

GiveGab®

Nonprofit Giving Platform

# Supporter Management 101

*Tips and Best Practices for Managing and Organizing Your  
Supporters on GiveGab*

[www.GiveGab.com](http://www.GiveGab.com)



# Benefits of Organizing Supporter Data

- Helps your organization better understand its supporters
  - How long have they been supporting your organization?
  - Do they have a specific cause they are interested in?
  - Do they donate their time? Money? Items? Sponsorship?
- Allows you to personalize your communications & stewardship plan
  - Distinguish between smaller and major donors, repeat donors and new, and tailor your communications appropriately
  - Easily re-engage supporters from year to year and event to event!

**In turn, this leads to happier supporters and higher donor retention!**



# Key Questions to Think About

- What information is most important to your organization?
- How will you use the information collected?
- How does this information tie into your stewardship plan?

# Managing Your Supporters on GiveGab



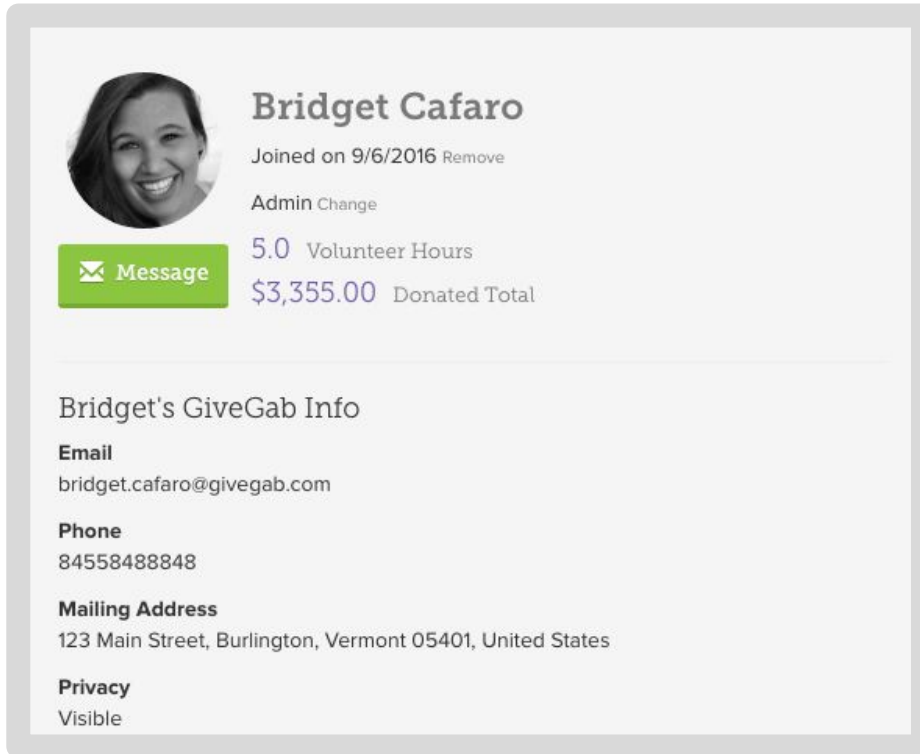
# Everything At Your Fingertips

- Collecting important supporter information & history
- Creating custom properties, tags, & notes
- Getting the most out of your campaign analytics



# Collect Important Supporter Information

- On GiveGab, you will receive the following information about your donors:
  - Name and email address
  - Phone number and mailing address
  - Complete donation history, including donation amounts & any recurring donations
  - Fundraising history
    - Has this person created a personal P2P fundraising page to help fundraise for you?
  - Volunteer history
  - Donor traffic sources
    - **Answer questions such as:** How many of your donors coming to you from social media?
- On the **Boost** plan, you also have the ability to create custom tags & notes to help you label and segment your donors, and easily search your donor base.



**Bridget Cafaro**  
Joined on 9/6/2016 [Remove](#)  
[Admin Change](#)  
5.0 Volunteer Hours  
\$3,355.00 Donated Total

[Message](#)

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**Bridget's GiveGab Info**

**Email**  
bridget.cafaro@givegab.com

**Phone**  
84558488848

**Mailing Address**  
123 Main Street, Burlington, Vermont 05401, United States

**Privacy**  
Visible

- **Contact information**
  - Easily send an email using the green “Message” button
  - View the supporter’s phone number and mailing address they have provided
- **Donation history**
  - View the total amount the supporter has donated
- **Volunteer history**
  - View the supporter’s volunteer hours

# Detailed Supporter Information

- **Donation history**
  - Which campaigns have they donated to?
  - Do they have any recurring donations or offline donations?
- **Volunteer history**
  - Which volunteer opportunities have they participated in?
- **Fundraising history**
  - Which campaigns or events did they fundraise for?
  - How much did they raise?

## Donation History Record New Gift

Date	Amount	Campaign	Anonymous	Covered Fees	Recurring	Type
4/28/2017	\$100.00	Save A Senior Dog!	No	No	No	Offline
4/19/2017	\$500.00	2017 Dog Walkathon & 5K!	No	Yes	No	Online
3/16/2017	\$100.00	Logan's Bones	Yes	Yes	No	Online
3/16/2017	\$100.00	Save A Senior Dog!	Yes	Yes	No	Online
3/16/2017	\$100.00	#GivingTuesday on GiveGab	No	Yes	No	Online
3/15/2017	\$100.00	Save A Senior Dog!	Yes	Yes	No	Online
3/15/2017	\$50.00	#GivingTuesday on GiveGab	No	Yes	No	Online
3/15/2017	\$100.00	Save A Senior Dog!	No	Yes	No	Online
1/17/2017	\$40.00	Logan's Bones	No	Yes	No	Online
12/19/2016	\$100.00	#GivingTuesday on GiveGab	No	Yes	No	Online
11/22/2016	\$100.00	Logan's Bones	No	Yes	No	Online
11/18/2016	\$100.00	#GivingTuesday on GiveGab	No	Yes	No	Online
11/2/2016	\$100.00	Logan's Bones	No	Yes	No	Online
9/6/2016	\$100.00		No	Yes	No	Online
9/6/2016	\$10.00		No	Yes	No	Online

## Volunteer History

Date	Hours	Opportunity	Task
1/5/2017	3.0	Gift Wrap Bones for the Holidays!	
11/19/2016	2.0	Dog Food Drive!	

## Fundraising History

Campaign	Amount Raised	Goal	% Complete	Num Donations
2017 Dog Walkathon & 5K!	\$500.00	\$500.00	100%	1
Logan's Bones	\$100.00	\$500.00	20%	1





# Maximizing Your Supporter Data!

- Send personalized thank you's to fundraisers, volunteers, or donors
  - Easily customize messaging to the campaign or event they participated in!
- Welcome first time supporters to your organization
  - Get to know first time donors and start cultivating new relationships!
- Offer special deals and rewards to your repeat and major donors
  - Use your data to understand which relationships to prioritize and steward
- Gather information about what types of events different individuals are interested in, and send them communications about future events they may like
  - The more personal you are, the more likely your supporters are to engage!



# Custom Properties, Tags, & Notes

- Enhanced Supporter Engagement available on the [Boost](#) plan
- Custom Properties
  - Searchable and sortable details that can be assigned to your list of contacts
- Custom Tags
  - Allow you to group supporters
  - Facilitates the process of segmenting your donors
- Custom Notes
  - Allow you to record additional information about specific individuals
  - Offer a place to record and keep track of when communications are sent out



# Custom Supporter Profiles



**Bridget Cafaro**

Joined on 9/6/2016 [Remove](#)

[Admin Change](#)

5.0 [Volunteer Hours](#)

\$1,700.00 [Donated Total](#)



## Bridget's GiveGab Info

**Email**  
bridget.cafaro@givegab.com

**Phone**  
84558488848

**Mailing Address**  
123 Main Street, Ithaca, New York 14850, United States

**Privacy**  
Visible

**Contact Information** [Edit](#)

**Email**

**Phone**

**Mailing Address**

**Custom Properties** [Manage](#)

**How do you prefer to be contacted?** [Edit](#)

**Email**

**Birthday** [Edit](#)

4/4/2017 12:00 am

**T-shirt Size** [Edit](#)

M

**Eye color** [Edit](#)

Hazel

**Shoe size** [Edit](#)

8

**Tags**

[+ Add Tag](#)

[#givingtuesday donor](#) [2016 volunteer](#) [adopted a pet](#) [april birthday](#)

[givek in dec](#) [mailor](#) [parents donate](#) [totary](#)

**Notes**

[+ Add Note](#)

Created by: Bridget Cafaro on 4/19/2017

Adopted Senior Dog Mt. Pickles on 7/7/16

## Donation History [Record New Gift](#)

Date	Amount	Campaign	Anonymous	Covered Fees	Recurring	Type
4/28/2017	\$100.00	Save A Senior Dog!	No	No	No	Offline
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9/6/2015	\$10.00	Logan's Bones	No	Yes	No	Online

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Additional features are available with the **Boost** plan!

### View:

- Your supporter's detailed donation history including recurring donations
- Full volunteer history including the opportunity, task, and date
- Fundraising history

### Create:

- **Custom properties** - Identify your supporter's birthday, clothing sizes, how they would prefer to be contacted, and more
- **Tags** - Easily show information such as whether this supporter is a volunteer, donated to a specific campaign, and use these tags to group all supporters to whom they apply
- **Notes** - Keep track of other ways your supporter has been involved with your organization and your communications with them



# Example: Custom Properties

- Use custom properties to record specific information about your supporters!

- Personalize your communications by:
  - Acknowledging participation in a specific event
  - Mentioning pets or family members
  - Sending a special note on your supporters' birthday
  - And more!

Custom Properties Manage

<b>Address Lines</b> 505 Main St	Edit  Clear
<b>Birthday</b> 4/4/2018 12:00 am	Edit  Clear
<b>Board affiliation</b> true	Edit  Clear
<b>City</b> Ithaca	Edit  Clear
<b>Company</b> GiveGab	Edit  Clear
<b>Dog owner</b> true	Edit  Clear
<b>Dog's name?</b> Henry	Edit  Clear
<b>Forum Attended?</b> Yes	Edit  Clear



# Example: Tags

- Tags are especially helpful for segmenting your donors!

- Use tags to identify:
  - Larger donors and lower capacity donors
  - Volunteers
  - Fundraisers
  - Events & hobbies a supporter likes

The screenshot shows a 'Tags' section with a '+ Add Tag' button in the top right corner. The tags are displayed as green rounded rectangles with a white 'x' icon in the top right corner of each tag, indicating they can be removed. The tags are arranged in several rows:

- #givingtuesday donor
- 2018 board member
- 2018 donor
- adopted a pet
- aluma
- annual appeal
- april birthday
- attended december donor party
- board affiliation
- cafaro family
- dog name
- dog walking
- in kind gift
- june birthday
- kids birthday
- large donor (\$100k+)
- likes card tricks
- loves pizza!
- may birthday
- millennial
- parents donate
- phone number
- resides in fl oct-mar
- reunion17
- shoe size 8.5
- ski club
- sponsor
- volunteer 2018
- volunteers 2018



# Custom Notes


- Keep track of your supporters' participation
- Specify what they did to help you (for example, adopting a pet)
- Record when you send out communications
- Write a longer, more detailed description of supporters' interests, preferences, & activities, and then acknowledge these details when you interact with them

### Notes

[+ Add Note](#)


Created by: Kyle Cundy on 5/9/2017

Sent handwritten thank you on 5/8/17



Created by: Bridget Cafaro on 4/19/2017

Adopted Senior Dog Mr. Pickles on 7/7/16





# Maximizing Your Custom Data!

- Create unique custom fields that apply to your supporter base
  - Position/job title within the organization
  - T-shirt sizes for free giveaways
  - Dietary restrictions for your next event
- Group supporters for personalized and targeted communications
  - Segment your major donors and lower capacity donors
  - Adding a description of the supporter as the tag such as "Active Volunteer" or "Board Member." You can also use tags to highlight supporter segments like "Giving Tuesday Donor" or "2016 Marathon Runner"
  - Filter your communication by tag segment, so that you can create more engaging content that speaks to what will interest each target audience most, as opposed to always messaging all of your supporters about every opportunity



# Utilizing Your Analytics



25 Donors

85% of Donors cover fees



0 Fundraisers

0% Raised by Fundraisers



46.2% Raised on GiveGab

53.8% Raised outside of GiveGab



\$32.96 Avg. Online Gift Size

18 Online Donors Acquired

5 Repeat Online Donors

## Traffic Sources

Source	Medium	Sessions
(direct)	(none)	1
lm.facebook.com	referral	1
app.bitly.com	referral	0
app.intercom.io	referral	0
app.periscopedata.com	referral	0

## Donation Sources

View by:

Source	Number of Donations
None	12
www.google.com	5
l.facebook.com	3
www.facebook.com	1
www.bing.com	1





# Enhanced Campaign Analytics

1. **Recent Donation Volume by Date:** View your recent donations made to your campaign by date and amount.
2. **Total Donation Volume by Date:** View the total gift volume over the entire duration of your fundraising campaign on GiveGab.
3. **Donors & Fees:** See how many supporters have donated to your campaign and the percentage of supporters that opted to cover the fees on your behalf.
4. **P2P Fundraisers:** See how many P2P fundraisers donated and what percentage of the total donations were brought in by your fundraisers
5. **% Raised On/Outside of GiveGab:** This represents the distribution between online and offline donations for your campaign
6. **Gift Acquisition:** See your average gift size, new donors, and repeat donors on GiveGab.
7. **Traffic Sources:** Learn where your donors are finding your campaign so you know the best places to share it out.



# Maximizing Your Campaign Analytics!

- Understand donor behavior and where your donations are coming from
  - How many donations were made online vs. offline? On mobile devices?
  - How many donations were made after a visit to a social media page? A Google search?
    - [Identify the best places to share your campaigns!](#)
  - How many new and repeat donors donated to your campaign?
  - How many fundraisers did you have and what percentage of your goal did they raise?
    - [Ensure you have a strong stewardship plan in place](#)
- Better prioritize your outreach and communication plan for future campaigns and events run by your organization



# Key Takeaways

- Supporter management enhances donor/nonprofit relationships and your own experience on GiveGab as an administrator
- Use donor information and history to improve stewardship and communications
- Campaign analytics help you understand donor behavior and determine where to focus your attention
- Use custom properties, tags, and notes to help you organize, segment, and steward your donors

# GiveGab<sup>®</sup>

Nonprofit Giving Platform

# Thank You!

Have questions? Email us at [customersuccess@givegab.com](mailto:customersuccess@givegab.com)

www.GiveGab.com