

2025 TRAINING DAY



COMMUNITY
FOUNDATION
of
ORANGE and SULLIVAN

SPONSORS



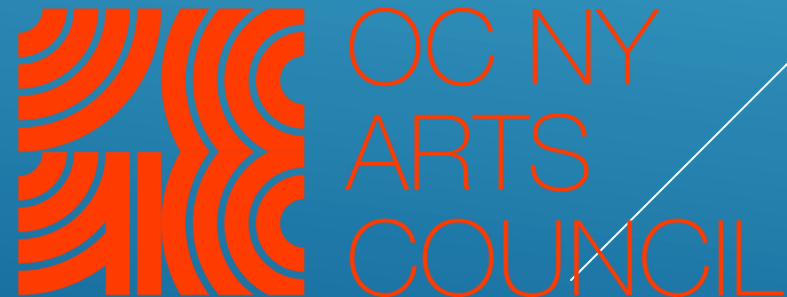
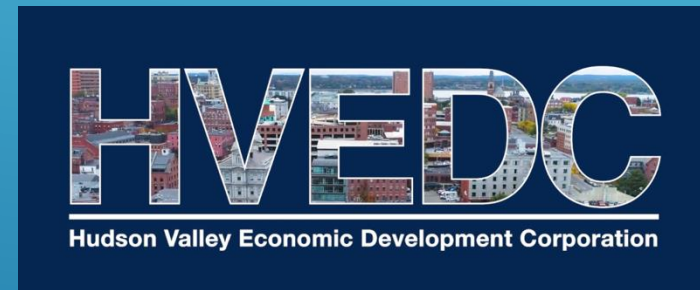
| Catskills • Hudson Valley



Kendrick, Coakley & McGimpsey



NETWORK LEADERS



AGENDA

- DASHBOARD REVIEW
- TIMELINE
- MATCHES & CHALLENGES
- PEER-TO-PEER-FUNDRAISERS
- MAY 21 GAME PLAN
- RESOURCES
- Q&A

DASHBOARD SETUP

The background features a blue gradient. A faint, large circular seal is visible, containing a bridge and some text. In the bottom right corner, there are several white diagonal lines of varying lengths.

WELCOME TO THE DASHBOARD!



Hudson Valley Gives May 21, 2025

\$0.00 Raised · 0 Donors · 0 Gifts

Analytics

Get Set Up

Complete the steps below to be sure that you are set up and ready to participate in Hudson Valley Gives.



Add Your Organization's Info



Add Your Story



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.

Donation Tools



Manage Matches and Challenges



Manage Donations



Embed a Donate Button

Get Prepared



Webinars and Workshops



Giving Day Toolkit



Help Center

54 Days to Launch

Participation Approval Status

Approved

Woohoo! You are approved to participate in the 10th Annual Hudson Valley Gives! What's next? -Check out our [trainings page](#) and sign up for an in-person/online session. Past trainings will have slides posted for reference! -Set up your dashboard! This includes recruiting peer-to-peer fundraisers, matching donations and/or challenges. -Visit our [nonprofit toolkit](#) for more resources! -Follow Hudson Valley Gives on Facebook and Instagram for tips and updates. Questions? Please use the blue chat bubble for support.

Other Actions



Engagement Opportunities



Add External Fund



Manage Support Areas



View Registration Info



View Your Profile



Mobilize Integration

Share Your Page

<https://www.hvgives.org/organizations/cfosny>



FIRST THING'S FIRST

ARE YOU APPROVED?



54 Days to Launch
Participation Approval Status

Approved

Woohoo! You are approved to participate in the 10th Annual Hudson Valley Gives! What's next? -Check out our trainings page and sign up for an in-person/online session. Past trainings will have slides posted for reference! -Set up your dashboard! This includes recruiting peer-to-peer fundraisers, matching donations and/or challenges. -Visit our nonprofit toolkit for more resources! -Follow Hudson Valley Gives on Facebook and Instagram for tips and updates. Questions? Please use the blue chat bubble for support.

NO?

MAKE SURE YOU ARE DONATABLE!



- Home
- Giving Days
- Reports
- Manage Organization
 - Edit Information
 - Add Administrator
 - Bank Account & Verification
 - Supporters
 - Documents
 - EveryAction CRM Integration
 - Mobilize Integration

YES?

GREAT! NOW LET'S BUILD YOUR PROFILE!

ADD YOUR ORGANIZATION INFO



Add Your Organization's Info

Website

<http://www.cfosny.org>

Logo



Select Image

Remove

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

Causes (optional)

Cause #1 Community Advocacy

Cause #2 Social Justice

Cause #3 Education


Save

ADD YOUR STORY

✓

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

Tell Your Story

Formatting ▾

B

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Since 1999, the Community Foundation has worked with individuals, families, groups of friends and local businesses to establish more than 430 charitable funds to support various community based projects and events. Our mission of **connecting people who care with causes that matter** is at the effective donor stewardship and prudent oversight of our growing scholarship and grant making program! We exist to enrich our community in all areas, and our family of funds have distributed over \$30 million in scholarships and grants to support hundreds of life changing organizations. Your support

Note: Pasting text from an outside source 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

https://www.youtube.com/XfOKIRGHg68

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

Save

ADD DONATION LEVELS

☒ Add Donation Levels


We recommend having 3 or 4 donation levels.

Dollar Amount

\$ 5.00

Description

Image




Select Image Remove

Image should be 5MB max and a JPG, JPEG or PNG file type.
Recommended dimensions: 600x400.

TELL YOUR DONOR WHAT THEY ARE SUPPORTING!

- BE SPECIFIC!
- USE PICTURES AND DESCRIPTIONS

ADD A 'THANK YOU' MESSAGE

 Add a 'Thank You' Message

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


Thank You Message

Thank you for your investment in our community through your generous donation! Thousands of individuals, families, businesses, and nonprofit organizations have chosen to work through the Community Foundation of the South, connecting people who care with causes that matter and we thank you!

Youtube or Vimeo Link

<https://www.youtube.com/embed/XfOKIRGHg88>

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: 800x800


Donation Disclaimer


Your disclaimer will appear at the bottom of the donation receipt.

Save


TEST IT! VIEW YOUR PROFILE HERE


Other Actions


 Engagement Opportunities

 Add External Fund

 Manage Support Areas

 View Registration Info

 View Your Profile

 Mobilize Integration



TIMELINE

The background features a blue gradient. A faint, large circular seal is visible, containing a stylized mountain range and a traditional Chinese building. Several white diagonal lines cross the right side of the image.

APRIL

PROMOTE

- ASK YOUR BOARD, STAFF, VOLUNTEERS TO ADD DETAILS TO SOCIAL MEDIA
- ADD HUDSON VALLEY GIVES TO YOUR NEXT NEWSLETTER OR WRITE A PRESS RELEASE
- DESIGN AND ORDER MAILERS TO SEND IN EARLY MAY

SOLICIT SPONSORS

- PUT OUT YOUR ASKS FOR SPONSORS
- ACQUIRE IN-KIND GIFTS TO INCENTIVIZE DONORS
- ADD MATCHES AND CHALLENGES TO YOUR DASHBOARD

MAKE A PLAN

- FILL IN YOUR DASHBOARD – MAKE IT FULL!
- PLAN AND STRATEGIZE AROUND YOUR DONOR BASE AND HVGIVES PRIZES
- SET GOALS AND SETUP FUNDRAISERS

MAY

PROMOTE

- SCHEDULE SOCIAL MEDIA POSTS
- CHANGE YOUR ORGANIZATION'S PROFILE PICTURE OR ADD A BUTTON TO YOUR WEBSITE
- SEND MAILERS OR HANG FLIERS AT LOCAL ESTABLISHMENTS

SPONSOR CARE

- ORDER THANK YOU CARDS OR SEND THEM SWAG
- TELL THEM HOW TO GET INVOLVED: SHARE POSTS ON SOCIAL MEDIA OR COME TO THE CELEBRATION OF SUCCESS ON MAY 21

MAKE A PLAN

- DOUBLE CHECK YOUR DASHBOARD
- SET THE EXPECTATION! TELL DONORS *WHEN* AND *HOW* TO GIVE
- PLAN AND HOST AN EVENT – BIG OR SMALL, ONLINE OR IN-PERSON!

MATCHES & CHALLENGES



WHAT IS A MATCHING GIFT?

- A match is a pledged donation that is used to incentivize giving by multiplying the impact of each donor's gift
- Matching gifts are secured in advance, and marketed with your general HVGives efforts

Ex. XYZ Business will match up to \$10 on each donation made to our organization on May 21st!

- These gifts sizes, but are usually larger than your average online donation
- Matches can come from anyone! Look at your existing constituents and connections

WHAT IS A CHALLENGE?

- Challenges are funds to be released to your organization total once a predetermined goal is reached
- Goals can be based on Donor Count, Dollar Amount, or Donation Count

Ex. When our organization receives 100 donors on May 21st, XYZ sponsor will contribute \$1,000!

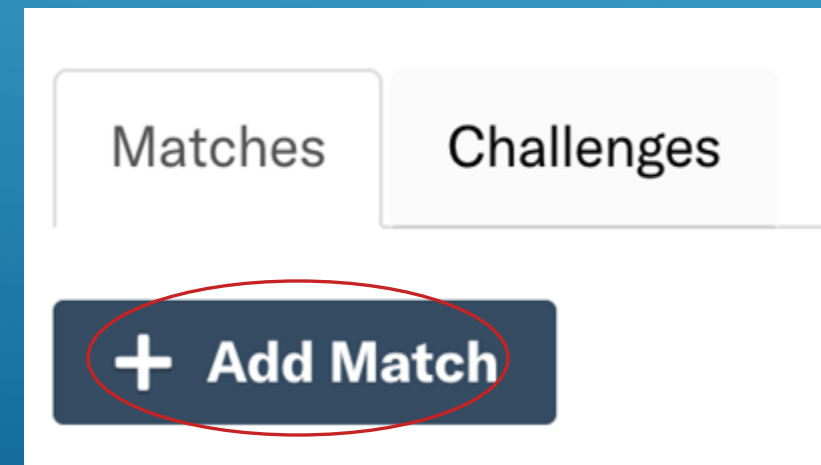
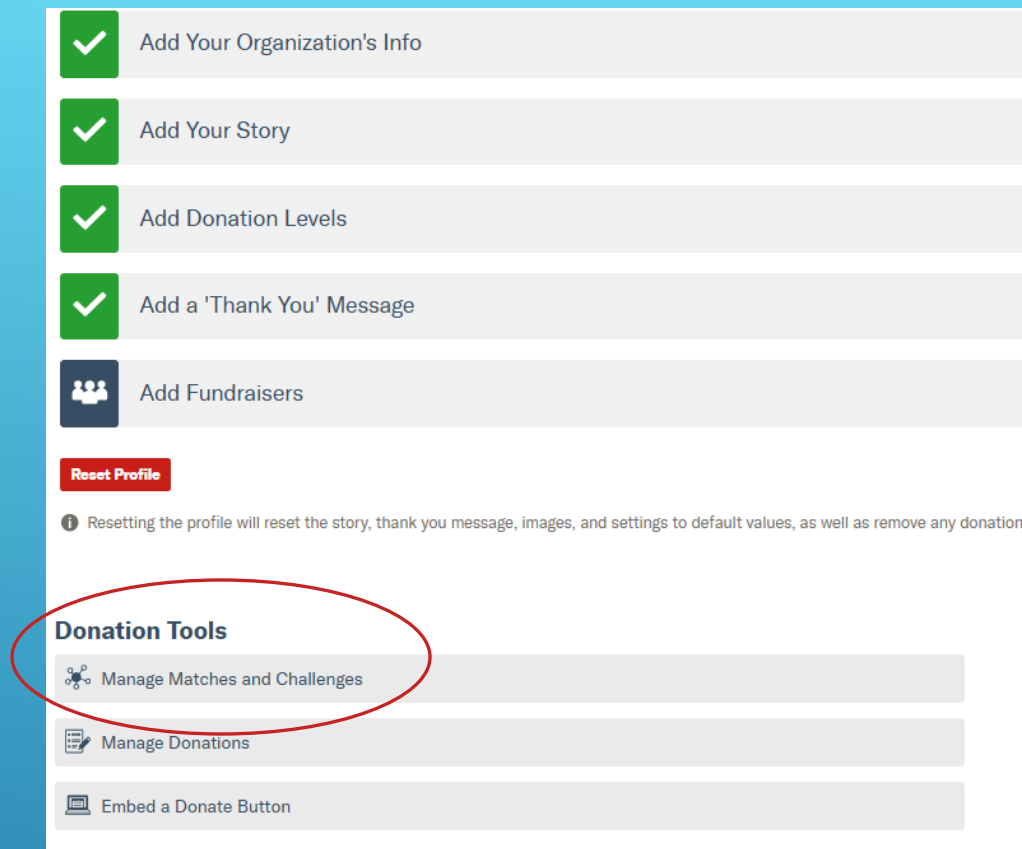
WHY SEEK A MATCH OR CHALLENGE?

- Incentivizes donors as their gift will have a greater impact
- Opportunity to highlight your business sponsor or major donor
- Organizations with matching funds raise on average 4.5 x more than organizations without a match

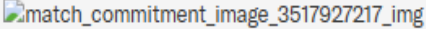
MAKE A PLAN

- Identify potential sponsors
 - Board Members, Fundraisers, Major Donors, Like-minded businesses
 - Pro tip: Pool together contributions to make a larger match!
- Make the Ask!
 - Look at 2024 numbers or, if new, outline your goals and share it with potential sponsors. Base your asking amount off that!
 - Don't hear back after a couple weeks? Follow-up!
- Get a "no"? That happens! Propose a non-monetary way to engage and try again next year!

ADDING TO DASHBOARD



HOW MATCH AND CHALLENGE DETAILS ARE ENTERED

Match Name <input type="text"/>	Image  <input type="button" value="Select Image"/> <input type="button" value="Remove"/>
Description <input type="text"/>	Tip: Disable adblockers on this page for the best image uploading experience.
Total Matching Funds Available ⓘ <div>\$ <input type="text"/></div>	
Matching Ratio ⓘ <p><input checked="" type="radio"/> 1:1 example: \$10 donation is matched by \$10</p> <p><input type="radio"/> 2:1 example: \$10 donation is matched by \$20</p> <p><input type="radio"/> 3:1 example: \$10 donation is matched by \$30</p>	

HOW DETAILS APPEAR



Anonymous: Donor Dollars

[Earth Angels Believe Foundation](#)

A new friend believes we can make a difference!!

\$250 MATCH

\$250 REMAINING



Mid-Hudson Valley Federal Credit Union: Matching your Moolah

[Earth Angels Believe Foundation](#)

You can bank on Mid-Hudson Valley Federal Credit Union for helping us raise a lot of money!

10 more donors unlocks \$2,000

ENTER SPONSOR DETAILS

Sponsor Donor Details

Sponsor Donor Name

Sponsor Donor Name is for your reporting purposes and will not display publicly unless you check the box below.

☐ Display Sponsor Donor Name Publicly

Sponsor Business URL (optional)

MATCH CRITERIA

- Time start and end, maximum match & auto matching (recommended)

Does this match only apply to donations made within a certain time period? (optional)

Time Zone

Eastern Time

Start Time (US/Eastern Time)

End Time (US/Eastern Time)

Minimum Individual Donation Threshold to Match ⓘ

Maximum Match per Individual Donation

☒ Enable Auto Matching ⓘ

☐ Archive ⓘ

CHALLENGE CRITERIA

- Time start and end, type (donor count, donation count, dollars raised) & goal

Select the time period applicable for this challenge

Time Zone

Eastern Time

Start Time (US/Eastern Time)

End Time (US/Eastern Time)

Challenge Type

Dollar Challenge

Challenge Goal





How many dollars are needed to complete this 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.

☐ Archive ⓘ

IMPORTANT NOTES

- If some matching funds are left “unused” you must click **deplete** to release remaining match to your grand total

Starts	Ends
5/21/2025 6:00am	5/21/2025 12:00pm
A new friend believes we can make a difference!!	
 Edit	 Archive
 Remove	 Deplete Match

- Be cognizant of the time frames you set for your matches/challenges
- Not sure if it's right? Ask GiveGab to review

SAMPLES

MATCHES

AUTOMATIC

Morning Match!

All donations made from 8am - 9am will be DOUBLED thanks to our generous sponsor, Debbie's Pet Supply!

MANUAL

Social Superstars Match!

For every like this post receives, our generous board of trustees will donate \$1 up to \$1,000! Like and share today only and help us make a difference!

CHALLENGES

\$1,000 More Challenge

If the SPCA reaches their \$3,000 fundraising goal, PetSmart has agreed to contribute an additional
\$1,000!

100 Donors Challenge

PetSmart agrees to give
\$1,000 *to the SPCA once 100 unique donors have made their gift, or once the SPCA has received 200 gifts*

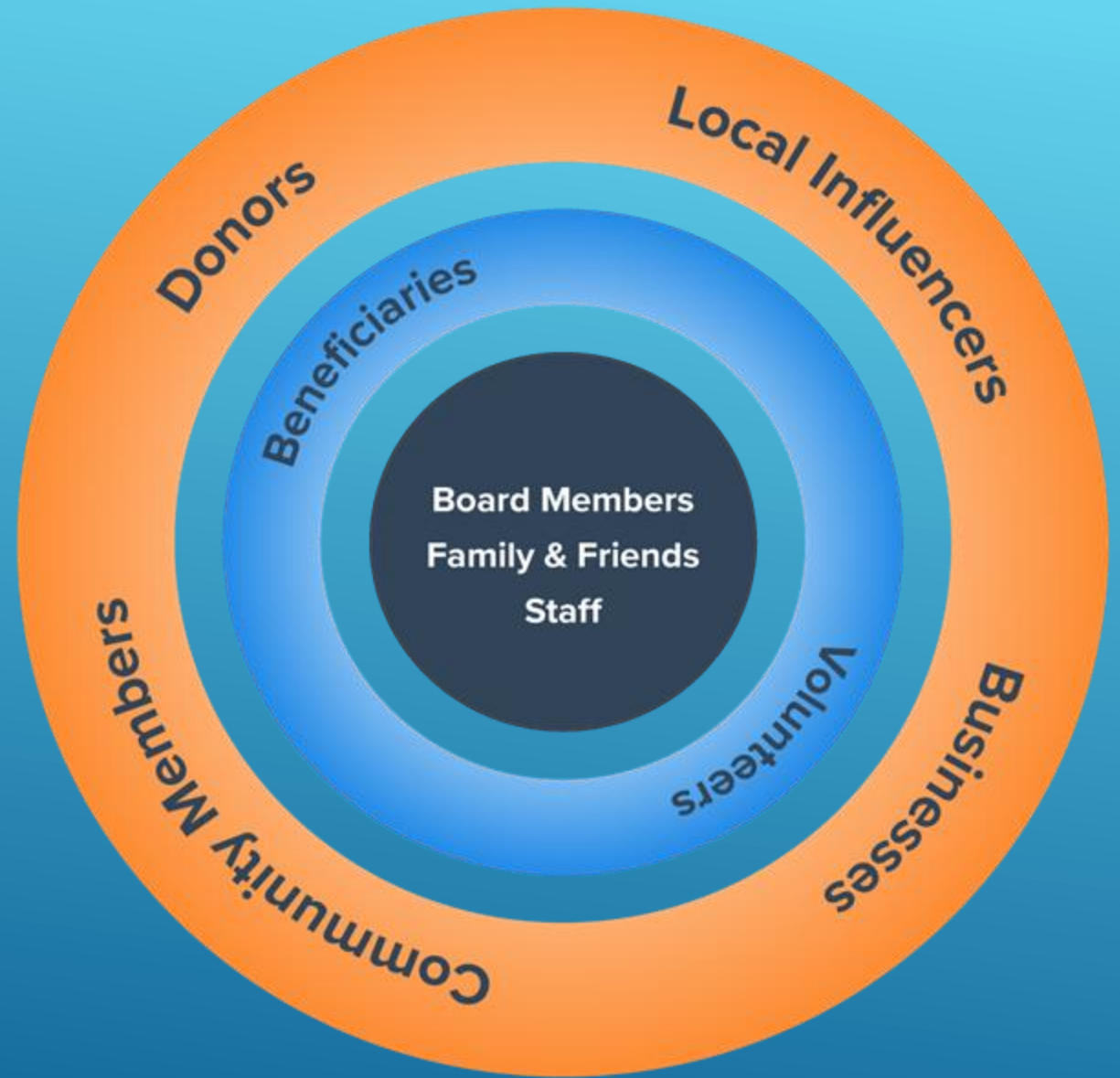
PEER-TO-PEER FUNDRAISING



WHAT IS P2P FUNDRAISING?

Peer-to-Peer Fundraising allows your most passionate supporters to create and host their own fundraising page right within your Hudson Valley Gives profile. Their totals roll up into your totals!

WHO TO ASK?





ASK THEM TO TELL THEIR STORY!

- What made you 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 or volunteering with our organization?




MAKE IT FUN!

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

INVITING FUNDRAISERS

 Add Fundraisers 

Search Fundraisers:

 Download CSV  Upload Fundraisers 

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

\$.00

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

Save




Add Fundraisers

Fundraiser Display Name (optional)

First Name

Last Name

Email



+ New Fundraiser

Cancel

Next: Compose Your Message

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!

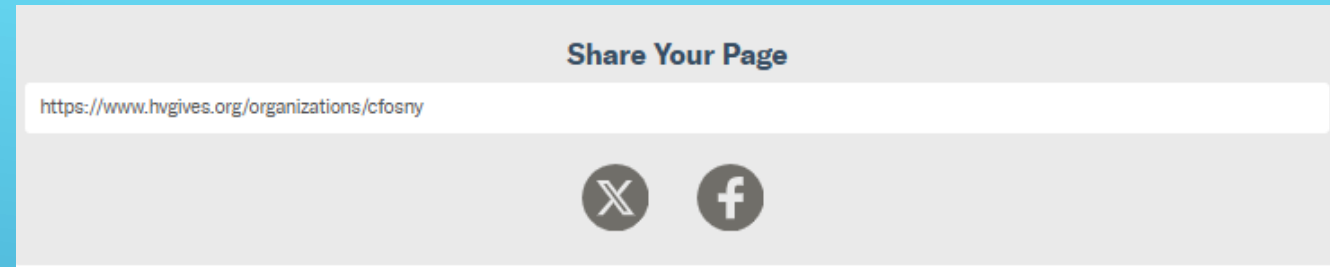
<https://giving-days.herokuapp.com/p2p/3>



MAY 21 GAME PLAN

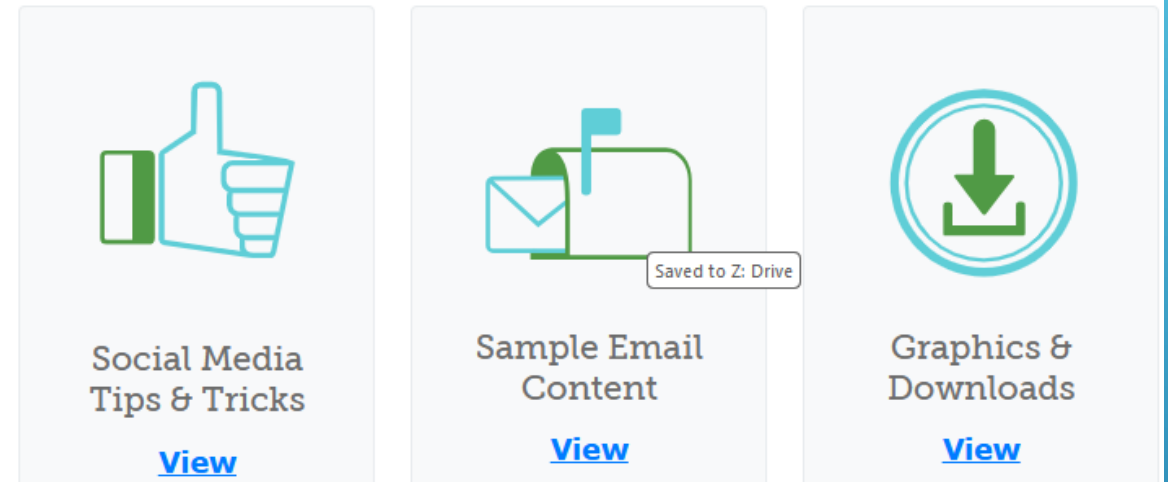


SOCIAL MEDIA



Nonprofit Toolkit

3. Spread the Word



Downloads here



HUDSON VALLEY GIVES CELEBRATION OF SUCCESS



NEWBURGH BREWING CO.

MAY 21, 2025

4-7PM



SCHEDULE SEND A THANK-YOU!

- Ask volunteers to help write notes to donors, sponsors, and P2P Fundraisers
- Publish a newsletter/press release
- Schedule or create a social media post!



Graphics &
Downloads

[View](#)



Sample Email
Content

[View](#)

RESOURCES

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SUPPORT SERVICES



Visit the [Help Center](#)

Check out the Bonterra [Blog](#)

Send Bonterra an email at
CustomerSuccess@GiveGab.com

Look for the little blue chat
bubble

IMPORTANT DATES

- **April 29, 2pm** – Final Steps Webinar
- **May 1** – Donation link opens
- **May 16** – Profile Completion Deadline
- **May 21** – HVGives & Celebration of Success
- **May 31** – Donations close

PRIZES

- Golden Tickets (awarded at trainings)

- Eager Beaver
- 10th Anniversary Lucky Tokens
- Donor Dash Champions
- Drive Time Power Hours
- 10 out of 10 Anniversary Match by Resorts World Catskills
- Lunch “Break the Bank” Match with Walden Savings Bank
- Mid-afternoon Money Grab with MHVFCU
- The Sundown in Sullivan Surge
- Brew Crew with Resorts World at Newburgh Brewing Co.
- Philanthropic Photo

- Night Owl Power Hours
- Give at 10, Win Again!
- Rake it in with the Rowley Family Foundation
- Final Finisher
- The Host with the Most
- Rookies of the Year
- ‘24-25 Most Improved Medal
- Teamwork Makes the Dream Work
- Best in Show
- Seven County Stewards
- 10 YEAR TITAN
- The Podium

\$35,000 TOTAL

QUESTIONS?

Thank you for joining us!

