

Pre-Fundraising Guide

Planning & Building

1. Prepare your team! Consider the support you will need.

Coordinate volunteers

- Select tech-savvy volunteers and set clear expectations for how they are needed to serve the organization at your fundraiser, the time commitment, and any perks you are offering in return.
- Review the GiveSmart User Role Permissions and add volunteers to your campaign with the appropriate limited administrative role of your choice.
- Provide training to your volunteers in advance to ensure they are knowledgeable in using the GiveSmart platform. Simply click the Resources button in the bottom right of your campaign, and select Event Team Resources to get started!
- **Optional:** Do you have a limited volunteer pool? Expand your circle of reach with Volunteer Match! Volunteer Match is a membership-based service that allows you to recruit individuals in your area looking to volunteer with organizations just like yours.
 - **HOW-TO:** Visit volunteermatch.org for more information.

Prepare your team with personalized service options.

- **Optional:** Overwhelmed at the thought of doing it all? Let our additional services put your mind at ease. Choose between Personalized Admin Training, Live Remote Services, Campaign Management or personalized Event Team Training.
 - **How far in advance?** We recommend securing your additional services as soon as possible since popular dates can fill up fast.
 - **+90 days pre-fundraiser** for Campaign Management.
 - **+30 days pre-fundraiser** for Event Team Training, Personalized Admin Training and Live Event Remote Services.
 - **HOW-TO:** Learn more about each of these services by clicking on the Resources button in the bottom right of your campaign, and select Event Team Resources. Already know what you want? Contact your Customer Success Manager to add an additional service today!

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Supplement onsite staff

- **Optional:** Short on volunteers? Contract friendly and professional event staff directly from our preferred staffing provider. Staff are trained in all basic functions of the GiveSmart platform to execute common tasks at your direction.
 - **How far in advance?** We recommend placing your order at least 30 days in advance as soon as you have confirmed your fundraiser date and number of staff required, but no less than 2 weeks prior, to ensure availability and allow adequate time for scheduling.
 - **HOW-TO:** Visit our Preferred Partners article in the Help Center to sign-up.
- Don't forget to add staff to your GiveSmart campaign as a Campaign Admin (or another user role you prefer) once they arrive. Visit our Help Center for more information on User Permissions.

Equip your team

- Your team will be able to assist donors from check-in to check-out using any internet-enabled device, including their phone! (**Note:** *Devices not equipped with a compatible swiper are subject to manual credit card entry only. Compatible swipers must be purchased through GiveSmart, and are compatible with Apple devices using the GiveSmart App only.*)
Remember: It never hurts to have a spare device and chargers on hand!
 - Swipers are never required for a successful fundraiser! Sending a text through the GiveSmart platform prompting guests to enter credit cards directly through their phone is a great contactless option.
- **Optional:** Rent iPads directly from Fello, our preferred equipment provider. As a perk, GiveSmart clients receive a bundled credit card swiper with each iPad rented.
 - **How far in advance?** We recommend placing your order as soon as you have confirmed your event date and number of iPads required, but no less than 2 weeks prior to your event date, to allow adequate time for shipping and testing the equipment you receive.
 - **HOW-TO:** Submit an order to Fello by visiting givesmart.fello.com. We recommend renting 1 iPad for every 50 guests.

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2. Set up for success! Advanced campaign site preparations for a smooth fundraiser.

Ticketing, seating and bidder numbers.

- **For ticketed fundraisers:** Create multiple ticket types for different user experiences (Virtual or In-Person). By creating multiple ticket types, including tickets with a \$0 value, allows you to segment messaging groups and send custom messages to both your in-person and at-home guests.
- **For ticketed fundraisers:** Approx. 1 week in advance, send an Assignment Reminder email via the ticket orders page to remind purchasers who have unassigned tickets in their order to update their order with their guests' names.
- **For ticketed fundraisers:** Approx. 3 days in advance, send a Confirmation Reminder via the ticket orders page to encourage attendees who have not confirmed their ticket to accept their invitation to attend and complete registration.
- **For In-Person Events:** Consider pre-assigning bidder numbers to avoid typos that could occur if assigning on the spot at the registration table. Reduce clutter at the registration table and create a custom user field to add table assignments that can be shared upon check-in.

Visually engage supporters through donation and/or bids displays.

- Consider potential donor's feelings when considering whether or not to display bidder/donor names alongside dollar amounts in a display.
- **For In-Person Events:** Share your display link with your AV team and test it prior to your event.
- **For Virtual Fundraisers:** Embed your display link in a Presentation Page or in a custom section on the Home Page.

Plan a Communication Strategy.

- GiveSmart offers many templated text messages you can send to preselected groups of users containing key information or instructions.
- Draft any custom texts within the platform to ensure your message plus any campaign link fits within the 160 character limit- don't forget to check spelling and grammar!
- Consider scheduling text messages to automatically send if they will not be tied to specific moments in your program.

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3. Fundraiser Planning! Optimize the logistics of the donor experience.

Promote your campaign!

- Build the excitement leading up to your fundraiser by promoting it early and often! Start ticket sales a few months prior, offer early-bird discounts for those who purchase a ticket within in the first few weeks.
- If a silent auction is included, we recommend starting the auction 5-7 day pre-fundraiser to get your guests engaged and familiar with the platform. We have seen great success in our fundraising campaigns when the auction is open prior to the big day!
- Share your site URL, found on the Dashboard, through Social Media or message your guests from last year by sending them a text or email from your old site with a link to the new one. Take advantage of the communication resources found within your GiveSmart site.

Efficiently check-in guests by choosing between a contactless self-checkin or facilitate with staff and volunteers.

- Confirm or add an accurate mobile number for guests so they can participate in giving throughout the evening and receive text message updates.
- Confirm or add a credit card on file to secure bidding; guests can always change method of payment at checkout if you want to allow other methods.
- Organize any bidder paddles being handed out numerically and label with guest name. Keep a paper copy of table assignments as backup and reference for open seats to assign unexpected guests or accommodate changes.
- **For Self-Checkin:** send the Not Checked In template text message to guests a few minutes prior to the scheduled arrival time. Allowing them to verify their contact information and check themselves in as they arrive. NOTE: This message can be sent multiple times as a reminder, and our filtered recipient group will only message those guests who still need to checkin.

Engage donors of all levels with the opportunity to participate in raffles, games, voting, and instant purchases.

- **For Hybrid Events:** Consider having different types of games or raffles for in-person vs at-home guests.

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- Communicate final times that a guest may purchase chances to win via text message for increased sales and close items that are no longer available for purchase.

Determine how your team will capture Live Auction winners and Donations.

- For In-person Fundraisers: Live Auctions and Donations can be captured traditionally with bid paddles or donations can be placed electronically.
- A Live Auction can be conducted in a manner which includes virtual guests. Consider having your live items open for bidding for a short (5-7min) timeframe, allowing guests to bid during this small window of opportunity. This will still provide the excitement the bidders are looking for, and engagement can be tracked using the Backstage or Live Activity pages.

Close your auction according to the expectations you've set with guests.

- Plan to manually close and reconcile the auction to account for any changes in program/timing or set an auto-close for fundraisers with a firm end time. Auto-close is typically used for online fundraisers with no live component, as this both closes and reconciles the auction.
- Send a warning text up to 30 minutes prior to alert donors of their final opportunity to bid and specify the auction closing time to avoid any confusion.

Efficiently checkout guests

- Enable Self Checkout in your global settings for guests to easily checkout on their phone with the credit card on file.
- Ensure credit card processing fees have been set to the desired setting. Optional for Purchaser is our recommended setting, however the fees can also be set to Paid by Purchaser or Paid by Organization. It's important to discuss with your team how to set the fees, since this does impact the user experience.
- Supporters with a card on file may not realize they need to complete the checkout process and instead assume that their card will be automatically charged at the conclusion of the fundraiser. You can quickly settle remaining balances using the Bulk Run Credit Cards feature found in the Dashboard > Payments section. Simply set a max threshold for the dollar amounts you wish to process.

If you need additional help integrating GiveSmart into your fundraising plan, check out GiveSmart's service offerings at www.givesmart.com/plans.