Final Steps to Success

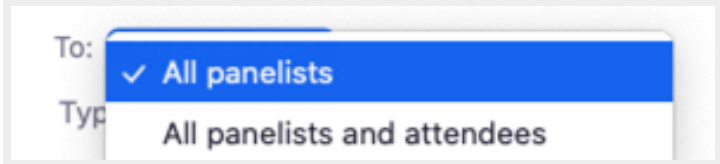May 1-2, 2025

Submit Your Questions!

This is being recorded. The recording will be available on the /trainings page by **end of day**

If you have questions or comments throughout our training, please write in using your Zoom webinar attendee panel.
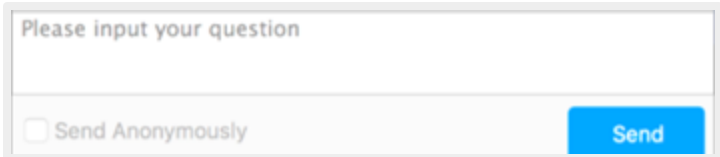
Introduce yourself! Name, location, organization.

Chat Box

To:
✓ **All panelists**
Typ   All panelists and attendees

Q&A

Please input your question

☐ Send Anonymously   Send

Agenda

- **Give Local York Updates & Reminders**

- **Your Checklist for Success**

- **After Give Local York**

- **Next Steps**

- **Q&A**

Give Local York Updates and Reminders

- May 1st at 9 PM - May 2nd at 9 PM
- Stretch Pool & Prize info available now
  - Make sure you fill out the special prize form!
- Add your events to Facebook & make us co-hosts
- Add us a collaborators to your Instagram posts
- Livestream schedule is now available
- During the big day, please use marketing@givelocalyork.org for all your questions

Your Success Checklist

- ☑ **Ready for Donations?**

- ☑ **GLY365 Submitted?**

- ☑ **The Perfect Profile**

- ☑ **Gamify with Matches & Challenges**

- ☑ **Engage Ambassadors**

- ☑ **Prepare Communications**

Are you able to accept donations?

Will you have cash or check gifts?

- **Will be enabled on the day!**
- Add cash and check donations to your Give Local York totals
- See "Donation Tools" on your admin dashboard below your checklist
- Attribute to a support area or fundraiser
- Receipts can be sent to donors when an email address is included

Donation Tools

- Add Offline Donation
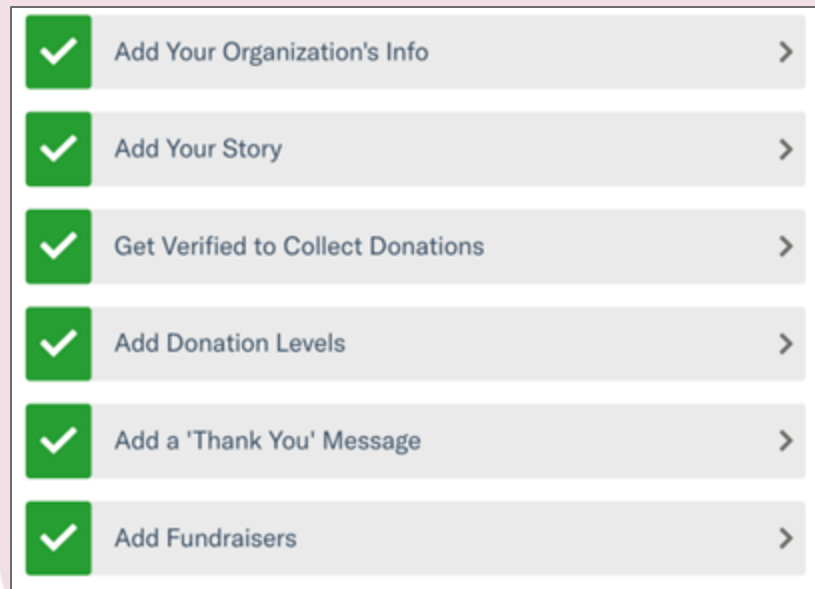- Manage Sponsor Matching
- Manage Donations
- Embed a Donate Button

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?

✓ Add Your Organization's Info

✓ Add Your Story

✓ Get Verified to Collect Donations

✓ Add Donation Levels

✓ Add a 'Thank You' Message

✓ Add Fundraisers

GiveGab is becoming Bonterra

Have you secured a matching gift?

- **Why?**
  - Organizations who set up a Match or Challenge for Give Local York raised on average **3x** 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

Your Matching To-Do List

- ☑ Identify sponsors to ask

- ☑ Secure commitment

- ☑ Add Matches and Challenges your Give Local York profile

- ☑ Verify your match setup with GiveGab support

- ☑ Curate communications to highlight your match

Are your supporters ready?

Do you have ambassadors?

- **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)
- Anyone can be an ambassador or a fundraiser
- **Pro Tip:** Watch the Peer-to-Peer Fundraiser training video

Setting Up For Success

- Set up a quick info session for Ambassadors and Peer-to-Peer Fundraisers

- Walk them through the **Give Local York 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 Give Local York 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-Give Local York Success
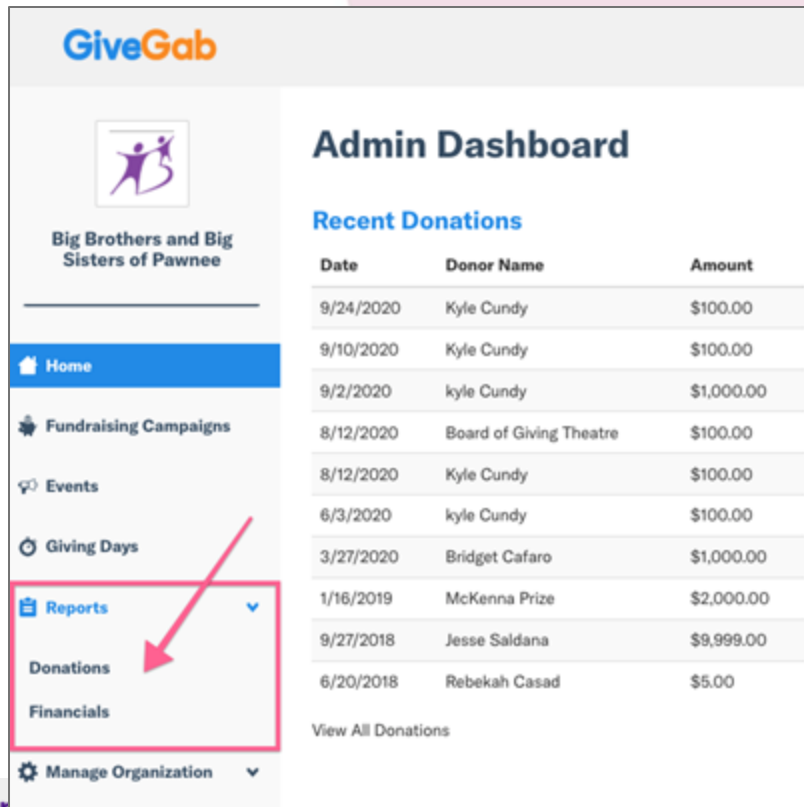
How will you get your donations?

- Donations will be deposited on a rolling basis 5-7 business days after a gift is made

- Deposits will appear on your account from "Bonterra"

- Reference your **new** Financials report to reconcile deposits!

Finding Your Donor Data

Filtering Your Data

Exporting Your Donor Data

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](#)
- [Give Local York Downloadable Graphics](#)
- Resources for [Board Members](#) and [P2P Fundraisers](#)
- [Blog Articles](#) and [How-To Videos from GiveGab](#)

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

Final Checklist

- Complete your profile
- Ensure you are verified to collect donations in GiveGab
- Keep an eye out for important emails!
- Follow Give Local York on Social Media and use #GiveLocalYork Hashtag
- Watch on-demand training course videos
- Check out the Nonprofit Toolkit

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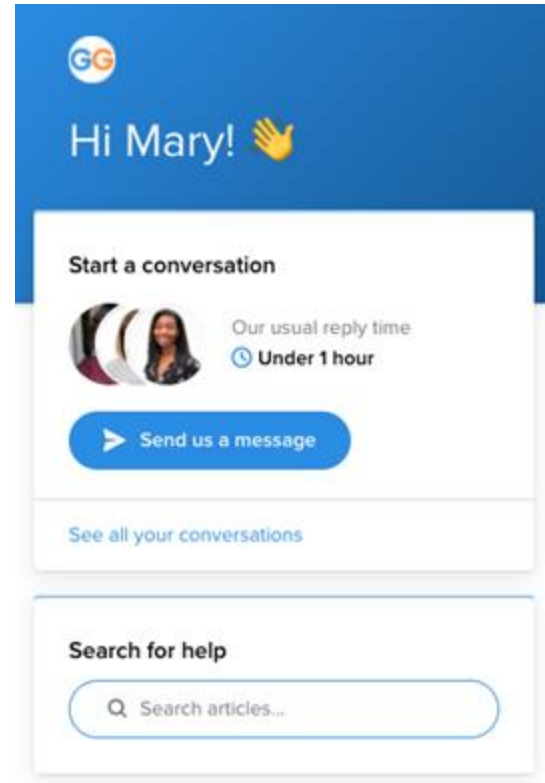
Chat with GiveGab's Customer Success Team whenever you have questions or need a hand! Just look for the little blue chat bubble.

Questions?

May 1-2, 2025