

Peer-to-Peer Fundraising Basics and Utilizing Matches/Challenges for Palmetto Giving Day

May 6, 2025



Agenda



- **Registration/Verification Overview**
- **Peer-to-Peer Fundraising basics**
- **Using the Giving Days Fundraising Tool**
- **Matches/Challenges**
- **Resources available to your organization**

Registering for Palmetto Giving Day





PALMETTO GIVING DAY

REGISTER



Find Your Organization

and participate in Palmetto Giving Day

 ×

1 Results



All4Paws
Pawleys Island, South Carolina

[PARTICIPATE](#)

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

ABCD



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





Palmetto Giving Day

Organization Name ** required*

Street Address Line 1 ** required*

Street Address Line 2

City ** required*

State ** required*

ZIP/Postal Code ** required*

Not located in the United States?

Logo



Select Image

Remove

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

Click 'Continue' to complete your registration for

Palmetto Giving Day

Continue



Palmetto Giving Day

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*

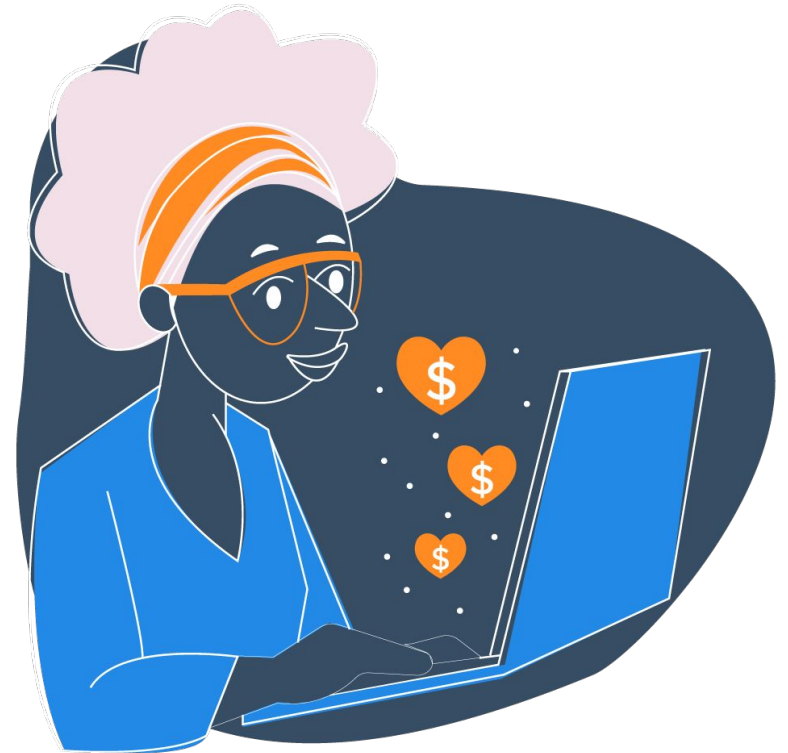
4. What is your organization's mailing address? ** required*

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!

The screenshot shows a user's profile page for Palmetto Giving Day. At the top, it displays the event name 'Palmetto Giving Day' for May 7-8, 2024, with a '140 Days to Launch' badge. Below this, the Palmetto Giving Day logo is shown alongside statistics: '\$0.00 Raised', '0 Donors', and '0 Gifts'. An 'Analytics' button is visible. A 'Welcome to Another Giving Day!' message follows, explaining that as a returning user, they can copy over content and settings from a previous year's profile. Below the message is a card for the 'Palmetto Giving Day (2023)' profile, which includes a 'Copy This Profile' button. At the bottom of the page, there is a 'Create a New Profile' button.

Completing Your Profile



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 >
-  Add Fundraisers >

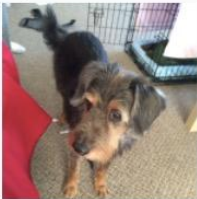
Basic Info

- 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




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

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

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

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 on GiveGab

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 on GiveGab



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.

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 20**, 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/>



What is P2P Fundraising?

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



Inviting Your Fundraisers

Demo

Navigate to your Fundraisers Tab in your Giving Day Dashboard.

Set a default story and goal for your P2Ps

Make fundraising invite-only, or open to anyone interested

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

\$.00

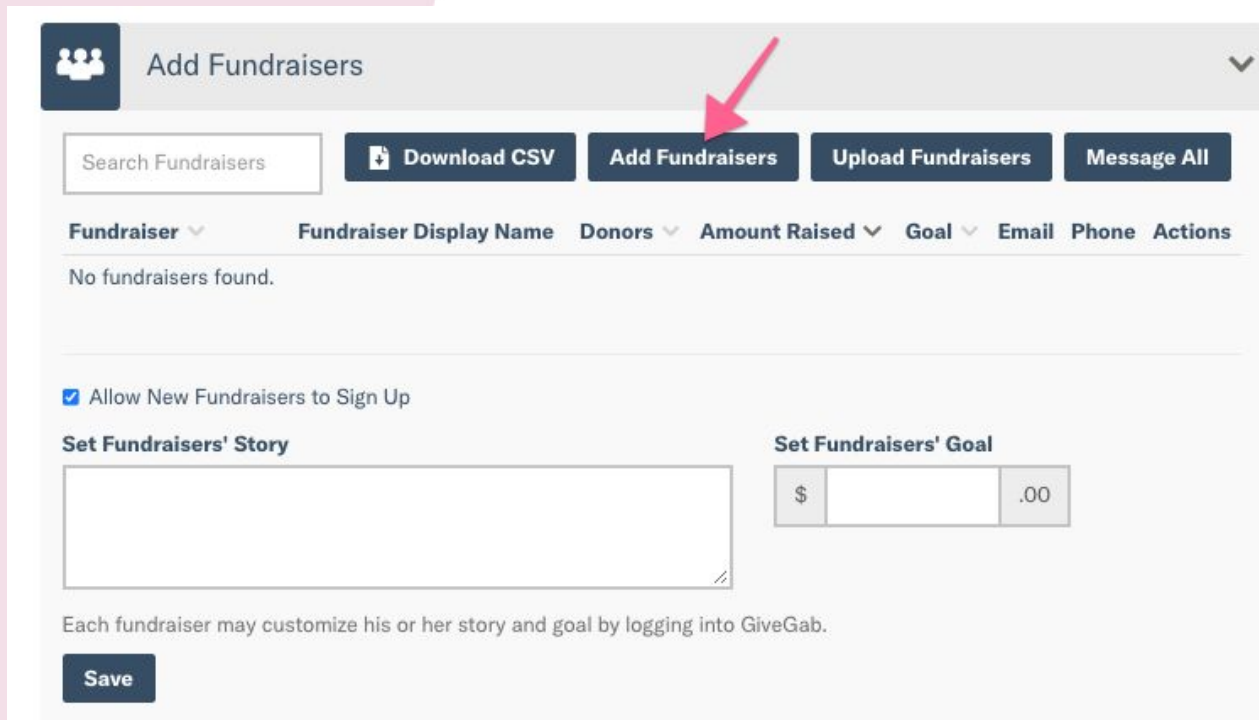
Each fundraiser may customize his or her story and goal by logging into GiveGab.

[Save](#)

Demo

Navigate to your Fundraisers Tab in your Giving Day Dashboard.

Select “Add Fundraisers”



The screenshot shows the 'Add Fundraisers' interface. At the top, there is a header with a group of people icon and the text 'Add Fundraisers'. Below the header, there is a search bar labeled 'Search Fundraisers' and four buttons: 'Download CSV', 'Add Fundraisers' (highlighted with a red arrow), 'Upload Fundraisers', and 'Message All'. Below the buttons, there is a table header with columns: 'Fundraiser', 'Fundraiser Display Name', 'Donors', 'Amount Raised', 'Goal', 'Email', 'Phone', and 'Actions'. The table content shows 'No fundraisers found.'. Below the table, there is a checkbox labeled 'Allow New Fundraisers to Sign Up' which is checked. There are two sections: 'Set Fundraisers' Story' with a text area, and 'Set Fundraisers' Goal' with a currency selector '\$' and a goal amount input field showing '.00'. At the bottom, there is a 'Save' button and a note: 'Each fundraiser may customize his or her story and goal by logging into GiveGab.'

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.


 Save

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


Fundraiser Dashboard




Tell Your Story




Make a Donation



Reach Out

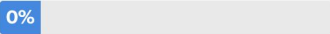


Share Socially



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>

Fundraiser Profile



PALMETTO GIVING DAY

Kalia Kornegay is a champion for
[Palmetto Giving Day Sample Organization](#)

DONATE

\$0 Raised \$1,000 Goal 0 Donors



I support this organization's mission and I want it to have a greater impact on the community.

\$25

\$50

\$75

\$100

CHOOSE YOUR OWN AMOUNT

Our Story

Please support our Palmetto Giving Day campaign!

Key Takeaways



- P2P Fundraising can help you raise 2x 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!

Matches & Challenges



The Basics



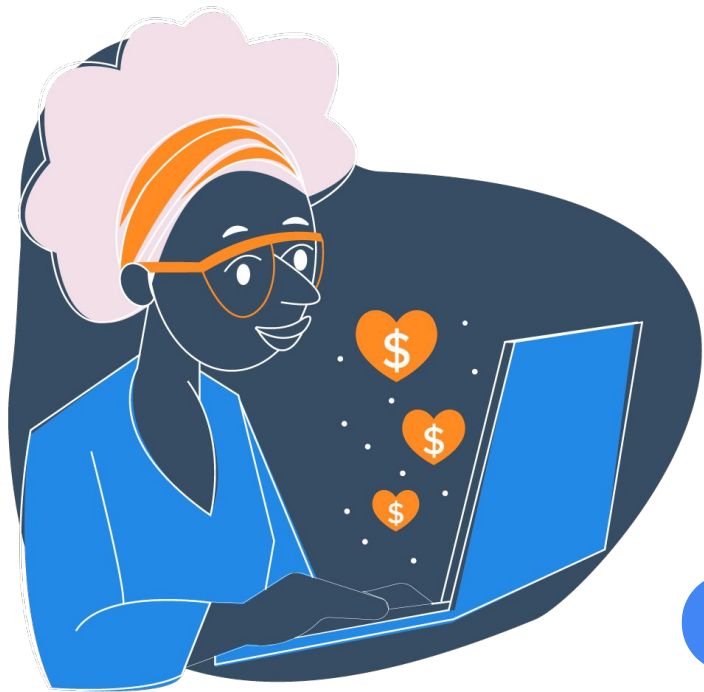
What is a matching gift?

- An additional donation pledged for each donation that is made to your giving day campaign
- Time-based to create a sense of urgency
- Promotional tool to incentivize donors of all capacities

Benefits of Matches & Challenges

- 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





Adding a Matching Opportunity to your Giving Day

Your Giving Day Dashboard

From your Giving Day Dashboard, click “Manage Matches and Challenges”

- ✓ 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.

Donation Tools

🔗 Manage Matches and Challenges

📄 Manage Donations

🖨️ Embed a Donate Button

Other Actions

📌 Engagement Opportunities

🔗 Add External Fund

📄 View Registration Info



Add a Match

Click the “Add Match” button to create a new matching opportunity to feature right on your Giving Day profile.

Matches

Challenges

+ Add Match

Enter Match Information

Match Details

Match Name

Giving Tuesday Match!

Description

Your donations will be DOUBLED on #GivingTuesday thanks to a generous match from our friends at Debbie's Pet Supply!

Total Matching Funds Available ⓘ

\$ 50.00

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

Image

 match_commitment_image_9939217026_img

Select Image

Remove

Tip: Disable adblockers on this page for the best image uploading experience.

- Match Name
- Match Description
- Matching Funds Available
- Matching Ratio
- Image (optional)

Enter Sponsor Information

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)

- Sponsor Name
- Sponsor URL (optional)
- Or keep your sponsor anonymous

Customize Your Match

Match Criteria

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)

Maximum Match per Individual Donation

\$

Enable Auto Matching ⓘ

Update Match Parameters

- Match Start Time (optional)
- Match End Time (optional)
- Maximum Match per Donation
- Auto Matching
 - Enables donation matching to eligible online gifts in real time

View Your Match

Debbie's Pet Supply: Giving Tuesday Match!

Your donations will be DOUBLED on #GivingTuesday thanks to a generous match from our friends at Debbie's Pet Supply!

\$50 MATCH

\$50 REMAINING



Adding a Challenge to Your Giving Day

Your Giving Day Dashboard

From your Giving Day Dashboard, click “Manage Matches and Challenges”

- ✓ Add Your Organization's Info >
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- ✓ Add Donation Levels >
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📄 View Registration Info

Add a Challenge

Click the “Add Challenge” button to create a new matching opportunity to feature right on your Giving Day profile.

Matches

Challenges

+ Add Challenge

Enter Challenge Information

- Challenge Name
- Challenge Description
- Challenge Unlock Amount
- Image (optional)

Challenge Details

Challenge Name

Giving Tuesday Challenge!

Description

When we reach 10 donors, \$50 will be unlocked thanks to a generous donation from our friends at Debbie's Pet Supply!

Challenge Unlock Amount ?

\$ 50

Image



Select Image

Remove

Tip: Disable adblockers on this page for the best image uploading experience.

Enter Sponsor Information

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)

- Sponsor Name
- Sponsor URL (optional)
- Or keep your sponsor anonymous

Customize Your Challenge

Set Challenge Details

- Start Time
- End Time
- Challenge Type
 - Dollar
 - Donor
 - Donation
- Challenge Goal

Challenge Criteria

Select the time period applicable for this challenge

Time Zone

Eastern Time

Start Time (US/Eastern Time)

End Time (US/Eastern Time)

Challenge Type

Donor Challenge

Challenge Goal

10

How many donors are needed to complete this challenge?

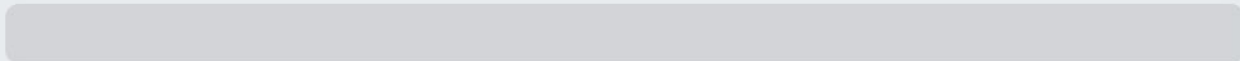
Archive **i**

Save **Cancel**

View Your Challenge

Debbie's Pet Supply: Giving Tuesday Challenge!

When we reach 10 donors, \$50 will be unlocked thanks to a generous donation from our friends at Debbie's Pet Supply!



10 more donors unlocks **\$50**

Important Tips

- A Match or Challenge will remain active for the entire length of the set date and time parameters
- If you did not meet the amount necessary to deplete the match, but wish to release the entire sponsored amount, select “Deplete Match”
- If you no longer wish to display your match or challenge, select “Archive”

Giving Tuesday Match! Sponsored by Debbie's Pet Supply

Total Amount Amount Remaining  Auto-Matching Enabled
\$50.00 **\$50.00**

Your donations will be DOUBLED on #GivingTuesday tha...



Edit



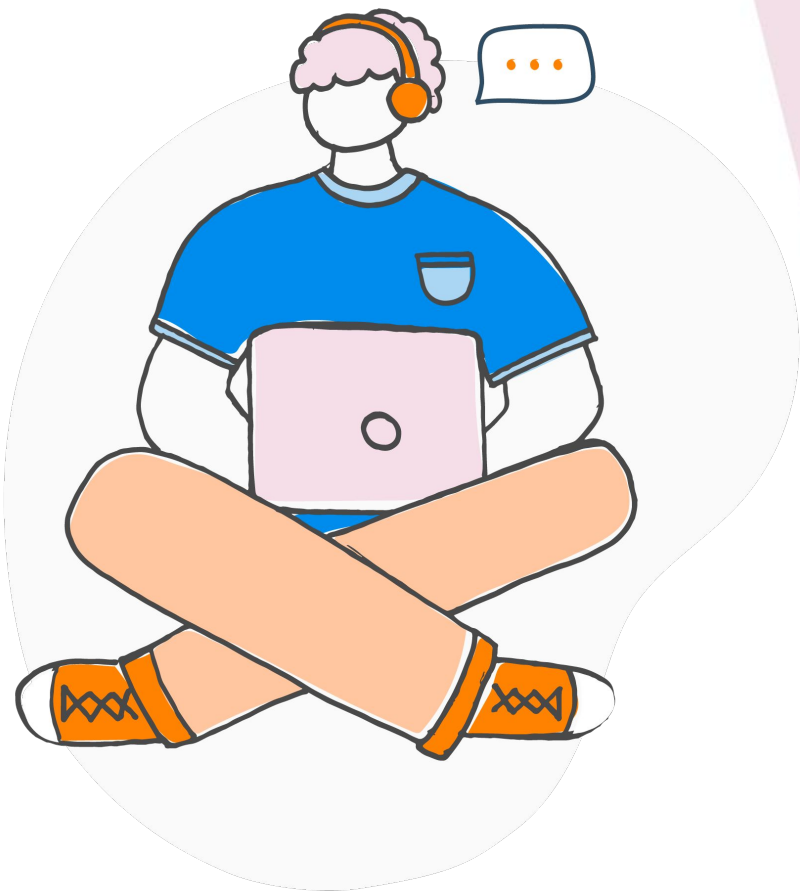
Archive



Remove



Deplete Match



Resources

Giving Day Support & Resources

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

GiveGab is becoming  Bonterra.

