your story, name, or selected causes, as search functionality accounts for those.
Example: dog rehoming, foster, senior cats

Is Your Profile Complete?



Have You Secured a Matching Gift?



- **Why?**
 - In 2023, Palmetto Giving Day organizations that had matching funds raised **6.9 MORE** than those that didn't!
- 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: Ratioed 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.

Matching Ratio ⓘ

New: Gift- Based 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?

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 chat support
- ✓ 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 a champion
- **Pro Tip:** [Watch the Peer-to-Peer Fundraiser training video](#)



Champion Leaderboard



Leaderboards for Palmetto Giving Day

Select a leaderboard to view:

Champions

Name	Amount Raised ▼	Donors
1. [Redacted]		0
2. [Redacted]		0

New: Shorten P2P URL



Share Socially

Share Your

Page!

<https://www.palmettogivingday.org/p2p/>

Short URL:

<https://www.palmettogivingday.org/s/>

Create



Setting Up For Success

- Set up a quick info session for Ambassadors and 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 P2P 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 [Palmetto Giving Day Nonprofit Toolkit](#)



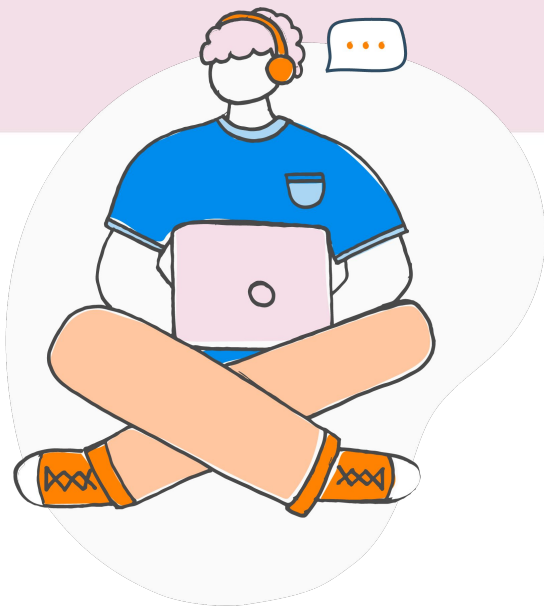
How Will You Communicate?



- 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

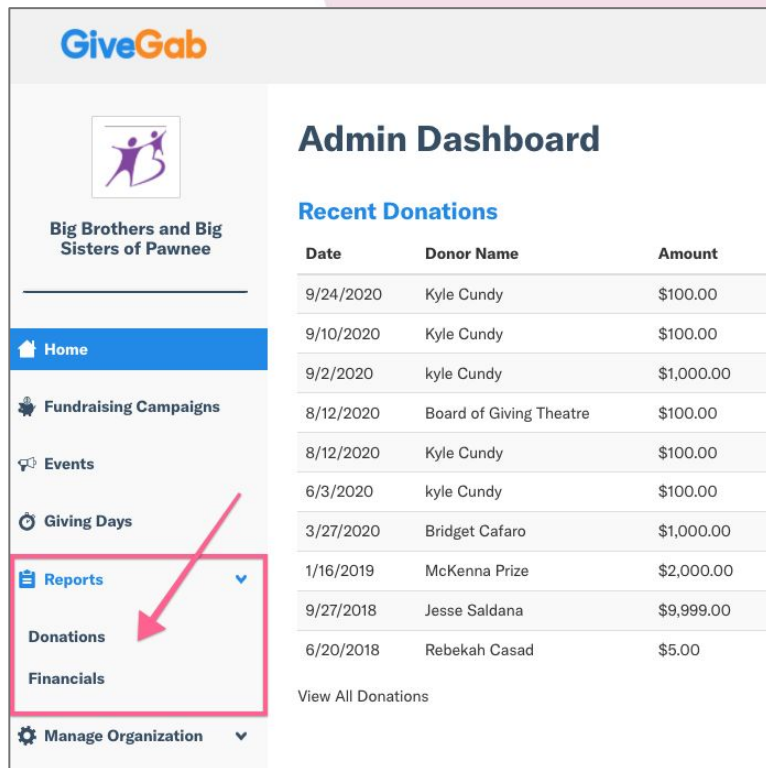
Post-Palmetto Giving Day Success

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 “Bonterratech”
- 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

 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](#)


All Giving Days & Community Giv ▾


All Campaigns ▾




Any Donation Type ▾

 Start














 End



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
<div>< > Page 2 of 2</div> <div> Export CSV Edit Bank Account Info</div>				


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

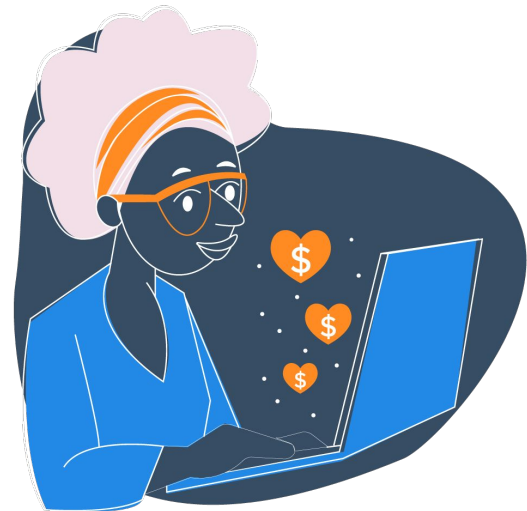
Gross Amount: ⓘ	\$4,275.00
Net Amount: ⓘ	\$4,199.23
Total Number: ⓘ	33
Givegab Platform Fees: ⓘ	\$136.88
GG Pay Processing Fees: ⓘ	\$109.39

Current

Total balance: ⓘ	\$200.00
Pending refunds:	\$0.00
Pending disputes: ⓘ	\$0.00
Total in reserve: ⓘ	\$0.00
Total balance to payout: ⓘ	\$200.00

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 Giving Day 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
- How-To Videos on the Palmetto Giving Day Trainings page



Next Steps

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 fundraisers
- Secure potential matches
- Develop a stewardship plan for your donors

Final Checklist

- 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



Share posts on
Instagram to
be featured on
site!

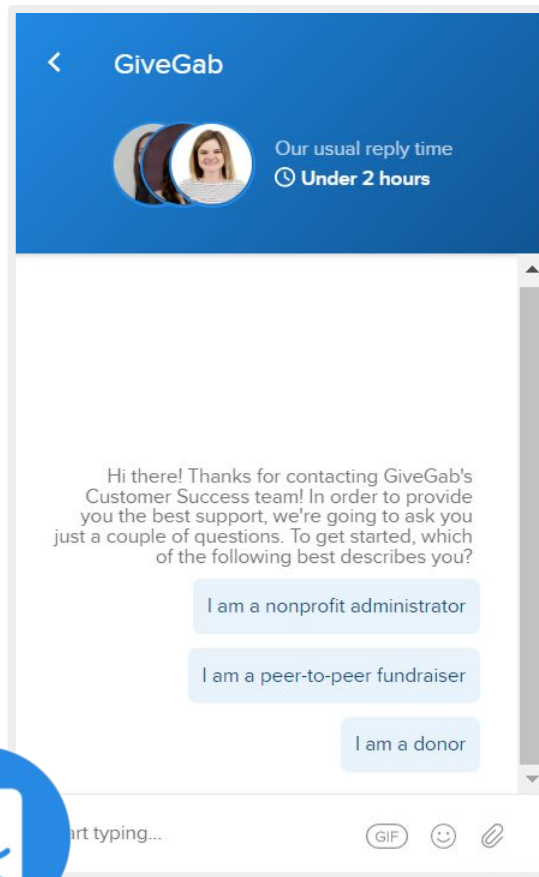
How We Support You

Visit our [Help Center](#)

Check out [Our Blog](#)

Send us an email at
CustomerSuccess@GiveGab.com

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



Thank you & Happy Fundraising!

May 7-8, 2024

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