

10:01:39 Well, i'm gonna go ahead and i'm gonna hit record. we'll get that Going.
10:01:48 Perfect, Alright, well, awesome. Well, hello, everyone, Thank you for showing up for our annual Give local platform walkthrough also.
10:01:56 Thank you for registering for give local, especially this early, which is always nice.
10:02:01 My name is Melissa I'm the programs Coordinator.
10:02:05 Here at the community foundation of South Puget sound my pronouns are they them?
10:02:09 And we're just gonna call you you know wednesday quick. It's like an hour we're just gonna kind of guide you through how to use the platform itself.
10:02:18 We're just gonna kind of walk through the different stages of it and hopefully answer any questions that you might have in regards to how to use, how to utilize the platform.
10:02:28 How to just get the basics done, whichever you may need.
10:02:33 And i'm gonna go ahead and share my screen and show you this lovely
10:02:44 Powerpoint that I have which we won't spend too much time in here, and you will get this powerpoint at the end.
10:02:50 After the session is done. so that way you can revert back because it has some like, you know, screenshots and some extra, you know.
10:02:58 Kind of tips and information, so you can revert, you know you can refer back to it.
10:03:04 This recording will also be posted as well on the Sps gifts org website under the nonprofit toolkit.
10:03:13 So before we go. so let's go ahead and do that oh, right so hopefully, everyone can see my screen.
10:03:26 We can see a Powerpoint going. so lovely.
10:03:32 Just give local And again, as a reminder, the session is being recorded for training purposes.
10:03:38 So that way. Folks who couldn't make it today or folks who maybe register for give local a little bit later can still come back and view this.
10:03:46 You also can come back and view it if you're like I could have sworn, unless I said something about this, and I can't remember now.
10:03:54 So this is a good tool for that we're gonna go ahead and just ask that everyone stays muted until we stop to ask for questions that we numerous spots.
10:04:03 You can also always put stuff in the chat and we'll check the chat at those stopping points as well.
10:04:11 So before we get too far into it so it's not just like all super boring.
10:04:16 I just wanna go ahead and just let everyone know a little bit about me.
10:04:20 So again my name is Melissa Roscoe.
10:04:22 I use they them pronouns you'll also see at the top in parentheses.
10:04:26 There's an mx and that is pronounced mix like you're mixing a bowl of cookie dough just a little bit history about like me in my like professional life.
10:04:40 Is that I used to work. My first job was I worked at Fred Myers here in Tumwater I worked there for about 8 years, first as a like Kurt Pusher, and then as a cashier for
10:04:52 several more years I quit at the end of 2,014 to go back to school, where I first went to Sbscc and got my associates in business, and then I proceeded to transfer over to St.
10:05:05 Martin's and the picture with once the saint always a saint shirt on which I still have holding like a little funny award that I got I think that's the one

that I got for psychology

10:05:19 because I majored in psychology as well as business administration with a focus on marketing.

10:05:25 I also minor in gender and identity studies.

10:05:32 So I kept busy and but through that through my time at St.

10:05:34 Martin's I also have the pleasure of getting to meet with Mindy and working with her on give local, particularly with the time like building timelines and kind of like schedule that folks can use to help compare themselves for

10:05:51 give local, which is still located in our Give local toolkit.

10:05:55 If you ever want to use it. and from there is where Mindy, like invited me to apply for a part-time job they had here.

10:06:03 And then that turned into a full-time job after I graduated from St.

10:06:06 Martin's still here about 3 years later. so it's been very exciting journey on a non work related, and a professional level.

10:06:16 I am a huge nerd, and I love board games and video games, and like fantasy novels.

10:06:23 And so I have a picture with David Tenant and several and a couple of my friends at Emerald City Comic-con.

10:06:31 I do believe this one was back in 2018 it could be wrong.

10:06:38 But around that time, and i'm just going to Comic-con, because conventions are really fun where you get to have a whole bunch of people who are in very similar mindsets, as you this other picture I with I

10:06:48 love sausage to you was taken in Berlin back in 2019, when I went with some St.

10:06:55 Martin's friends for a short 2 week study abroad tour over in Berlin and Vienna, and it was a lot of fun.

10:07:04 I really love getting to travel, getting to see what else there is to offer.

10:07:09 That trip was actually my first time out of the country, I think around the Us.

10:07:13 Fair bit. but that was you know getting to go somewhere else like entirely new, very, very different, like culture was astounding, and I'm actually going to be doing it again soon, which is why we're doing this session so early and we're only

10:07:27 doing the one session because i'm gonna be gone out of the country.

10:07:31 I'm going back to Europe for a few weeks so but besides that also, and then the last picture is back when again I work.

10:07:39 When I worked at Fred Myers they started working at Seattle.

10:07:45 Capital capital city pride, and we got to have like a float in the parade. and so I participated in that for a few years. as I do identify within the Lgbtq community.

10:07:58 Very open about it, and I just I love getting to be with people who again our out, and they even more people who aren't out and just getting to be themselves and getting to explore all of that and I love getting to talk to

10:08:13 people in regards to that, as well, but enough about me we're gonna go ahead and just do a quick overview of our agenda today.

10:08:25 So we're just gonna talk a little bit about some terminology, because the platform does have some interesting verbiage, but that we are on our end unable to change because it's just for everyone and we just kind of work with

10:08:38 it. we're gonna also go with what one of the terminology.

10:08:43 Things is your story, which is also known as your like campaign.

10:08:48 So we're gonna talk about your story. setup all the different breakdowns of that we're gonna talk about your team, which is everyone who has access to edits.

10:08:56 Your story. we're gonna talk about transactions and like all that donor information.

10:09:02 We're just gonna kind of go through some of the optional features that are here that you can use to help kind of up your game to better promote your story with also with the tools that this platform provides you can also always

10:09:16 feel free to kind of utilize any of those features like outside of this platform as well.

10:09:21 If you already have some stuff established, such as social media accounts, and just directing people over to your social media account.

10:09:31 So the quick terminology had cap is the first one is that what's called what give local campaign is called within this platform is called an initiative.

10:09:43 So when I ask you, or if you happen to reach out to the platform, helped desk.

10:09:50 If they ask you what initiative are you part of you're gonna be referring to give local 2022.

10:09:58 Your story is your organization's campaign so that includes all of the different features.

10:10:04 That is just the broad overview of what your campaign is.

10:10:07 The story name in this case is the name of your organization there's going to be space later on.

10:10:14 That you will be able to kind of put like what you're fundraising for and I do believe that's the story title so it's a weird he wants but we'll talk about that a little bit

10:10:25 more later. Storyteller is essentially anybody who has access to make changes within your plot within your story, and the team is just a group of storytellers. A specific storyteller that has payment manager status

10:10:44 is someone who will have access to view transactions so you'll be able to view the donor list.

10:10:50 You'll be able to print out a like excel spreadsheet of it all that kind of stuff if you don't have payment.

10:10:59 If somebody doesn't have payment manager status then they will not be able to view that information, and so.

10:11:09 But the main person who like essentially the owner the first person who set up your account. We'll have access to be able to turn that on for anyone else that you invite into as being a storyteller, and I will also be

10:11:20 able to. If you ever have problems with it, I can do it at my end as well.

10:11:24 So i'm gonna stop the powerpoint and i'm gonna switch over into the live platform itself.

10:11:35 I don't know

10:11:40 And go back in here

10:11:51 The share screen again. Oh, right perfect. So now this is once you have signed into the platform which is going to be my dot community funded dot com.

10:12:09 You can also access this by going to let's just start a new tab, and give

10:12:18 When you are on the live, give local site, which is Sps gives org.

10:12:24 There is a spot on the top in the header that says nonprofit login, which will take you to that, my daughter community fundedcom.

10:12:34 So you can access it either way, by either remembering it book marking it, or just going to sps gives their way.

10:12:41 However, it's suits you best. but when you do login. This is gonna be the first thing you see is your dashboard, which is not nearly as interesting as it is Once we actually start give local.

10:12:54 Because this is to keep you updated on how many like where the donations are coming from.

10:12:58 When they came in that kind of stuff so it's pretty blank at the beginning.

10:13:04 But the first place to start is always the setup and your setup is where the bulk of your editing is going to be happening, and this is where you're going to spend the most of your time especially prior to the start of

10:13:16 give global So, thinking of that we're just gonna kind of go through it, And the first part is here there's multiple tabs which our we'll kind of go through each one, and they have multiple kind of sections within

10:13:33 them. But starting with just like the details this is going to be where you're like putting your story name.

10:13:43 So this is the name of your organization is where that story name comes into play.

10:13:45 You will be able to put in a little image, and then down here you can type in a little summary.

10:13:53 Like a snapshot of your organization, we'll go in here, and this little square is showing you essentially everything that you're like typing in here in these spaces, and like images you upload and this rectangle

10:14:09 is what goes on. The main Sps gives website. Once we go live.

10:14:17 Once to go live there will be a space that just says nonprofits, and then it will have a listing of all of you who are participating, and that's where Hope inv people can you know find your work, Maybe donate

10:14:31 maybe share it all that kind of stuff, whatever they can do to help support you.

10:14:39 And once in an important thing to note is every time you make a change on a page, there's a little button up here in the top right? that says, save changes if it is like this oranges red color.

10:14:51 It means you've made changes that need to be saved If you try to kind of veer away from this from the page you just edited without hitting save changes. a bonus.

10:15:04 The platform will say, are you sure so they give you a little bit of wiggle Room to make sure that we don't.

10:15:11 We don't forget to save cause then you can just cancel hit save changes, and once it goes back to being white.

10:15:20 Then that means there's no new changes that need to be saved, and nothing's going to come up when you switch to a new location, and the next part is going to be your impact and when it loads So so

10:15:40 your impact is this is just gonna be when somebody has checked out and they've made their purchase or sorry they've made their donation.

10:15:52 They will, They'll be on the screen a little check out summary. That shows them who they donated to a reminder that you know, an email from the Community Foundation is going to be coming with their receipt information all their tax information that they

10:16:07 may need. but this is where you can put in a little.

10:16:13 Thank you, Snippet. that is kind of an quick they see it right away.

10:16:18 It doesn't take up email space for them and it's just a nice little thank you.

10:16:23 You can also obviously feel free to definitely send people, and we encourage it to send people. Thank you.

10:16:28 More personalized. Thank you. Letters emails after give, local has concluded or during it.

10:16:34 If you if you have the time this, is just always a good one, it's always just nice to have that little bit of a no room reminder why you're doing you know why you were giving a gift to this specific organization this is also

10:16:48 where you will go ahead and to set up your goals so you can have goals that are dollar values.

10:16:59 You can have goals that are donor participations.

10:17:04 And you can also just choose not to have a goal that you're just like we're just here to have a good time.

10:17:09 Like, Why not? And so you always want to keep it at standard, because it gets complicated when we do calculated so kind of ignore the goal type.

10:17:19 One calculated gets messy, but you can put in a dollar value.

10:17:24 You can put it in, you know, literally any amount so if you think you know, \$1,000 seems reasonable, or maybe it's \$10,000.

10:17:33 It is important to note that it's always good to set a goal that is both ideal for your organization in what your needs, like your current needs are that you're fundraising for but also realistic for how much effort and time you're going to be able to

10:17:53 put into promoting this, and possibly achieving the goal because, like sometimes when you set the goal to high donors will come in, they'll see that they're like, Oh, my God, This per you know, like this organization is trying to raise 100

10:18:04 \$1,000, and they've raised \$2,000 so far like what is my \$5 gonna make a difference on and we don't want them to feel that way.

10:18:12 We want them to know that like it doesn't matter how much they donate it doesn't matter if they only share your story, or if they tell a friend about it like it Still, matters.

10:18:21 And it makes a difference, and so we don't wanna overwhelm them.

10:18:26 But we also want you to make sure that it's something that's attainable for you, and on average in the past.

10:18:31 This is our 6 year in the past 5 years. holding give local The average amount raised is roughly about \$4,500.

10:18:43 And so we've had some who've gone really above and beyond.

10:18:47 We've had some who have managed to get you know like over like \$30,000 raise.

10:18:52 We've had other ones who you know had a hard time and they only managed to get like a \$100.

10:18:58 What is still helps. get the word out. It still helps with letting people know what your organization does, what it stands for. and we're always happy to chat more about with different ways to kind of promote.

10:19:13 If your goal is a dollar value. Another thing to note is that there is again participation goal.

10:19:20 So that is, you can either set that by the number of donors, or you can do it by the total number of gifts.

10:19:27 And this makes a difference. This is a very minor difference where the donors is.

10:19:34 If it's a individual person but maybe they also included their spouse in

the gift.

10:19:40 This that will then count them as 2 donors having participated versus a gift.

10:19:44 It doesn't matter if a spouse. is included if it's was a company donation.

10:19:51 It's just each you know essentially one transaction equals one gift.

10:19:54 No, it'll have slightly different numbers on that end but you can set a goal, either.

10:20:01 Monetary. you can set it by participation. You can set both if you want to.

10:20:06 So that way, you know. like say you're like my goal is 10,000.

10:20:10 But I want, you know, 1,000 donors if i'm not great at math.

10:20:17 But I think that's basically a 1,000 people donating a \$100.

10:20:21 So that's always one marketing tactic is just to be like, hey?

10:20:24 This is this is what we need. You want to help us.

10:20:29 And so that is just the impact part. looking at a new feature that was added this year is called associated initiatives, and this is something that is still a little wonky.

10:20:45 So I i'm not certain that people should do it quite yet. But you're right to. if you want to kind of help work out some of the kinks with me and the platform.

10:20:59 But this is essentially a new space in which people who have previously participated in give local would be able to pull, to reassign a previous story and move it over into this initiative.

10:21:15 So if you participated last year in 2,021, you would be able to.

10:21:19 You or myself depending on if you're having troubles with it or not, would essentially be able to just make a duplicate of your last.

10:21:31 Your story and move it into this year, and it would start you with a fresh like ground \$0.

10:21:36 No donors but it keeps your all you're about information your impact information your fundraising page information which will get you shortly that way.

10:21:51 It's like you're not entirely starting from scratch by again it was reminder.

10:21:56 This is really brand new like they just implemented this I do believe at the beginning of this month.

10:22:03 So there's still a few pinks to be worked out. but you are more than welcome to use it in this manner in which you will essentially just be able to you'll go into your old initiative.

10:22:16 You go into your old story, go to the associated initiatives, and then you can add an association, and you would click.

10:22:26 Give local 2022 to kind of move it over.

10:22:32 And so then the next stage is we're gonna talk about a little bit about tags and categories.

10:22:37 So these are just ways to help people find your organization and similar to like hashtags and stuff like that where it's it kind of like triggers.

10:22:48 A search feature. When you are you like, search, drop a certain keyword, and then everyone who has that keyword attached to their story will kind of pop up for the donor in the search bar.

10:23:01 These categories are the focus areas that we had.

10:23:05 You all select. at the beginning you can feel free because it is limited, and I know a lot of organizations do more than just one thing like education and youth in arts and culture overlap over time.

10:23:19 Unfortunately, with the folks area kind of stuff, and like the primary

focus area, it only gives us the option to give.

10:23:26 You could just choose one. But once you have set up your once you've started your campaign in your story. you can go in here, and you can add additional categories that you're organisation fits under But we wanna make sure that you are 10:23:41 only picking ones that are relevant to your organization and in a meaningful way.

10:23:49 So if your organization, you know. Oh, well, this one time we held a workshop that talk about healthy eating habits.

10:24:02 But we had that like 5 years ago, and for the most part we work on teaching youth.

10:24:08 How to do certain like arts like maybe teaching folks how to like weld, or, you know, sculpting something like that.

10:24:19 We recommend that you don't add health and wellness because that was like a one-off thing.

10:24:23 It's not something that you do on like on a regular basis.

10:24:27 So this Yeah. So these the categories are just that big overview.

10:24:31 What does your organization do all the time? And then, when you come to tags, those are again.

10:24:36 Those are the hashtags that you can kind of manually add.

10:24:39 You can add as many as you want but a good start is you just go to manage Tag selections, and there's already gonna be a whole bunch of pre-made ones that you can choose from.

10:24:51 And you would just go ahead and you could click in and just start adding stuff that apply to your organization.

10:24:58 That would be a key word that you think somebody would look for when searching up your organization.

10:25:04 And once you do that, you'll hit save in this shows you all the different tags that your organization is associated with.

10:25:10 So in some uses the search feature. your name will talk last little bit, not super exciting, but it's here.

10:25:20 This is just the owner of the story, which essentially is just.

10:25:26 Whoever started. whoever's admitted the registration form you can change this if you search, and this is just kind of something that we use as a primary contact.

10:25:37 So it's not anything that info like it doesn't affect your actual like story.

10:25:43 It doesn't affect, givelocal itself this is purely for like on our end.

10:25:48 If we need to get a hold of you, who is the main person that we should be getting a hold of?

10:25:53 And what is their information? So no, okay, that is it for the details, Tab.

10:26:03 Do we have any questions before moving on where's my questions page questions. You can feel free to come off, mute, or you can post up in the little chat box, whichever floats your boat.

10:26:21 Don't give it a second yeah change some water

10:26:35 I'm gonna assume that we don't have questions at the moment, but obviously feel free to write them down and we can talk about them later, too, or just write them in the chat as you think of them.

10:26:45 But we were we're gonna go ahead and move on and we're gonna go to the fundraising page, which is the fun part.

10:26:53 So there is again asking me if I wanted to save those changes, and I do not.

10:26:59 This is just a test campaign. so it's man right Oh, i'm glad it's definitely helping you then.

10:27:07 Cause. Yeah, it's a it's a interesting platform to kind of hop into without prior knowledge, and you just like fumbling around like you can make it work if you've never been in the platform before.

10:27:19 You didn't come to a walkthrough, or anything and so you're just going in like completely naive. you could you could fumble your way into finishing everything and But i'm also always here that you can give me a call

10:27:32 you can send me an email, always happy to help as well.

10:27:35 So looking at the fundraising page the first thing that I always like to show people, and that is very important is that up here There's this little. you are L Code right here.

10:27:52 And this is the direct link to you know and so this is where you're going to come in and you're going to copy this and send it out.

10:28:03 Put attach it to your emails That, you know. Put it in social media posts.

10:28:07 Everything like that, I will say. Unfortunately, there's not a way to shorten the Url within this platform.

10:28:16 But there are out. there are external third party apps that allow you to do it like, I do believe, like bits.

10:28:23 Dot Ly is one of them, and it's just a simple matter of yet.

10:28:29 Bring in the original link, and then you can set up a smaller, more palatable kind of link to send people.

10:28:38 Or if you have the ability to just input hyperlinks, then it doesn't matter how large the url is, cause it's just gonna be whatever text you put in as the hyperlink you can also once

10:28:51 we have gone. Lot once you're organization once your story has been published and set up.

10:29:00 You will also be able to kind of use this little tiny weird little box with an arrow pointing out, Not that it's really easy to tell that that's what that is.

10:29:08 But if you click this part it'll give you a more full screen of what your campaign looks like from a donor point of view once we go live so it's like you should picture here's sharing your fundraising

10:29:24 goals all that kind of stuff. but again it's It does have to wait until after the story has been submitted for review, and has been published, which is a little bit of an inconvenience.

10:29:42 I know. but you do have. This is also a small shot.

10:29:48 This is just a smaller version of what I was just showing you so you'll be able to see in real time.

10:29:52 As you are making edits. How it's looking and so going through, how to make those edits is everything to make edits on your story page.

10:30:06 Your fundraising page. Everything is over here on this right hand side.

10:30:11 So all on the same page, definitely keeps things easy, and the first part this is so.

10:30:17 The page title. That is what I was talking about earlier when we were referring to your story Name, which is under details.

10:30:27 Story name needs to be the name of your organization, but on the fundraising page your page title can be whatever you want it to be, usually something in relation to why you are participating in. give.

10:30:39 Local. What do you mean? What do you hear for you, you know, trying to find, you know.

10:30:43 Are you looking to spread the word about what your organization does?

10:30:47 Are you trying to raise funds to get a new van for your organization to transport stuff wherever it may be?

10:30:55 It's just gonna kind of pop up as we're right here where it says, test story that is where that title is gonna go.

10:31:04 So it's gonna be the first big boom thing that everyone sees when they come on to your story. page.

10:31:13 So there is also the ability to kind of play around with some of these buttons.

10:31:20 This is pledge We don't actually have the pledges active, that is, for like year round platform use

10:31:32 So don't don't worry. about that one it should be turned off on our Give local 22 2022 initiative.

10:31:42 But this was just a test campaign that I built so forgot to take it off.

10:31:47 But you'll also be able to you know have like the homepage of Sps Gibbs up Org.

10:31:54 There's also a like donate now, button which you can change the verbiage if you want to to make it.

10:32:00 Say you know, feed a cat today, or something like whatever maybe catch people's attention.

10:32:08 Besides donate. You still want to make it kind of clear, though, that this is where they go to add your to add a donation or gift to their cart for your organization.

10:32:19 So there should be something about like Donate give whatnot there's also the same with share that is just an option that pops up where it will make a J like just this auto-generated link to your story.

10:32:36 And then it'll have you know, like hey? I was supporting this, you know organization. and you can come do so, too, by following this link, and it just helps people they sign in to like their Facebook or their Twitter.

10:32:52 And then it'll you know post it for them so that way it's just a quick, easy additional the way to they can help your organization.

10:33:01 We also Have So there's an image you Do on, Unfortunately, only have the one image that can be put in this like large mainframe space.

10:33:11 You will be able to add other images like into like this body of text.

10:33:17 That is also you plenty of space for you to be able to put in like an infinite number of images.

10:33:23 But also note the more images you put in the slower the page load.

10:33:27 So you got a balance now, a little bit and you'll just be able to go in.

10:33:32 You can update, and you will just put it in an image.

10:33:38 I just have like a 1 billion animal ones, cause I like animals.

10:33:41 So we just like crop and use, and then you have a new image.

10:33:47 And there's also the ability that you can upload hey?

10:33:53 You can also integrate a single Youtube You are L for a video that you organization may have posted at some point or another.

10:34:03 And essentially, when you have one in there it just pops up this little play overlay on this image And so that way people can click it, and then they will be rerouted to get to see that Youtube video, I don't

10:34:17 know what that Youtube. video is. So i'm not gonna enter that probably

something with animals.

10:34:22 But i'm not promising anything so this is again.

10:34:30 Then, this is where you would choose. What fundraising like your goals that we were talking about earlier, that you set up.

10:34:36 This is where you can decide how much of it is shown to the public.

10:34:40 You can make it so folks are. when it comes to the dollar value you can make it so.

10:34:46 It shows the total versus the goal. Show just the total raised.

10:34:52 Show what the goal is. or you can just like, not show it at all.

10:34:57 And the same goes with the number of participants in gifts.

10:35:01 There's also the Progress bar which is show which is not set up right now, because there's not a timeframe set for this.

10:35:10 Initiative, but it would also show how much time is left to give, how much time is left in.

10:35:18 Give local. Now the big piece, the coup de gras it's going to be your body contents, and that is this big space right here.

10:35:29 So right now it's just a bunch of text and you can use this space generally like this is kind of some of the helpful stuff that it that the platform recommends.

10:35:41 But also we recommend, because that is what we usually see as being successful is using the space to be a text in visuals.

10:35:50 Kind of putting in. why gifts can matter, no matter what size they are, how the gifts will be used within your organization.

10:35:58 Is it gonna go help to, you know, Stay in newer cats?

10:36:02 Is it going to buy art supplies for youth whatever it may be? it's nice to just kind of give a quick, you know.

10:36:11 Snapshot of like this is how the funds will be used.

10:36:12 There's also, if you have specific goals so maybe you're raising funds like we're saying earlier for a new van to go and deliver food to elders in their home.

10:36:24 So they don't have to go out and rip getting sick or maybe they're physically just unable to do so.

10:36:30 So it's good to kind of like this is you can specify like what you are aiming for with this.

10:36:38 So then there's all the you wanna make sure to put in, in, usually like bold or a different color, maybe make like a little image.

10:36:47 But something that just says like, Hey, this is what we are asking of you as a viewer, as a donor, as a community member.

10:36:58 We're asking that you share this campaign or that you donate the \$5 today.

10:37:05 Maybe you're asking them you are like hey? we also need like additional clothing, because we have a clothing bank.

10:37:14 Stop by our place and drop off some spare clothes, like whatever your call to action may want to be.

10:37:20 Whatever you want to encourage these the various viewers and community members who come by.

10:37:24 What is it that you are asking them to do? And so you can make all you can do all of that by going into open text.

10:37:34 Editor, and you can time whatever you want within reason.

10:37:46 Because again we will. there is a process in which we do like an approval before we go.

10:37:52 Live where the Community Foundation staff is going to kind of go through, and just sure that there's nothing like nothing hateful nothing, you know.

10:38:03 Obviously nothing that goes against our like discrimination policy and everything like that.

10:38:10 We don't want anyone doing that we've never had an issue with it, not on wood.

10:38:14 Hopefully. it stays that way because i'll be just too lovely of people to do that.

10:38:21 So I have faith in all of you and so you yeah you'll be able to type in stuff.

10:38:27 There are a few different features for playing with like the size of the text.

10:38:30 There's the generic bold yeah you also will be able to highlight, and this is the this is the formatting options that they have for sizing.

10:38:47 And it's a little it's very limiting and so but it's it starts with there's h one h, 2, and h 3, and essentially it goes from the largest size font to the smallest and it, can kind of you

10:39:06 can play around with it a little bit. Choose which ones you like, maybe use different ones for different points.

10:39:12 However, you want to do that. there's ability to put in like some bullet points, some numbers play with like the paragraphing like where the placement starting point is at your you know, in you know, like the invents and

10:39:28 all that kind of stuff you can also but in images again let's put in.

10:39:36 I don't know I think these are capabilities there's, some capabilities, and we can go bo the one thing, though, when it comes to imaging which there will be in the toolkit in the nonprofit

10:39:49 toolkit on Sps gives. There is a size size, imaging chart.

10:39:55 That kind of helps you navigate like how big the images will be, because once you, when you put them into this space when you click this, it's going to put it in as a kind of like one size fits all So if you

10:40:08 have something that's like really big like this it's gonna be really big on the screen, too, and it's gonna be obsessively what like just obscenely large.

10:40:22 And there is, unfortunately, they are working on it but it hasn't happened, implemented yet to where it's you cannot edit the image size, since within the platform itself.

10:40:33 At this time. So kind of be wary of that there's also third party.

10:40:41 Again. Third party websites that can help you shrink images and make it to be more fitting.

10:40:48 Feel free to reach out to me if you need some ideas on that.

10:40:50 The last piece that I want to show you about the body content, and that is super helpful for folks to know, especially if you have other links that you want to direct community members too.

10:41:05 Is, you can put in hyperlinks on any text within the body content, and that is simply done by highlighting the text that you want hyperlinks, and then you will find the little paper.

10:41:18 Clip looking icon click it, you will enter in you know whatever the Url is, give Dot Org, and then you have to make sure to hit the enter button, or I think in like when it comes to like.

10:41:32 Mac products. I think it's return. they'll hit enter, and then it turns it blue, and it says and that confirms that you have a hyperlink.

10:41:43 Now, and when people are on your platform, when they're on your story, if you want to direct them somewhere else, to you know, like hey?

10:41:49 See what clothing items that we need or sign up to volunteer.

10:41:54 Here is a hyperlink that you can put in and have people easily click and go elsewhere.

10:42:00 We're just gonna do save and there we go and again. Always remember to save very important piece to do it does not auto save.

10:42:11 So So after that, I do yeah so that's the main thing.

10:42:19 The everything else under here is these are all optional features, and they all have their uses.

10:42:24 Some can be really fun. Other ones are kind of like yeah they don't really do a whole lot with within the confines of give local, and you can delete stuff.

10:42:34 You can by hitting like the little trash can it'll ask for sure I can confirm or deny it.

10:42:43 If you accidentally delete something that's actually. okay, because you can just go to add content, zone, and you can re-ad it.

10:42:53 There is all of the different options or back in here.

10:42:59 So you have community which community is showing where people are donating from using zip codes.

10:43:06 There's matches. So if you have match funds that are set up prior to the start of give local you can have a listing of all those shown.

10:43:18 You can just have so rich text sections literally it's just another body of contents space.

10:43:23 So you can, just if you want to type in some other information.

10:43:27 Maybe a little bit more details about a specific program that your organization offers.

10:43:32 Maybe something a little bit more detailed about that. Why, you need that new van for transportation, whatever it may be, you can just make.

10:43:42 You can add some of these, and you can put more content in here.

10:43:48 And embedded media is going to be some additional like links.

10:43:54 It doesn't work with everything but it works with certain social media, so it can.

10:44:00 Go ahead and add one and kind of show you so it'll you'll have you know like hey?

10:44:06 This is a little bit about what this is and then we're gonna add like a.

10:44:12 So a third party code is often in regards. it's going to be the link to your social media page, or if you have hey, Mike, I think it works. I can't remember I know, last year it works I do believe with

10:44:29 like Youtube and Institute. I don't know if they've gotten it working with Tiktok.

10:44:34 Yet. it's just another way to kind of Add more details about your organization usually like utilizing platforms and sources that you already have built.

10:44:51 Looking at other content Zone types. You have funds.

10:44:56 Ignore that one. We only have the one fund so don't worry about that one story updates.

10:45:01 We'll talk a little bit more about updates later. But a story update this just kind of shows you can make like a little blog post essentially within your story that can you know.

10:45:11 Keep people updated whether It's updated on something exciting that happened with your organization or you hit a huge like fundraising milestone during this campaign.

10:45:21 And this will just kind of help set that up heroes is again.

10:45:24 We'll kind of talk about that, a little bit later is just It's a space where it shows donors names, and or you can have it pre set up to like maybe it's thinking sponsors throughout the year maybe

10:45:40 other. Maybe you got grants from other foundations or business local businesses, and you want to just highlight them.

10:45:50 You can use the hero space and just manually type in their names.

10:45:53 The last one is the champions leader board so that's just gonna show if you do get champion setup, which we'll talk about.

10:46:00 Don't worry if you get champions set up.

10:46:06 This will just kind of show. whatever you are setting up as the goal for like fundraising or the number of donors that their link brings in whatever it is. It'll just have like a little leader board showing how everyone's doing But it

10:46:20 will leaderboard only will show folks who have managed to get who have received a donation or have earned the donation on your behalf.

10:46:31 So if you have champion setup, so you have 10 champions set up, but only 2 of them have gotten somebody to click their link and then make a donation.

10:46:39 Only those 2 will show up on the leader board. So just a quick heads up on that one. Yeah.

10:46:46 And then, whatever sections you decide to have you will it'll pop up over here. you can arrange them by clicking these little lines.

10:46:55 You just hold it and then move it and it will switch where it goes.

10:47:01 Obviously there's no heroes right now so it doesn't actually show you.

10:47:04 So let's show you something that actually can be moved So yeah.

10:47:10 So I just rearranged it. So the story updates are now up here.

10:47:13 The community. Information is down here. and to make edits to these you will open up the little dropdown button and change the title to happenings.

10:47:30 You can put a little sub header there's just a few little basic icons that are just for extra flavor.

10:47:37 You can choose how many stories are showing. So all these different kind of options are going to be there available for each one of these different sections.

10:47:46 So you have the heroes. you got the community the community wants fun, too, that you can do it based on a world map, or you could do like just the Us.

10:48:01 And it's gonna kind of show you just darker colors based on where donors are coming from.

10:48:07 The world map is gonna have like, just like little red dots all over the place.

10:48:14 But it is fun when you get to see like if you have somebody who is.

10:48:18 Maybe they're over in like Japan. or something at the time and they make a donation like It's fun to have this like random little red ping like over there in Japan.

10:48:28 Well, everyone else has much of red pings over here in the Us.

10:48:31 In Washington like you. just have this one over here and So there's just all these various options that you can do and feel free to play around with them.

10:48:43 You know, delete stuff bad stuff, you know. Do whatever works best for you.

10:48:53 And if you ever have any questions about how to set something up, or maybe how to utilize it, you know, like, Okay, Well, what could I actually use this for?

10:49:01 Just always feel free to reach out to me anytime.

10:49:06 So I think i'll just because this next few sections are pretty short.

10:49:12 We're gonna go through those before we pause for another question break

going back up here to the top of all these different tabs is the first one.

10:49:22 Yes, I wanna leave. I is payments honestly it's because of the way we run.

10:49:32 Give local all funds have to come through the community foundation So you don't need to do anything here with payments like you're just It's just there and there's no way for me to hide it from you even

10:49:44 though it's a you're just not going to use it so.

10:49:49 But so that's an easy one. You can ignore it the other one is the Thank you email.

10:49:53 So this is just on top of like we have it set up to where an automatic email goes out with a receipt and tax information for the donor that specifically says it's from the community foundation.

10:50:07 But it's very generic thanks for donating here's your info. this is where if you want to set up an automatic, email.

10:50:16 You can put one in here, you would make sure to enable it.

10:50:19 Hi! and then an email subject line who it's from replying address.

10:50:26 You can put a little image you can include the salutations.

10:50:29 An important notes in that we still are it's low unfortunately on the the developers list of things to do.

10:50:40 But at this time, if you choose, to use the salutation, and you have it's free set to auto fill like a first name and a last name, or, just the first name, or just the last.

10:50:53 Name. This will only go towards the donors name, who is like basically the primary donor.

10:51:02 So the person whose name is on the checkout, if there is, if they also included their spouse.

10:51:10 This auto fill will not include a spouse's name and I will.

10:51:19 We want to and we understand it's important because you know you should be acknowledged for participating in this for us on the community foundation end.

10:51:29 We just opt out of having the auto fil name stuff and put like a just a generic.

10:51:37 You know, dear community member kind of thing. but you can choose to use it.

10:51:42 However, you wish. and then again you will be able to just type in your thank you.

10:51:51 Kind of note, maybe a little bit, talking a little bit more about how the funds are going to be used, or other ways that they can.

10:51:57 Other ways that the donor can support your organization outside of give local.

10:52:01 This is a good way to put that in there and it's just It's a quick thank you, and verification that.

10:52:08 Yes, we received your gift, and we deeply appreciated, and has all those same editing abilities as in the body content.

10:52:17 So you can add images, bold hyperlinks, all that kind of stuff.

10:52:24 The last one is going to be publishing, and this is irrelevant until the end.

10:52:32 So on. So all stories are to be submitted for review by the Community foundation by October fourteenth.

10:52:42 So the end of the day, some 1159 pm.

10:52:46 And then, after we've reviewed it and we've approved it, basically checking to make sure that like I said earlier, there's nothing super harmful, nothing that

is going against our you know, terms and conditions and then
10:53:04 it'll be approved during that time you won't be able to edit anything Once
you've submitted it for review.
10:53:10 But after We've reviewed it we will it'll get approved, and then you'll be
able to come in, and you can publish it.
10:53:18 You can set your story card to display you can enable or disable
storyteller editing. if you just don't want anybody else to edit it anymore.
10:53:29 I mean it's up to you it's your province and the donations you will also
come in here, and you will just enable, especially once your story has been
reviewed, Just come in here and make everything turn green so click
10:53:45 enable enable. Well, maybe okay, Well, I guess can't enable it yet.
10:53:50 I think that's because the initiative is not set up for taking donations.
10:53:57 So there's nothing to donate to and it would go nowhere.
10:54:02 So that's probably and that's why it's not letting me enable right now. But
other than that yeah, after you've been approved. Then you'll come in and you can
just enable everything and then
10:54:11 you'll be ready to go once we go live the event schedule is something that
we do on our end.
10:54:19 So you don't have to worry about it and approval.
10:54:23 This is where you can come in to just see like kind of where the different
steps are.
10:54:28 So when you've submitted your re when you submitted your registration when
you submitted it, when you submitted your story per review, What was the outcome
where you approved?
10:54:39 Were you returned back to draft Why, was that sometimes i'll have like
There'll be little notes from like me or another staff member saying like this is
why we returned it to you and didn't approve your submission
10:54:49 can you go back in and change xyc it's usually not a whole lot of that.
10:54:56 But it's you know good to double check and so I think that is yeah, that's
pretty much it that's all those tabs.
10:55:05 So we'll go into the next maybe click click click we went through all
those.
10:55:11 So for some questions, maybe. so if you so we're asking if we submit it for
review early, is there a chance of you reviewing it before October fourteenth, or is
that the date you view them all regardless, of
10:55:28 submission date the answer to that is it's all gonna be submitted, or it's
all gonna be reviewed at on by October fourteenth.
10:55:40 Because, like I said kind of at the at the beginning of this.
10:55:44 I will be gone, and so it'll It'll be 10 I mean potentially.
10:55:54 My colleague, Mike, might be able to get through and start reading some
early.
10:55:56 You can, so you can feel free to submit it early, and then, like message.
10:56:02 It would be Mary lam is who's gonna be kind of taking over for the most
part, while i'm gone with give local stuff, and you can message her to see if
there's time if you can go in and maybe do a little
10:56:18 bit extra review. if not X. That was just I apologize for that slight
inconvenience.
10:56:28 I know we kind of did that like last year, and I really.
10:56:32 I loved getting to see. You know what folks are up to and getting to, you
know.

10:56:36 Help you work through some certain stuff. you know like if you were struggling with images. Then, what working you should use, and well, we will be able to do that to some small extent it won't be quite as thorough as it was last
10:56:52 year. and so I apologize for that, and I would also encourage that.
10:56:59 You can reach out to Mary while i'm gone, or reach out to me when I return, and additionally, if you maybe just have a colleague or a friend from another organization who maybe wants to you can go in and
10:57:19 you all can maybe like review each other's for a little bit you know.
10:57:23 Kind of show them it's like here? this is what I have going like? What do you think?
10:57:28 And then they can do the same for you Oh, it's an option So long.
10:57:40 Story summarized most. it's gonna be mostly all viewed on the fourteenth or later.
10:57:45 I don't wanna make any promises that I can't keep oh, perfect!
10:57:52 Is there any other questions? you can either come off mute or you can put them in the chat?
10:58:00 I'm gonna skill some water
10:58:13 Yeah, you need So looking So if we backtrack a little bit into the setup, This is the So the overall setup is when you first sign in you're gonna go into your dashboard this is where your you will load
10:58:30 up, and then you go into the setup section and there's just all these different.
10:58:39 Well when it lost load again. there's these different tabs that you will work through kind of usually like bit by bit.
10:58:44 Basically, starting with details, doing a fundraising page, ignore the payments email optional, and then publishing is relevant.
10:58:55 Once you need to submit your story after you've submitted your story for review.
10:59:01 And again, this recording will be sent out for folks to review later.
10:59:05 There's also I have a powerpoint that kind of does a little bit of overview of everything that I was talking about is all these different little steps, and little hints.
10:59:17 And so that will also be sent out to you all as well.
10:59:21 So you can kind of refer back to it. in regards to standard and calculated standard is a dollar value goal.
10:59:34 So it is just you set the goal for \$10,000 and you have a 100 you have a goal of a 100 donors or gifts, and it's just gonna straight up.
10:59:50 Say you've raised 5,000 out of 10,000 for your goal or you've raised one you've had 10 donors out of a 100.
11:00:00 But if you do calculated that is going to start playing with the like comparison between the goal you set like the monetary goal and the donor goal.
11:00:13 So if you are specifically being like no I want you know donors who I want a 100 donors donating a \$100 each, it's gonna calculate that.
11:00:24 And if somebody donates outside of it, it just makes everything look really messy.
11:00:29 So which is why we just encourage people to go with the standard.
11:00:38 But you can always feel free to try it out if you so choose.
11:00:43 I do believe you can change it as far as i'm aware you can change it at any point during give local 2.
11:00:49 So if you try it, and then you don't like it you can change it back.

11:00:54 Don't hold me to that, though I would need to double check on this one.
11:00:59 Of course. yeah, you're welcome and we're not done quite yet.
11:01:04 We do have a little bit of some additional stuff that we gotta go through, and I should probably go through it faster than I went through.
11:01:11 But this the setup page, is really the most important, which is why I spend the most time here.
11:01:16 The next thing that is important to make sure that we go through is gonna be creating your team.
11:01:24 So we're jumping around a little bit over here and this is it's going to first.
11:01:33 Usually the first team member is going to be the owner.
11:01:36 So the person who submitted the registration just shows their name.
11:01:40 What their role is. This is where you can turn on or turn off the payment manager status.
11:01:46 So their ability to access the transactions and donor information. And it shows you that what their email is
11:01:54 So the email is also their like username login information their status.
11:02:01 This shows whether or not they've actually finished up there accounts like, you know, if they've set up their login information password, this will show whether it's suspended pending active and you can also on the
11:02:24 flip side. There is the ability to kind of like Do a little bit of editing by clicking a team member's name, you know.
11:02:34 A little fun image of them and change the name change the login email type in a fake phone number but in a real phone number I recommend putting it a real one.
11:02:45 If you're going to put one but you can suspend them, reset them.
11:02:54 Address Most of this stuff, I mean is I mean you can I.
11:03:00 The most important thing really is just setting up is just making sure they have their username and everything set up.
11:03:06 And if this person wasn't suspended and if the campaign where, you know, if this was a live initiative, there would also be the option to like you could change the password right then in there, if you are that
11:03:22 person. So if you click into a team member and this is your name, it will give you the option to re like.
11:03:29 Change your password if you're the account owner or like myself, as admin there's an option that I can reset your password.
11:03:37 So it'll send you like an email that says hey?
11:03:39 Your password has been reset. click this to, you know.
11:03:41 Update your password. you can go ahead and do that.
11:03:47 And again, don't hold me 100% to it I forgot to double check it.
11:03:51 But i'm like 90% certain that in order to Do that you have to be owner of the story.
11:04:00 Take that with a greater salt if you can't Do it if you can't reset the password yourself.
11:04:05 Just let me know. I can do that. I have the magic abilities to do so.
11:04:10 And so yeah, you can have as many or as few team members as you wish.
11:04:17 You can add them just by clicking invite new team member. you put in an email, and it'll send them an invitation automatically pre filled in for your specific story for this specific initiative.
11:04:33 And a note similar to when you first registered your organization for give local the email that the automated email that comes out that sends out like a link

saying, Thank you for registering click here to review your submission
11:04:49 those links always expire within 48 h of being sent.
11:04:54 So if you're going to add a new team member make sure they know that this invitation is coming so that way they can click it.
11:05:01 They can click the link and get their stuff signed up.
11:05:04 Otherwise you can always just resend it it's not the end of the world.
11:05:08 It's not going to create multiple accounts if you use the same email.
11:05:10 It's not gonna make multiple It won't make multiple team member names for the same email.
11:05:17 It'll only just do one so that is definitely a bonus the next big thing that we that I wanna make sure we go over.
11:05:28 It's going to be transactions and There is quite a bit that you can do, and it keeps expanding every year, which is nice, but also sometimes a little overwhelming.
11:05:38 So you just kind of start off again there's like little tabs that can break things down into smaller sections, if you so choose.
11:05:48 And if you're utilizing any of those optional features but the big thing is just your all transaction.
11:05:56 This is just a broad overview of all donations and gifts that you have received during this initiative, and it just gives you like a snapshot summary that is updating in real time.
11:06:09 So you could be in this and then you like it says you've raised a \$150, and then you refresh the page.
11:06:14 And now suddenly it says that you brace like \$3,000.
11:06:18 Somebody was very generous. give a big gift so and it'll kind of give you like a quick breakdown.
11:06:27 Were they raised online offline. what's the averages all that kind of stuff, ignore the pledges again, and the reoccurring gifts.
11:06:35 Those 2 are a part of. If an initiative was lasting year round, This is not a year round.
11:06:43 Donation page, so those will just be blank all the time.
11:06:48 But you can also kind of filter stuff by dates. and you know, set certain dates in certain times, so it'll only show you the listing of donations that came in during that p during that time.
11:07:01 Frame. there is a lot of information that is available to you.
11:07:06 In regards to the donation overviews and it is really it's like I think it's almost every portion of the checkout page will be here for your viewing pleasure, and so you'll be
11:07:27 able to just kind of scroll over and like view the different pieces. so like the status has been, has the transaction gone through.
11:07:37 What's the denied for whatever reason was it cancelled, for whatever reason?
11:07:42 And you will be able to once. there is one in here you'll be able to kind of click it for a little bit more details on why it may be failed doesn't.
11:07:52 Always give that information. It depends on the method of donation.
11:07:57 So like sometimes, if it comes like visa versus mastercard.
11:08:02 Kind of stuff like depends on whether or not the third party wants to give us that information as well.
11:08:05 So you might get some, you know, like better insight versus other donations Won't give you like any insight at all.

11:08:13 It'll just be like nope it failed that's it. that's all you know.

11:08:17 But you know, gives you the date source type. How much they donated the name of the donor spouses name all that kind of stuff.

11:08:29 So there's lots of information and for me once you get like more than like couple of donations in here.

11:08:39 It just blows my mind and how to read it in this kind of tiny space, so you can go ahead and add any point during give local before, during after whatever flitch about you can hit this export button, and it will automatically

11:08:55 download a excel spreadsheet of all of your donations.

11:09:00 During this story, so you can get one every week. You could, you know, Excellent!

11:09:07 A new sheet every day, if you want to. You could just wait until the end of the campaign and get one

11:09:13 And for me it just makes it more palatable be able to read everything, and I can rearrange things as I want versus in here.

11:09:19 It's just this is the way it's laid out and that's it.

11:09:25 You can also you know again there's a little bit more filters that are down here.

11:09:31 So maybe you only want to view offline donations. This would, just in this auto space would only show offline donations.

11:09:39 Unfortunately, when you export with the filter on it does not adhere to the filters, it will still just export a spreadsheet with all of your donor information.

11:09:53 So good thing to note but yeah, so then there's more you can look for statuses that maybe you were looking for ones that failed. And you're like, hey?

11:10:00 I want to reach out to this person and be like, hey?

11:10:04 Your donation failed. Is there something I can do to help you?

11:10:07 Is there a way that I can better support you through this?

11:10:11 Do you need maybe some technical support if you want to?

11:10:18 We try to on our end as community foundation staff. We try to catch some of them.

11:10:27 And either let you know that there's been a failed transaction, or we let you know that we message somebody with a failed transaction.

11:10:36 If you don't hear, from, us saying one of those 2 things that it means that we have not reached out in any way, shape or form to this person.

11:10:46 And so you are more than welcome to do so and that and So then, again, you're going to these tabs, and it's gonna break it down by those certain sections.

11:10:56 If you have the optional rewards, setup matches, challenges, champions, all that kind of stuff.

11:11:02 Another new feature that they have this year that I almost forgot about, and I was about to leave this page.

11:11:09 Then I just remembered it there's something called shareable Urls which is new to both me and to the platform itself, so unsure on how well it works. And so, again.

11:11:27 If you use it, take it with a little bit of a grain of salt that we do have some time for kings to be worked out between now and the startup.

11:11:35 You have local, but essentially terrible Urls are, if you have a So you have a reoccurring donor who they have been supporting you during give local with a \$100 every year for the last 5 years, you can kind of speed

11:11:53 up there, check out process by building them a specialized Url which is not letting me do that right now.

11:12:06 Which is rude it did earlier and so but there will be, i'll make sure to put in some clips of what that looks like in the Powerpoint later. that gets sent out.

11:12:21 But essentially you'll be able to go. in There you will be able to fill out that donor information for them, you know, putting in that \$100 gift that they always do.

11:12:32 You know the name, you know, like your organization, all that kind of stuff.

11:12:35 Once you filled that out for them all you have to do you'll like you'll put in their contact information that you previously had on file, and then you will send an email to that person with that link, and say hey?

11:12:48 Thank you so much, for you know. always bring us during give local.

11:12:52 We wanted to help you out by saving you a few steps and then they'll click the link.

11:13:00 It will have all that information auto filled into their card, and the only thing they have to do is then put in their payment information, and they're done, and so you could do it that way.

11:13:13 You can also do it, maybe as an ask for folks that maybe with your broad email to all of your past donors and volunteers and stuff like that, you can build this Url link that is built in it says hey?

11:13:31 You know here's a generic you know link, that just automatically feels it for \$25, or whatever it may be, click this link to automatically add us into your cart, so you don't have to try and search

11:13:43 through all of the available organizations. but it is an option, and it is a little bit new.

11:13:53 So there's there's some things that we special learning curve on this one.

11:14:01 But because we are running a little low on time i'm gonna skip the next pause and we're just gonna go straight into some of these optional features, and one of the first optional features that the platform.

11:14:19 Offers is champions and champions are simply somebody who wants to help you promote your organization and promote your story.

11:14:29 So it's can be a volunteer it can be a board member.

11:14:34 It can be your spouse could be, if you have like.

11:14:37 Maybe right. A teenager at home is good with social media.

11:14:41 They could be a champion and help you out, because realistically, this is a very virtual feature.

11:14:47 As champions. in which you're sharing url kind of information.

11:14:53 So teenager is actually a pretty good option gonna be college student.

11:14:58 I don't know you can go in here you in invite your champion.

11:15:03 You send them an email, you can. if you want to. You can add a suggested fundraising goal participation goal.

11:15:11 Put in a little personalized message of why you would love for them to help champion and share your story.

11:15:16 And then you send it, and then they have the option to do that to either participate or not.

11:15:23 And again similar to like under the teams there'll be a status, whether it's pending active, suspended, whatever it may be.

11:15:34 This also gives a quick snapshot of If anyone has followed had gone through the champions link and then donated to your organization, it will show up a breakdown of that.

11:15:50 Here I show up the gifts. if they've if their storylink has been shared in you know by somebody else other than the champion themselves.

11:16:01 How much funds they've raised all that kind of stuff. It'll also have the ability to you'll have the ability to kind of view, and edit their profile a little bit so like putting in a name

11:16:15 picture the donor when they first, when the champion first gets their invitation, and they accept, they will have the ability to edit all of this, so they'll have the ability to if they wanna put a picture if they wanna you know

11:16:29 what their name is putting in their like a display name essentially

11:16:37 Oh, well, that was weird. I don't know why, it closed up on me didn't like me apparently.

11:16:42 But yeah, There's like a display name and their email address, setting up a password all that kind of stuff we'll get to go in there.

11:16:51 They'll have that when they first set up after that they have a little less access to changing that

11:16:58 But they'll have some access and when it comes to champions. When you do have somebody set up to be a champion, they can always access their personal profile by going to sps.

11:17:13 Gibbs org, and while nonprofits have this nonprofit login up here in the header in this title just a page title.

11:17:24 Essentially There is a one that says Login, and this login is specifically for champions only, so champions will be able to log into their profile and send out email invites from their profile by clicking here access

11:17:43 their specific url link to share out all that kind of stuff, and that is, you know, that's a nutshell that is, champions.

11:17:55 They're just a nice way to kind of help it gives people an alternative way to also help your organization if they don't, or if they don't want to, or if they don't have funds and instead, they wanna

11:18:08 you know. Just help spread the word. This is a great way to do that.

11:18:14 The next section is going to be updates I don't know if I have any take updates in here.

11:18:20 I guess I do have one it's not informative at all.

11:18:24 But let's go to one that actually has like some more useful updates.

11:18:33 So yeah. So here we go. so this one so updates is like I said earlier.

11:18:37 It's kind of like a space that you can use similar to like a blog post where you can really just post whatever's on your mind.

11:18:46 You can post something that maybe you just want viewers to know like about your organization.

11:18:51 What's going on with your organization what's new How is The campaign going?

11:18:58 How's the initiative going for you any of that kind of stuff?

11:19:00 You can put it in here. if you have volunteer operators.

11:19:04 This is a great place to post that information. You can also set it up that when you do post something you can have an email template that goes out that you choose.

11:19:21 You can send it to people that just like, let people know and direct them to your updates.

11:19:29 So that way they can view whatever the information is that you're trying to share

11:19:34 And you basically just get to come in here, and you can add a new post and

it works similar to the body Content changes.

11:19:45 You put images, text, all that kind of stuff in here. you have, like a header image, a little title to it.

11:19:51 And then you save a as draft you can publish them, and then archived, simply means that it's just no longer visible to the public.

11:20:00 But you can un archive anything so like in this case.

11:20:04 We have this bonus, this giving Wednesday one is archived.

11:20:09 We can go in to edit and we can go ahead and publish it, and it'll go. I don't want to go to draft now.

11:20:18 Rid of it alright. Well, apparently I want to go to draft first.

11:20:21 It's supposed to just go to public first but it's not wanna do that right away, and so but if it goes to draft, then you just simply come back in and you say published, and then it'll change it into published

11:20:34 and then it will now be showing on your story, page and accessible to anyone who comes and visit. cool.

11:20:45 Sorry. But yeah, those are always and again, always happy to talk to folks about ways to utilize this.

11:20:57 And the last big piece, and this has multiple bonus features.

11:21:04 We do have rewards turned off because it gets messy as a kind of like third party situation.

11:21:13 Of all the donations have to come to the Community foundation and then get passed on to the participating nonprofits.

11:21:21 If rewards are being handed, out so if anything has a monetary value like. if people donate \$50, you get a you know T-shirt, or you get a postcard, or what what have you it's

11:21:37 the it's a messy thing with the irs and we're still working on.

11:21:44 How do we do this in a way? that doesn't require a whole bunch of work on your part, and a whole bunch of work on our part to make it happen

11:21:53 One of these years. I feel like there's gotta be a way to make it work.

11:21:59 But until then we unfortunately do have them turned off on the flip side.

11:22:05 If you want to talk to maybe some local businesses.

11:22:11 Who would love to kind of support your organization, either with a larger donation.

11:22:19 Say, like \$500, or something like that you can add them in as like a sponsor and you'd be able to.

11:22:28 What a Derby picture! I totally forgot I had that in here.

11:22:32 Sorry that's strict yeah you just be able to go in here.

11:22:37 Add a new sponsor. You put their logo in here.

11:22:39 You put their name a link to their website if they have one, and then you save it, and then you can have a spot on your fundraising page or your story page. Essentially, that can list.

11:22:51 All of your donors, or all of your sponsors that you have uploaded here.

11:22:57 And alongside sponsors there's also often time matches and matches are simply if somebody donates during in fits within these parameters of a match.

11:23:14 Then additional funds. basically get earned for it. so it's a way to kind of inspire people to give because it's boosted more. So it's like, Oh, you gave \$5 while we have a dollar for

11:23:26 dollar match. so basically your \$5 is turned into \$10, and this is often done through sponsors who want to sponsor a match.

11:23:36 And it is important to note if you do have a match fund, all match funds

have to be paid to after he made out by check, or they can come in and do a credit.
11:23:53 They can call us over the phone and do a credit card.
11:23:55 Go online do a credit card setup and they can.
11:24:00 But all the funds have to come through the Community foundation.
11:24:04 And then we will set up the matches on this on our end.
11:24:08 So after we receive the amounts after, we receive whatever the match amount may be from your sponsor, Then we will get a hold of you, and i'll talk to you about How do you want this to work.
11:24:19 Do you want it to be like a dollar per dollar?
11:24:22 You want to be 2 for one? Do you want it to be only for folks who donate less than \$20?
11:24:32 Do you want to be the match? Only apply on Thursdays.
11:24:38 However, you want to do it. we'll work through and we'll get it all set up but we will set it up on our end, because it does get a little messy and it. if we do it wrong, which I've done
11:24:49 it wrong. i've also had other folks who have done it incorrectly, and it just messes with your donations a whole bunch, and it gets really confusing.
11:25:03 So we just encourage folks to reach out to us.
11:25:06 We will get everything set up. Make sure that it's working correctly.
11:25:11 So we don't have this weird debacle happening during the middle of give local.
11:25:15 But another reminder, and it's also again. a reminder that is posted in the powerpoint that i'll be passing out all of the any match funds or sponsor donations Well, I guess
11:25:32 not sponsor donation. Sorry Any sponsor match funds
11:25:36 Any match funds need to be received by the Community Foundation no later than November fourth.
11:25:45 So that is the Friday before give mobile starts is give local starts on.
11:25:52 Wait this on the Friday before, is it? No, I miss.
11:26:01 I definitely miss type. there's no way that that is it's not the fourth, because good local starts struggling with numbers lately.
11:26:12 On. my goodness, Okay, no. Somehow it is okay. Yup: Yeah.
11:26:18 My brain said that we started on the eighth we started the seventh.
11:26:20 That's why. okay, we're gonna backtrack for a second, for 10 ignore everything that just happened in the last 30 s.
11:26:29 So all match funds need to be received by the community foundation By the end of the day.
11:26:35 On November fourth, which indeed is the Friday, or give local, goes live, if local goes, live on November seventh and ends on November eighteenth. And so we need to have those before give local actually
11:26:52 starts so that way it can apply and we're not scrambling to get it, to apply halfway through the live events.
11:27:04 The last thing is, you can we do have challenges disabled, because again, and gets messy similar to rewards.
11:27:12 But then the last one is just gonna be heroes.
11:27:15 And so heroes also kind of whatever you want it to be you can rename it.
11:27:19 So it's not even heroes But this can be If somebody donates \$25, they automatically get heat listed under the hero section that you have set up. You know auto populates or you can just manually do it like that's what we
11:27:37 had most people do last year is they mostly just added other big donors.

11:27:46 Whether it was an organization or individual, maybe that donated earlier in the year didn't even need to give local I don't have to if you just do manual.

11:27:57 So maybe you got it from other community foundations. You got some.

11:28:01 You got a grant. You want to put all your grant, you know, like funders in this space.

11:28:07 Go for it more than welcome to do that like this is this is more about you than is about us, so we're not gonna get jealous.

11:28:16 We just love to see what you're doing and We love to see you get to continue doing what you do, and that is everything. for the moment any questions as we stare at this cute little weasel

11:28:43 Always feel free to come off mute. Post Something in the chat. again.

11:28:47 If you think of something after this session go ahead and feel free to contact me anytime my contact information is on the screen.

11:29:01 Call me by phone, you can send me an email. And yeah, you can also get a whole pretty much.

11:29:11 Anyone here at the Community Foundation and at the very least they can direct you to me.

11:29:17 If they don't know the answer to the question So we're gonna go ahead and i'm just gonna do stop sharing, and we are right there at the end of time.

11:29:35 And is there. So I just wanna you know make sure that folks don't have any last minute questions, or if there's something you want me to go back through really quick.

11:29:46 I will still be on here for i'm still available for another few more few minutes, so definitely happy to stay on and chat about anything.