

# Final Steps to Success

May 1-2, 2025



GiveGab is becoming  Bonterra.

# Submit Your Questions!

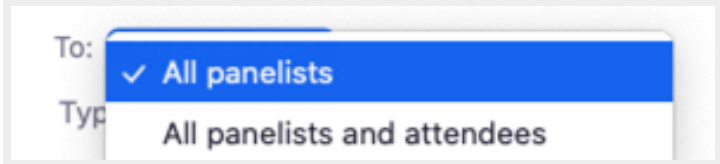
This is being recorded. The recording will be available on the /trainings page by **end of day**

If you have questions or comments throughout our training, please write in using your Zoom webinar attendee panel.

Introduce yourself! Name, location, organization.



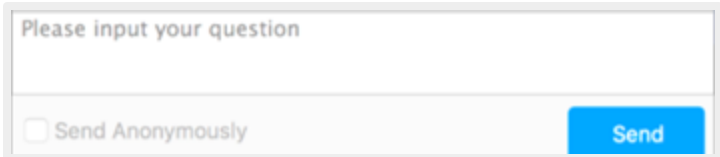
## Chat Box

A screenshot of a Zoom chat box. The 'To:' field is open, showing a dropdown menu with 'All panelists' selected and a checkmark. Below it, the text 'All panelists and attendees' is visible. The 'Type' field is partially visible on the left.

To:  All panelists  
Type: All panelists and attendees



## Q&A

A screenshot of a Zoom Q&A form. It features a text input field with the placeholder text 'Please input your question'. Below the input field is a checkbox labeled 'Send Anonymously' and a blue 'Send' button.

Please input your question

Send Anonymously

# 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](mailto: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?

- ✓ 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

# 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

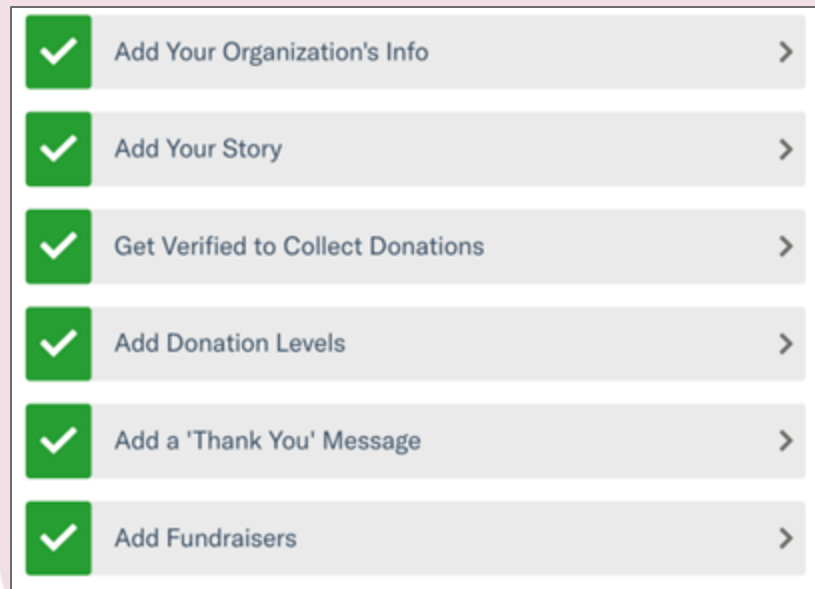


Embed a Donate Button

# 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?





# 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

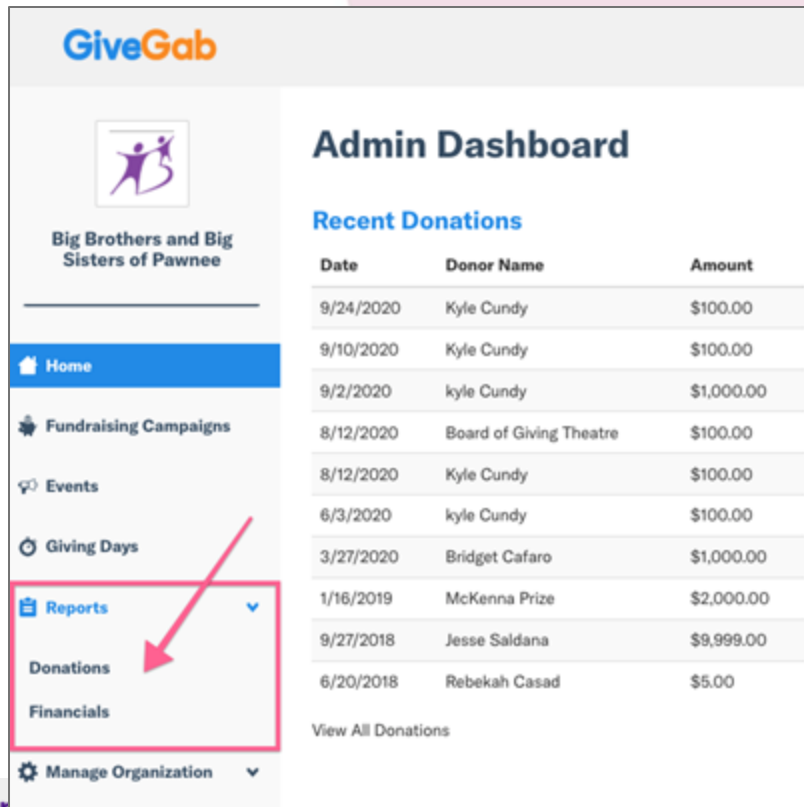


# How will you get your donations?



- 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



**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](#)

**GiveGab is becoming  Bontena.**

# Filtering Your Data

**Pawnee Public Library**

- Home
- Pawnee Gives (Support)
- Reports
- Donations**
- Manage Organization

## Donations

**i** 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 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

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 [Export CSV](#) [Edit Bank Account Info](#)

Viewing Dashboard for **Pawnee Public Library** 

# 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



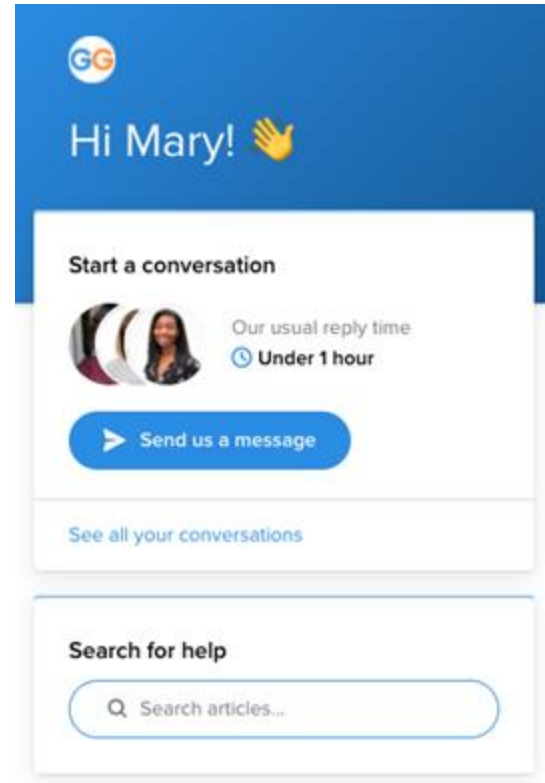
# Final Checklist


- 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](https://support.givegab.com)
- Check Out Our Blog
  - [givegab.com/blog](https://givegab.com/blog)
- Send us an Email
  - [CustomerSuccess@givegab.com](mailto: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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