

Managing your Fundraisers



Agenda

Overview

Setting Up a New Fundraiser Campaign

Sharing the Donation Link

Managing Donations

Fundraising Reports

Fundraisers...Help Your Community!



COVID-19... Impacts the small businesses in your community!
How your chamber/association can help...Create Small Business Relief Campaigns

Fundraisers...Help Your Community!



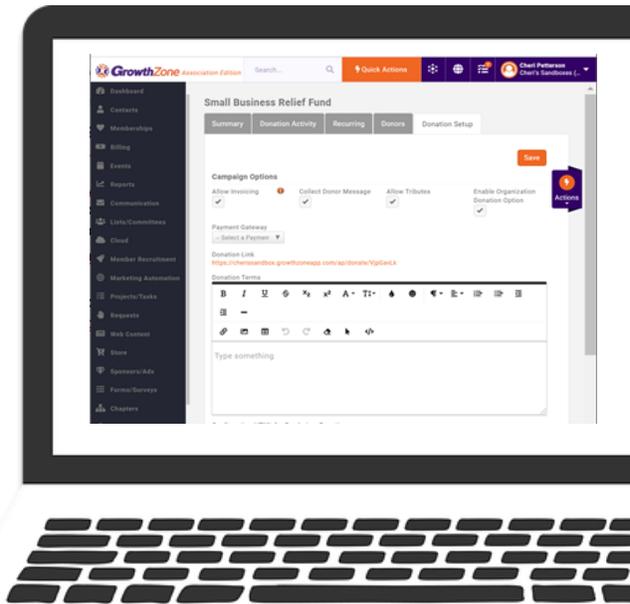
GrowthZone can help you help them!

Using the GrowthZone Fundraising module you can create fundraising campaigns, promote those campaigns & manage donations

Setup your Fundraiser Campaign

Pre-requisites

- ✓ Setup Goods/Services to be used for donations/you wish to be sent after someone contributes pledges. Type = Donation
- ✓ Create an Email Template that will be sent as a thank you to your donors
- ✓ If you wish to use a separate gateway for donations, configure the required gateway

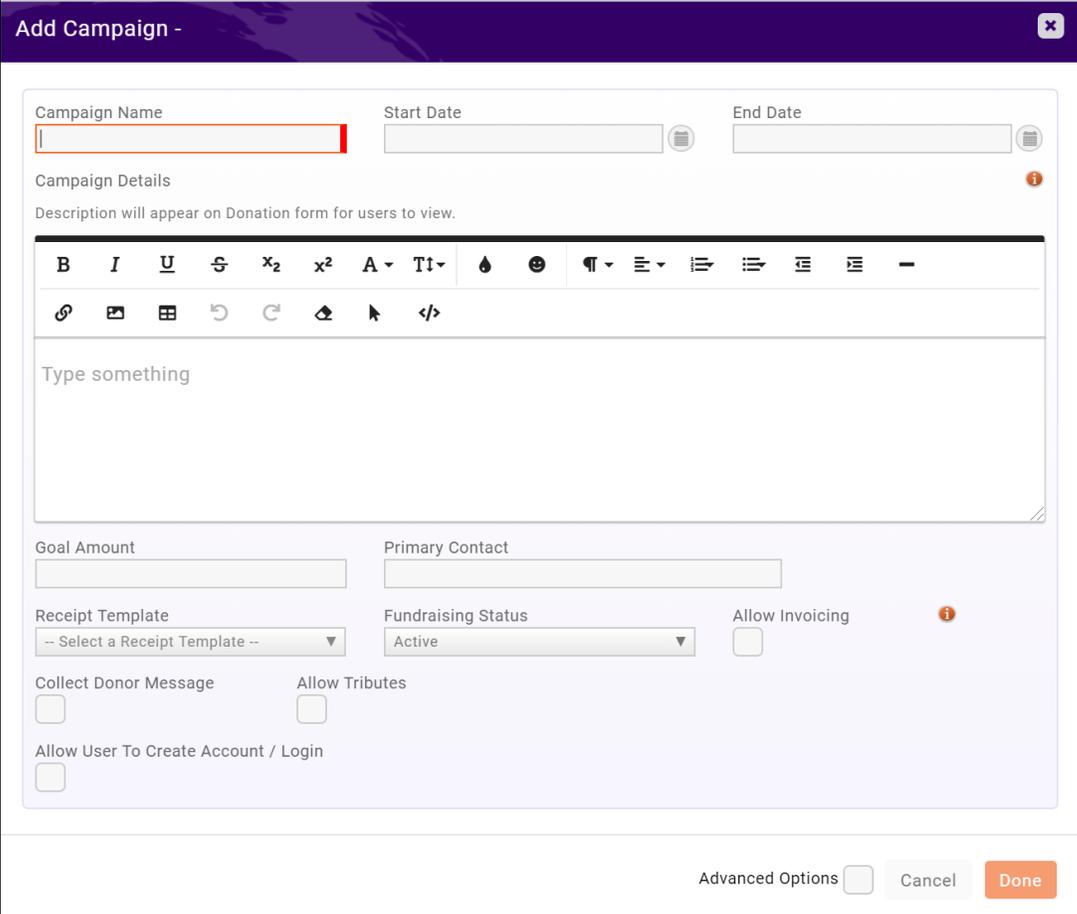


Add Your Fundraiser Campaign

Provide a name and description of your campaign both are displayed on your fundraiser page, make them compelling with a call to action!

See recommendations: [Increase Charitable Donations With These 5 Words](#)

KB: [Add a Fundraiser Campaign](#)



The screenshot shows a web form titled "Add Campaign" with a dark purple header. The form includes several input fields and options:

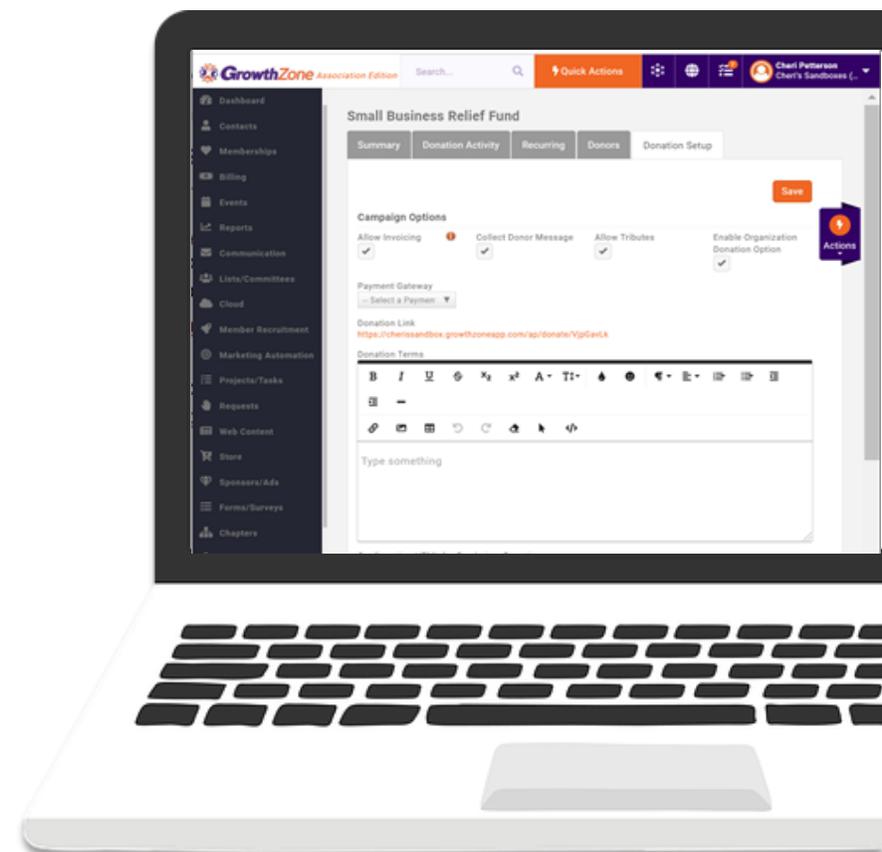
- Campaign Name:** A text input field with a red border.
- Start Date:** A date selection field.
- End Date:** A date selection field.
- Campaign Details:** A section with a sub-header "Description will appear on Donation form for users to view." and a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, subscript, superscript, font color, text color, bulleted list, numbered list, link, unlink, table, undo, redo, link icon, and code.
- Goal Amount:** A text input field.
- Primary Contact:** A text input field.
- Receipt Template:** A dropdown menu with the option "-- Select a Receipt Template --".
- Fundraising Status:** A dropdown menu with the option "Active".
- Allow Invoicing:** A checkbox.
- Collect Donor Message:** A checkbox.
- Allow Tributes:** A checkbox.
- Allow User To Create Account / Login:** A checkbox.

At the bottom right of the form, there are three buttons: "Advanced Options" (with a checkbox), "Cancel", and "Done".

Setup a Fundraiser Campaign

Assign Donation Fees

- *Suggest Donation Amounts*
- *Allow Donors to Setup a Recurring Donation*
- *Allow Donors to enter own Amount*
- *Allow Donations on behalf of Organization*



Setup a Fundraiser Campaign

Edit Donation Item
✕

Item <input type="text" value="Small Business Donation"/>	Description <input type="text" value="Small Business Donations"/>	Is Pledge <input checked="" type="checkbox"/>	Default To Suggested Amount <input checked="" type="checkbox"/>
Minimum Amount <input type="text" value="5"/>	Suggested Amount <input type="text" value="25"/>	Show Minimum Amount <input checked="" type="checkbox"/>	Allow Custom Amount <input checked="" type="checkbox"/>
Allow donor to select donation start date <input checked="" type="checkbox"/>		Suggested Amounts	
		<input type="text" value="50"/>	
		<input type="text" value="100"/>	

Cancel Done

Small Business Relief Fund

Description

This Initiative will supply financial assistance and support to small businesses in the Green Valley Community by providing grants, tools and resources to help during the COVID-19 crisis. You can make a difference by making a small donation to this fund. Make a donation today, to help our small business continue to thrive during these difficult times.



Earth Association

Information

Gift Designation

Type	Suggested Amount	Gift Amount	Frequency	Total
Small Business Donations <small>(Minimum Amount: \$5)</small>	<input type="text" value="25"/>	<input type="text" value="25"/>	<input type="text" value="One Time"/>	<input type="text" value="25"/>
	<input type="text" value="25"/>			
	<input type="text" value="50"/>			
	<input type="text" value="100"/>			
				Total Amount
				<input type="text" value="25.00"/>

Personal Info

Share your Campaign

- ✓ A link to your campaign page is automatically created on the Setup screen
- ✓ This link can be shared in a variety of ways, i.e. via mass email, embedded as a page on your website, etc.



Click here to
Donate today!

Businesses across our community are being negatively affected by the economic effects of COVID-19A and need your support! These are our friends and neighbors, and we believe it's important we help them confront the economic challenges they face. Green Valley Chamber has created A Small Business Relief Fund to help! Our goal is to help our neighborhood small businesses maintain their livelihood, and continue to foster a vibrant community during these difficult times.

Update/Edit Campaign Details

Changes/Updates to the basic information (displayed on the Summary tab) by clicking the large purple Actions button

Small Business Relief Fund

Summary | Donation Activity | Recurring | Donors | Donation Setup

General Information

Campaign Name	Small Business Relief Fund
Campaign Status	Active
Start Date	3/25/2020
End Date	8/31/2020
Description	This Initiative will supply financial assistance and support to small businesses in the Gr ...
Primary Contact	Cheri Petterson

Donation Statistics

Number of Donations	
Goal Amount	
Current Amount Paid	
Remaining Pledged Amount	
Remaining to Goal	

Actions

- Edit Campaign
- Add
- Enter Cash Donation
- Send email to Donors
- Delete Campaign

KB: [Update Campaign Details](#)

Manage Your Donations

Donation Process Flow

1. *Donation is entered from the donation form or from the back-office*
2. *A Thank You email is sent to the Donor*
3. *Staff who have subscribed to “On-line Donation Notice” will receive a notification*
4. *If the donor chose to pay by credit card:*
 - Invoice & payment recorded on the donor's Billing tab
 - If the donor has chosen a recurring option, schedule is setup on the Billing tab
5. *If the donor chose to be invoiced*
 - An invoice is generated, not sent
 - The invoice is recorded on the contact's Billing tab
 - If the donor has chosen a recurring option, schedule is setup on the Billing tab

IMPORTANT: If the donor is NOT a contact in your database, one will be created as a Non Member

Manage Donations

Enter a Donation from the Back-office

- *If you are contacted by a donor, and they wish you to enter a donation for them, you can easily do this from the back-office*
- *KB: Manually Add Donations from the Back-office*

Small Business Relief Fund

Summary | Donation Activity | Recurring | Donors | Donation Setup

General Information

Campaign Name	Small Business Relief Fund
Campaign Status	Active
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Description	This Initiative will supply financial assistance and support to small businesses in the Gr...
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Donation Statistics

Number of Donations	
Goal Amount	
Current Amount Paid	
Remaining Pledged Amount	
Remaining to Goal	

Actions

- Edit Campaign
- Add Donations
- Enter Cash Donation
- Send email to Donors
- Delete Campaign

Manage Donations

Enter a Donation & Check from the Back-office

- ✓ If you have received checks from individual who wish to make a one time donation, and who have not filled in your donation form, you can easily add the donation information and the payment at the same time
- ✓ Not to be used to pay for an existing invoice
- ✓ KB: Add a Donor & Check Simultaneously

Small Business Relief Fund

Summary | **Donation Activity** | Recurring | Donors | Donation Setup

General Information

Campaign Name	Small Business Relief Fund
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Description	This Initiative will supply financial assistance and support to small businesses in the Gr...
Primary Contact	Cheri Petterson

Donation Statistics

Number of Donations	
Goal Amount	
Current Amount Paid	
Remaining Pledged Amount	
Remaining to Goal	

Actions

- Edit Campaign
- Add Donations
- Enter Cash Donation
- Send email to Donors
- Delete Campaign

View All Donation Activity

You can view a summary of all donations, on the Donors tab.

Small Business Relief Fund

Summary | Donation Activity | Recurring | **Donors** | Donation Setup

Search... Show only... Customize Results... [Add Donations](#)

Contact	Donations	Donated Total	Amount Collected/Paid	Total Committed
A Place for Dogs	1	\$100.00	\$0.00	\$1,300.00
Grandy's	1	\$25.00	\$0.00	\$325.00
Bennie's Wine Ship	1	\$500.00	\$0.00	\$500.00

[Actions](#)

Manage Recurring Donations

You can view and manage donors who have recurring donations on the fundraiser Recurring tab

KB: [Manage Recurring Donations](#)

Small Business Relief Fund

Summary | Donation Activity | Recurring | Donors | Donation Setup

Search...

Contact	Frequency	Total Pledge	Recurring Amount	Paid	Remaining	Start Date	End Date	Status	Ref #	Actions
A Place for Dogs	Monthly	\$1,300.00	\$100.00	\$0.00	\$1,300.00	3/26/2020	3/26/2021	Active	1	
Grandy's	Monthly	\$325.00	\$25.00	\$0.00	\$325.00	3/26/2020	3/26/2021	Active	1	

View Full List of Donors

You can view the full list of your donors on the Donors tab.

KB: [Manage Recurring Donations](#)

Small Business Relief Fund

Summary | Donation Activity | Recurring | Donors | Donation Setup

Search... Customize Results... Add Donations

Contact	Frequency	Total Pledge	Recurring Amount	Paid	Remaining	Start Date	End Date	Status	Ref #	Actions
A Place for Dogs	Monthly	\$1,300.00	\$100.00	\$0.00	\$1,300.00	3/26/2020	3/26/2021	Active	1	
Grandy's	Monthly	\$325.00	\$25.00	\$0.00	\$325.00	3/26/2020	3/26/2021	Active	1	

Send an E-mail to all Donors

- After responding to an appeal, donors are too often left wondering how their money is being used and whether it will actually have an impact...
- Keep your donors up to date on how the funds are being used!
- KB: [Send an E-mail to all Donors](#)
- See other ideas for keeping in touch with your donors:
<https://www.classy.org/blog/want-donors-to-give-again-read-this/>

Donation Reports

Donation Reports

Fundraiser History by Donor: The Fundraising History By Donor Report allows you to easily view the sum of donations for individual donors or all donors.

KB: Fundraiser History by Donor

Results

Campaign Name	Donation/Pledge Item	Donation/Pledge Description	Donation Date	Donor Name	Donor Email	Donor Address	Donor City	Donor State Province	Donor Postal	Donor Phone	Is Pledge	Fr
Special Olympics	Special Olympics Pledge	Special Olympics Pledge	1/11/2020	Cheri Petterson	cheri.petterson@growthzone.com	547 Lilac Avenue	Crosslake	MN	56442	218-546-3456	No	M
Special Olympics	Special Olympics Pledge	Special Olympics Pledge	2/11/2020	Cheri Petterson	cheri.petterson@growthzone.com	547 Lilac Avenue	Crosslake	MN	56442	218-546-3456	No	M
Special Olympics	Special Olympics Pledge	Special Olympics Pledge	3/11/2020	Cheri Petterson	cheri.petterson@growthzone.com	547 Lilac Avenue	Crosslake	MN	56442	218-546-3456	No	M
Special Olympics	Special Olympics Pledge	Special Olympics Pledge	4/11/2020	Cheri Petterson	cheri.petterson@growthzone.com	547 Lilac Avenue	Crosslake	MN	56442	218-546-3456	No	M
Small Business Relief Fund	Small Business Donations	Small Business Donations	3/26/2020	A Place for Dogs	cheri.petterson@growthzone.com	24400 Smiley Road	Nisswa	MN	56468		Yes	Q
Small Business Relief Fund	Small Business Donations	Small Business Donations	3/26/2020	Grandy's	grandy@mailinator.com	23541 Main Street	Crosby	MN	56441		Yes	6

Donation Reports

Recurring Donations Report: The **Recurring Donations Report** allows you to generate a list of all contacts who have setup recurring donations for a fundraiser. This may be useful in budgeting and planning.

KB: Recurring Donations Report

Results												
Donor Name ↕	Campaign Name ↕	Pledge/Donation Item ↕	Status ↕	Gift Designation ↕	Donation Created Date ↕	Donation Start Date ↕	Donation End Date ↕	Total Donation Amount ↕	Donation Amount Paid ↕	Donation Amount Remaining ↕	Tribute Name ↕	Frequency ↕
A Place for Dogs	Small Business Relief Fund	Small Business Donations	Inactive	Small Business Donations	3/26/2020	3/26/2020	9/26/2020	1,300.00	0.00	0.00		Quarterly
Grandy's	Small Business Relief Fund	Small Business Donations	Active	Small Business Donations	3/26/2020	3/26/2020	3/26/2021	325.00	0.00	325.00		Monthly
Aiden Greene	Small Business Relief Fund	Small Business Donations	Active	Small Business Donations	3/27/2020	3/27/2020	3/27/2020	0.00	0.00	0.00		Quarterly
Tulips	Small Business Relief Fund	Small Business Donations	Active	Small Business Donations	3/27/2020	3/27/2020	11/27/2020	225.00	0.00	225.00		Monthly
Allison Wilson	Special Olympics	Special Olympics Pledge	Active	Special Olympics Pledge	12/21/2018	12/21/2018		0.00	1,000.00	-1,000.00		Annually
Cheri Petterson	Special Olympics	Special Olympics Pledge	Active	Special Olympics Pledge	11/11/2019	11/11/2019		0.00	0.00	0.00		Monthly
								1,850.00	1,000.00	-450.00		
Count 6												

In conclusion...

A great way to support your community businesses during these uncertain times is to start a fundraising campaign. GrowthZone is helping you help them by through the Fundraising Module.

See full details and instructions in our on-line WIKI: [Fundraising](#)

A 3D graphic of the word "DONATE!" in white, bold, sans-serif capital letters. The letters are raised and have a green shadow underneath them, giving a sense of depth. The exclamation point is also 3D and green.

Questions?

