

onecause®

Welcome to our Webinar

Let's Get Acquainted!

Share in the chat your name, location, and cause or organization,
(and the weather in your area)!



onecause® | WEBINAR

FINISHING STRONG

Leveraging **Online Giving** to
Drive Real **End-of-Year Impact**



Wednesday, August 14, 2024



Steve Lausch
Director, Product Marketing
OneCause



Joe Duca
VP, Product Strategy
OneCause

Let's Get Started!

What's your favorite movie, or one you're currently watching or streaming?



Beyond the Webinar

- ✓ Recording and slides will be sent via email.
- ✓ Look out for exclusive Bonus Content!
- ✓ Visit [OneCause.com/Resources](https://www.onecause.com/resources) for on-demand webinars.
- ✓ Add questions, comment or send emojis in the Chat.
- ✓ Help share on social!

YOUR FEEDBACK MATTERS: WRAP-UP SURVEY

WIN: Amazon Gift Card
Help drive future webinar content!



Meet Our Presenters



Steve Lausch

Director, Product Marketing
OneCause

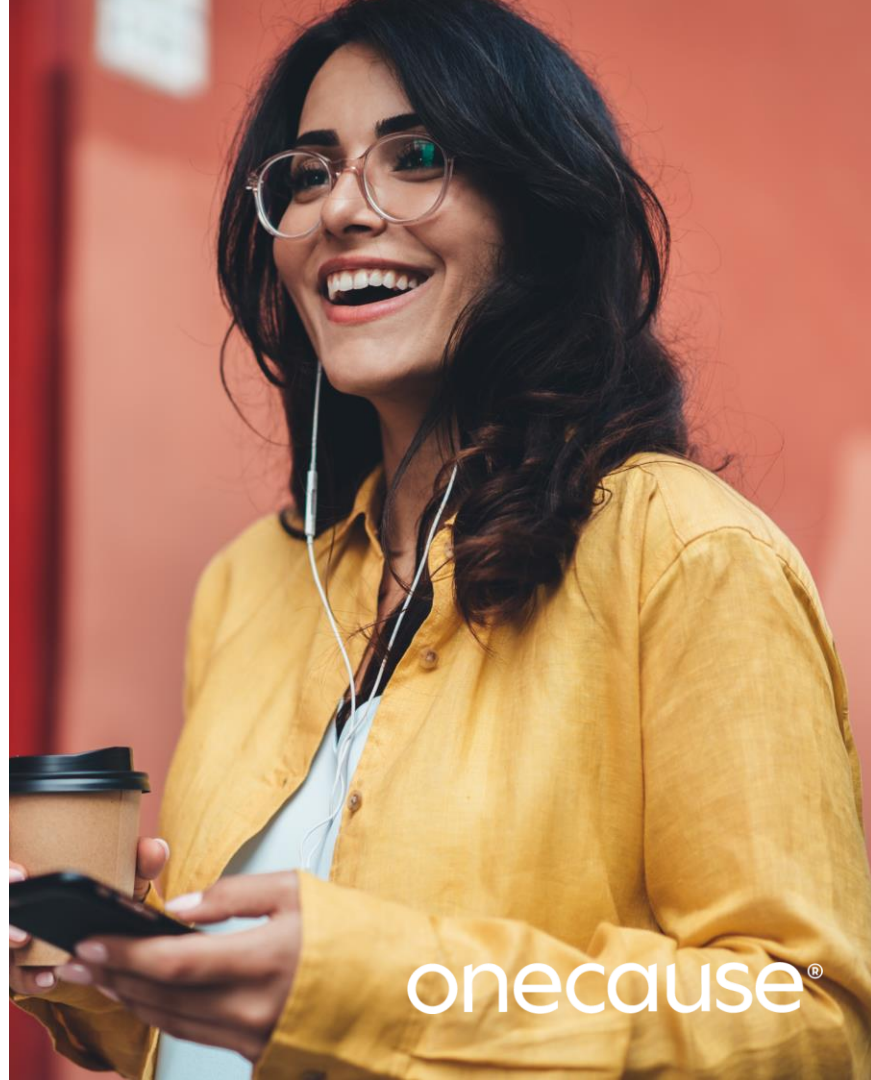


Joe Duca

VP, Product Strategy
OneCause

WHAT WE'LL COVER TODAY

- ✓ Prepare for your year-end campaign
- ✓ Connect your goals with technology
- ✓ Build a cohesive multi-channel presence
- ✓ Take advantage of available resources



onecause®



NOT YET

WITH ONECAUSE

**TIPS,
IDEAS &
BEST
PRACTICES**



NOT YET

ON PLATFORM

**WHAT'S
DIFFERENT
& EVEN
BETTER?**



ALREADY

ON PLATFORM

**WHAT'S
NEW &
AVAILABLE
TO USE?**



onecause®

FINISHING STRONG

BEFORE YOUR CAMPAIGN

onecause®

Before Your Campaign

- ✓ Plan earlier than you think is necessary

Before Your Campaign

- ✓ Plan earlier than you think is necessary
- ✓ Answer “How might we ... ?”
 - Meaningfully engage current donors in advance
 - Capture attention of new donors sooner
 - Educate audiences on impact
 - Invite individuals and businesses to participate



Before Your Campaign

- ✓ Plan earlier than you think is necessary
- ✓ Answer “How might we ... ?”
 - Meaningfully engage current donors in advance
 - Capture attention of new donors sooner
 - Educate audiences on impact
 - Invite individuals and businesses to participate
- ✓ Establish goals, incl how Giving Days fit into your plan

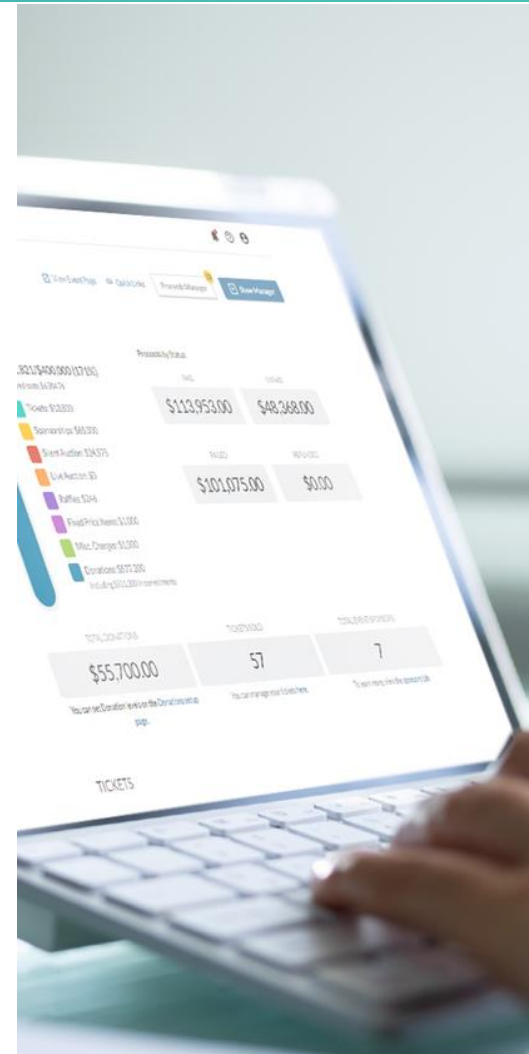
Giving Tuesday

- Not for everyone (*and that's OK!*)
- Opportunity to attract new donors
- Take advantage of a day focused on nonprofit missions
- Excellent way to kick off year-end fundraising efforts
- Try, test, and refine
- Utilize helpful resources at onecause.com/resources



Before Your Campaign

- ✓ Plan earlier than you think is necessary
- ✓ Answer “How might we ... ?”
 - Meaningfully engage current donors in advance
 - Capture attention of new donors sooner
 - Educate audiences on impact
 - Invite individuals and businesses to participate
- ✓ Establish goals, incl how Giving Days fit into your plan
- ✓ **Connect your goals with your technology**

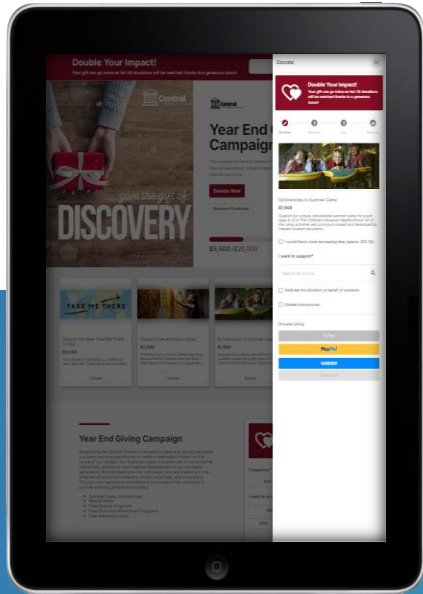


FINISHING STRONG

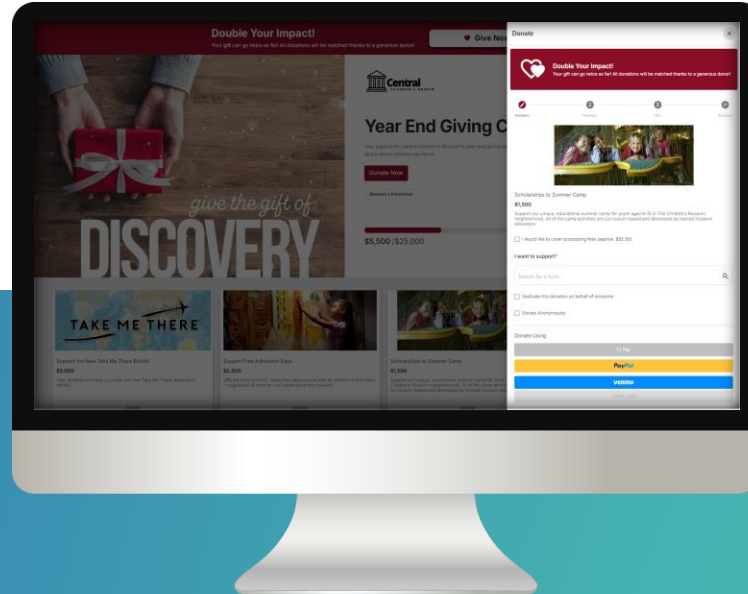
CONNECT YOUR GOALS WITH TECHNOLOGY

onecause®

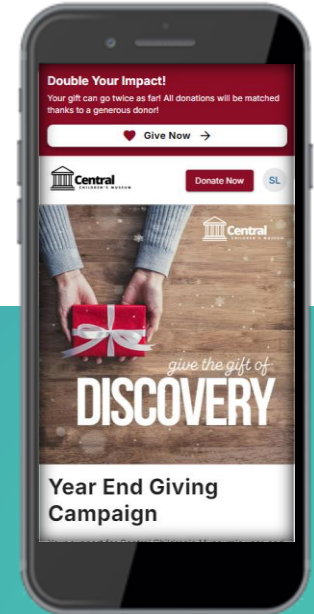
A Complete Online Fundraising Solution



EMBEDDED & MOBILE
DONATION FORMS
(Text2Give®)

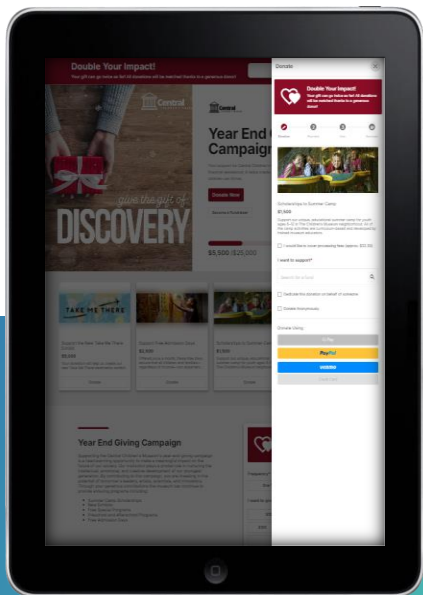


ONLINE GIVING
SITES



PERSONAL
FUNDRAISING PAGES

Embedded and Mobile Forms



EMBEDDED & MOBILE
DONATION FORMS
(Text2Give®)

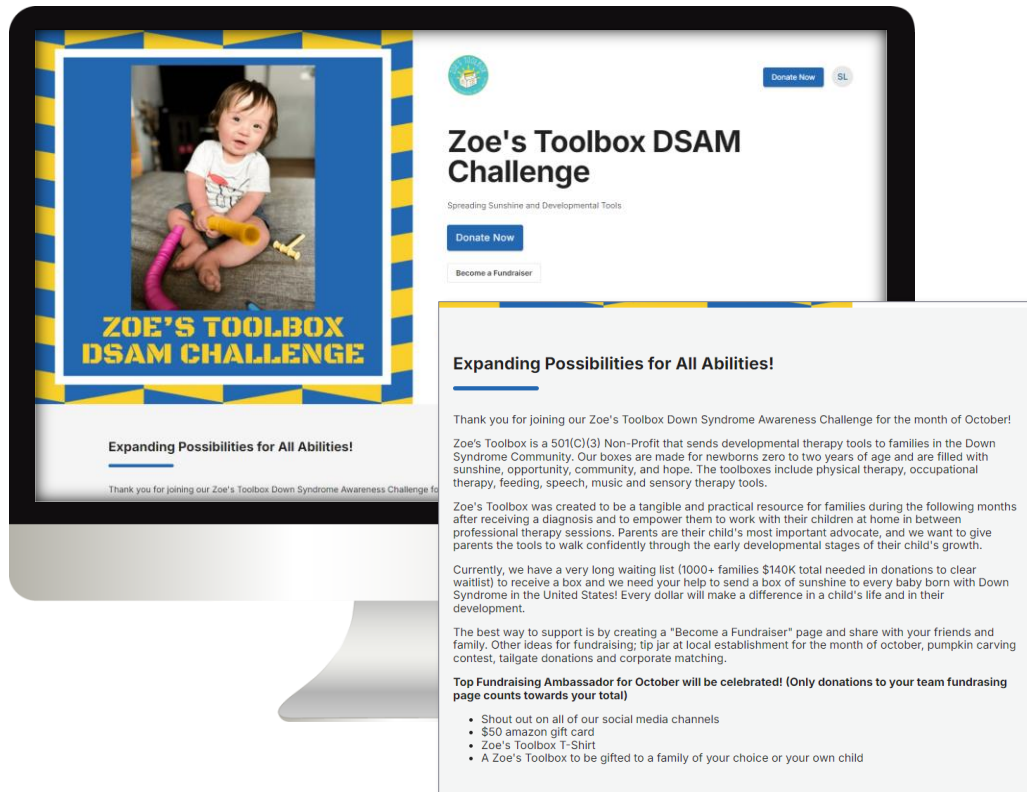
Why it's important to examine your embedded and mobile forms:

1. Use for existing donors who don't need education about your mission
2. Needs to be low friction
3. Simplest Donation should be a few clicks
4. Conversion Rate

Online Giving Site

7 Ingredients for a Successful Online Giving Campaign

1. Compelling Story



Zoe's Toolbox DSAM Challenge

Spreading Sunshine and Developmental Tools

[Donate Now](#)

[Become a Fundraiser](#)

Expanding Possibilities for All Abilities!

Thank you for joining our Zoe's Toolbox Down Syndrome Awareness Challenge for the month of October!

Zoe's Toolbox is a 501(C)(3) Non-Profit that sends developmental therapy tools to families in the Down Syndrome Community. Our boxes are made for newborns zero to two years of age and are filled with sunshine, opportunity, community, and hope. The toolboxes include physical therapy, occupational therapy, feeding, speech, music and sensory therapy tools.

Zoe's Toolbox was created to be a tangible and practical resource for families during the following months after receiving a diagnosis and to empower them to work with their children at home in between professional therapy sessions. Parents are their child's most important advocate, and we want to give parents the tools to walk confidently through the early developmental stages of their child's growth.

Currently, we have a very long waiting list (1000+ families \$140K total needed in donations to clear waitlist) to receive a box and we need your help to send a box of sunshine to every baby born with Down Syndrome in the United States! Every dollar will make a difference in a child's life and in their development.

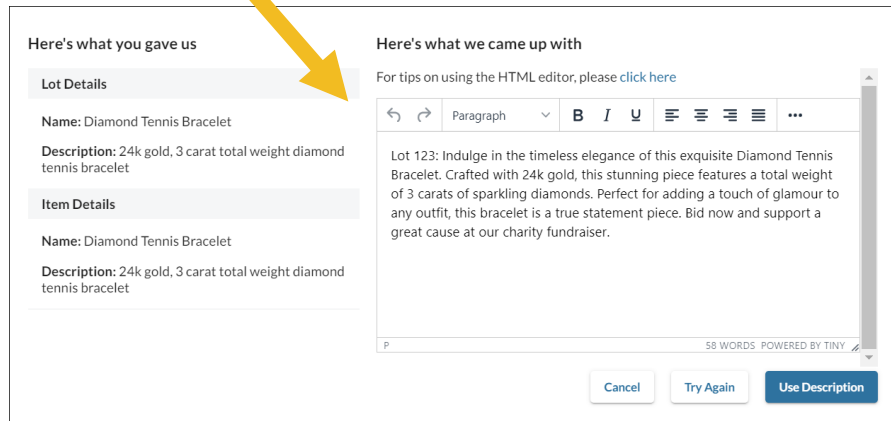
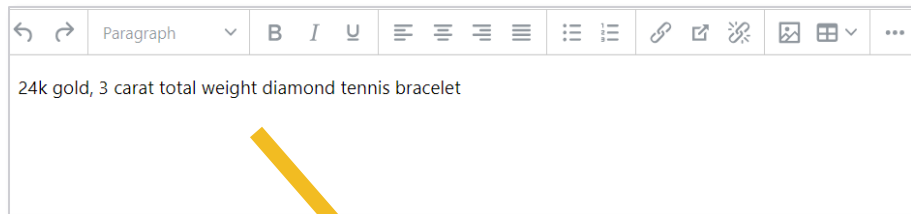
The best way to support is by creating a "Become a Fundraiser" page and share with your friends and family. Other ideas for fundraising: tip jar at local establishment for the month of October, pumpkin carving contest, tailgate donations and corporate matching.

Top Fundraising Ambassador for October will be celebrated! (Only donations to your team fundraising page counts towards your total)

- Shout out on all of our social media channels
- \$50 amazon gift card
- Zoe's Toolbox T-Shirt
- A Zoe's Toolbox to be gifted to a family of your choice or your own child

TIP Description Generators

- Initially built to effortlessly craft auction lot descriptions
- Build draft for:
 - Online Campaign Story
 - Donation Descriptions (Impact Levels)
- Edit copy prior to publishing
- Available throughout the OneCause Fundraising Platform



Online Giving Site

7 Ingredients for a Successful Online Giving Campaign

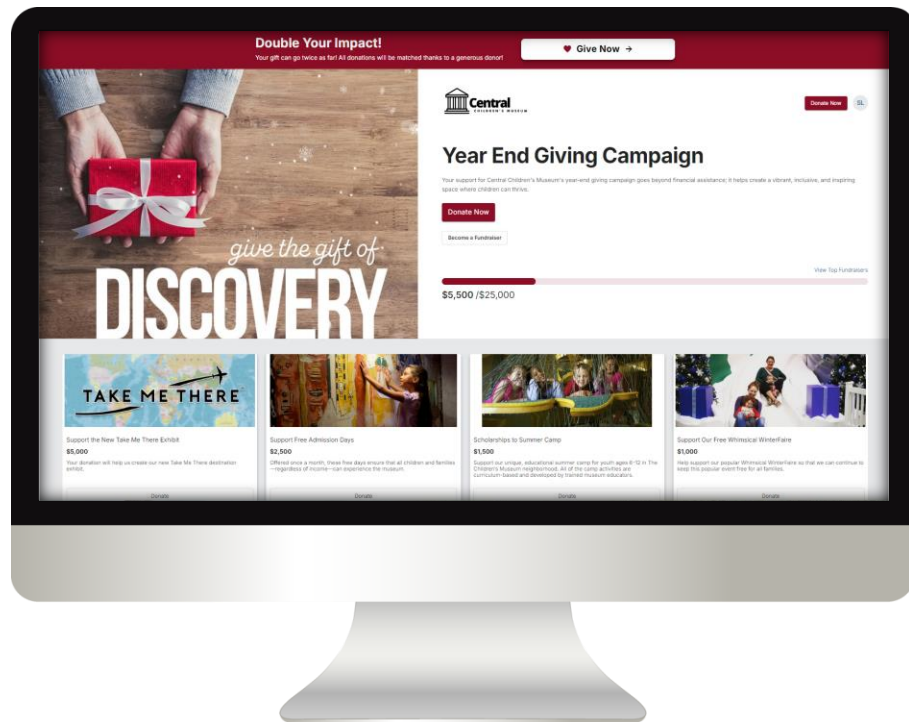
1. Compelling Story
2. Engaging Images



Online Giving Site

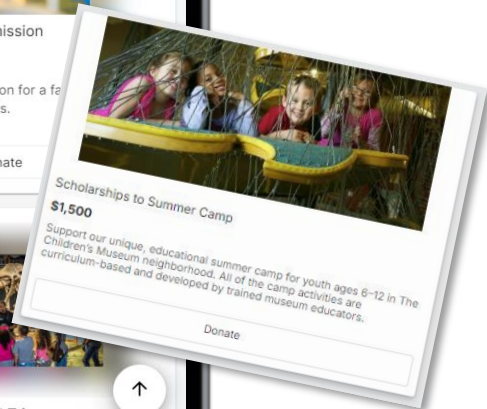
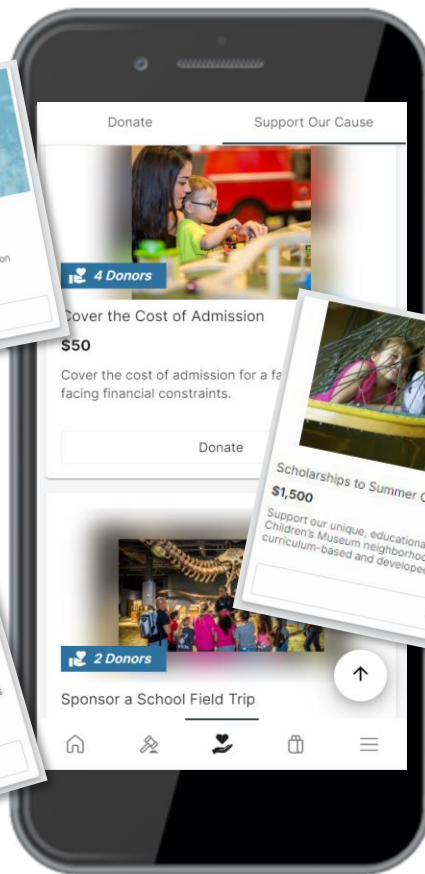
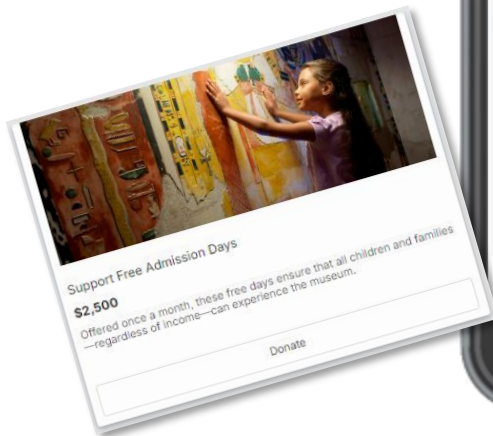
7 Ingredients for a Successful Online Giving Campaign

1. Compelling Story
2. Engaging Images
3. Impact Levels



TIP Impact Levels

- Focus on specific parts of your mission
- Fund programs, projects, basic expenses
- Draft descriptions with OneCause AI™



Online Giving Site

7 Ingredients for a Successful Online Giving Campaign

1. Compelling Story
2. Engaging Images
3. Impact Levels
4. Matching Gifts

The image shows a screenshot of an online giving site interface. At the top right, there is a red banner with a white heart icon and the text: "Double Your Impact! Your gift can go twice as far! All donations will be matched thanks to a generous donor!". Below this, the "Frequency*" section has "One Time" and "Monthly" options. The "Amount" section has buttons for "\$250", "\$50", and "\$25", along with a "Custom" input field. A red "Donate" button is at the bottom right. On the left, a "Donor Recognition" list is shown, featuring three entries: "In Memory of Norma Louise Wagner" (donated by Nate Wagner, matched by Year End Giving Campaign, \$250), "ACME Corporation" (matched by Year End Giving Campaign Match, \$250), and "Jennifer Jackson" (matched by Year End Giving Campaign Match, \$100). A yellow box highlights the "Donated by Nate Wagner" text in the first entry.

Double Your Impact!
Your gift can go twice as far! All donations will be matched thanks to a generous donor!

Frequency*

One Time Monthly

\$250

\$50 \$25

Custom

Donate

Donor Recognition

In Memory of Norma Louise Wagner
Donated by Nate Wagner
Matched by Year End Giving Campaign
\$250

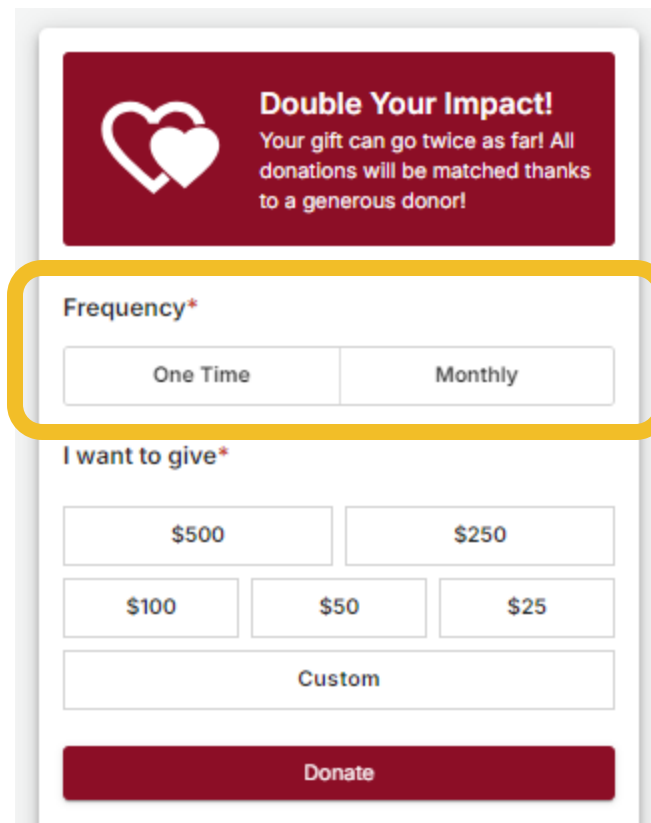
ACME Corporation
Matched by Year End Giving Campaign Match
\$250

Jennifer Jackson
Matched by Year End Giving Campaign Match
\$100

Online Giving Site

7 Ingredients for a Successful Online Giving Campaign

1. Compelling Story
2. Engaging Images
3. Impact Levels
4. Matching Gifts
5. Recurring Giving



Double Your Impact!
Your gift can go twice as far! All donations will be matched thanks to a generous donor!

Frequency*

One Time Monthly

I want to give*

\$500 \$250

\$100 \$50 \$25

Custom

Donate

TIP

Recurring Giving (Supporter-Managed)

- Set giving frequency (weekly, monthly, or annually)
- Configure giving levels
- Opportunity with your existing donors
- Build trust by providing donors control over their own giving
- Make sure to thank recurring donors regularly!

Benton Foundation Recurring Donations

Recurring Donation History

\$120 Monthly Active ✓
Next donation: Feb 26, 2024 | VISA ••• 4021
Initiated on July 2022 from Virtual event A Night In...

Gifts

| | |
|------|-------------------|
| 2024 | \$120 this year |
| 2023 | \$1,440 this year |
| 2022 | \$720 this year |

[Edit Recurring Donation](#)

\$10.40 Monthly Canceled Canceled
Canceled
Initiated on March 2022 from Virtual event Ambassador Fundraising

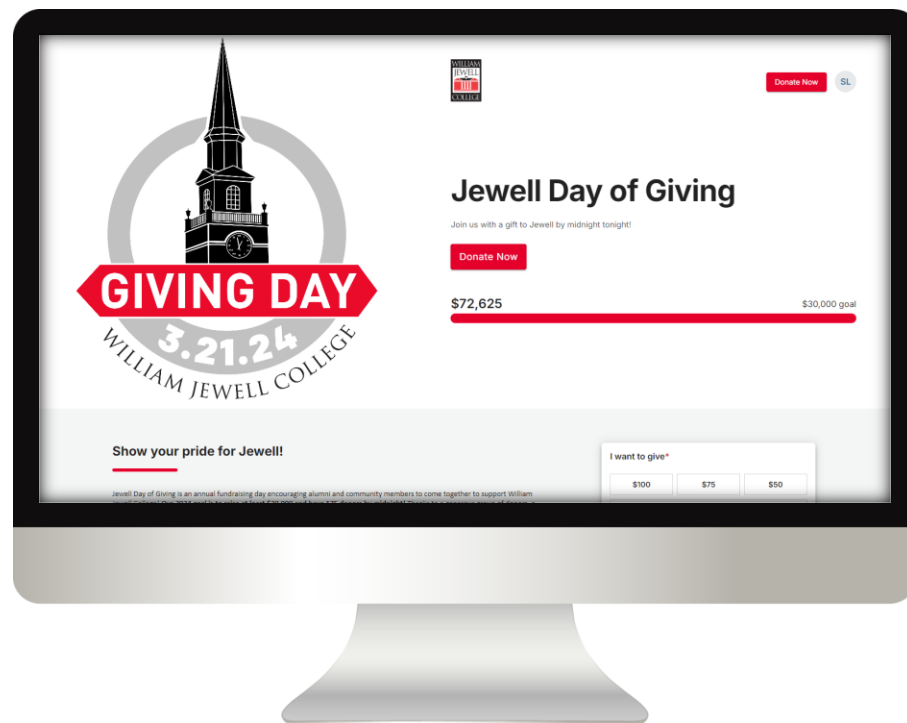
Gifts

| | |
|------|-------------------|
| 2022 | \$83.20 this year |
|------|-------------------|

Online Giving Site

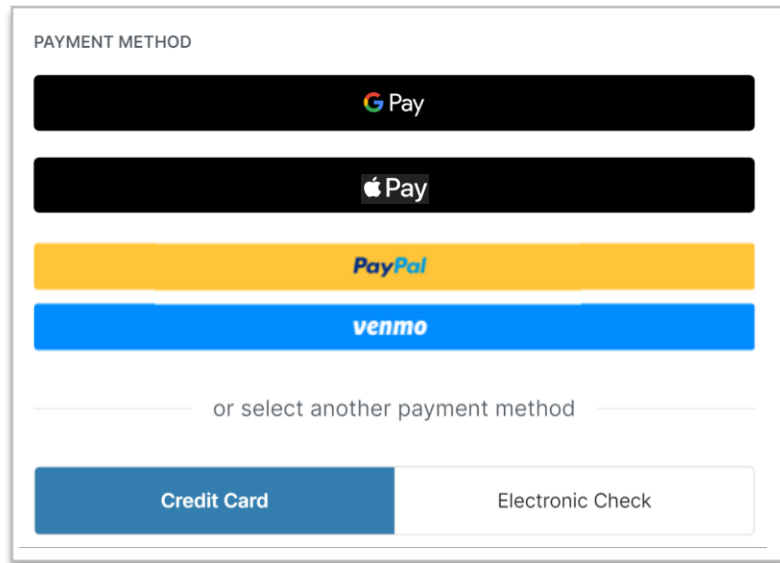
7 Ingredients for a Successful Online Giving Campaign

1. Compelling Story
2. Engaging Images
3. Impact Levels
4. Matching Gifts
5. Recurring Giving
6. Digital Wallet



TIP Digital Wallet

- Increase donation conversion
- Make it faster and easier to donate
- No need to enter card or billing info
- Complete digital wallet:
 - Apple Pay
 - Google Pay
 - PayPal **NEW**
 - Venmo **NEW**
 - Electronic Check (ACH)
- Available throughout the OneCause Fundraising Platform

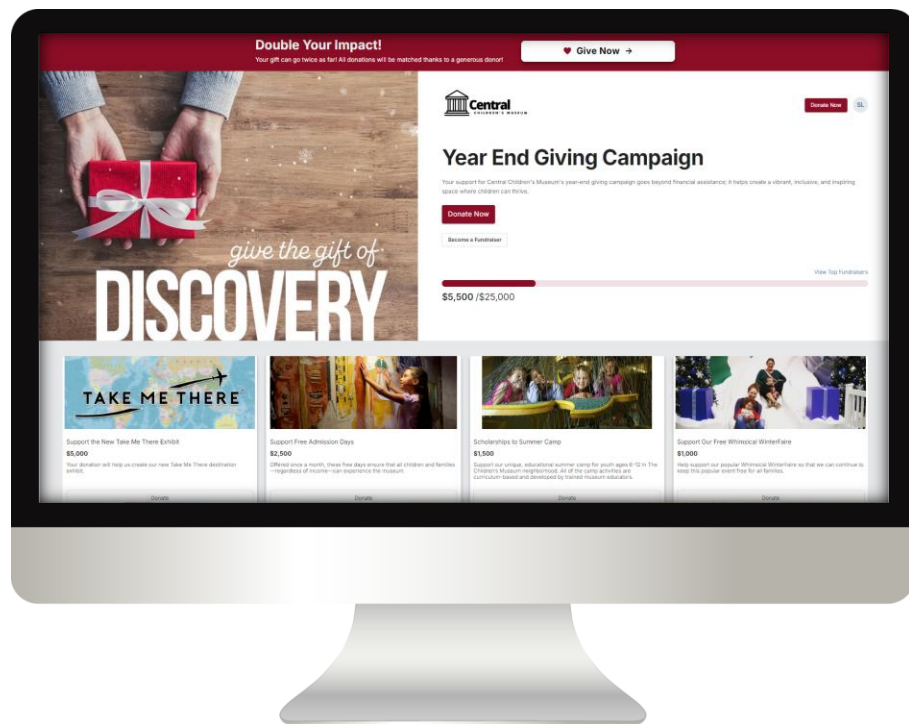


The image shows a 'PAYMENT METHOD' selection screen. It features five main options stacked vertically: Google Pay (black bar with logo), Apple Pay (black bar with logo), PayPal (yellow bar with logo), and Venmo (blue bar with logo). Below these is a separator line with the text 'or select another payment method'. At the bottom, there are two more options: 'Credit Card' (dark blue bar) and 'Electronic Check' (white bar with a thin border).

Online Giving Site

7 Ingredients for a Successful Online Giving Campaign

1. Compelling Story
2. Engaging Images
3. Impact Levels
4. Matching Gifts
5. Digital Wallet
6. Recurring Giving
7. Connected Funds



TIP Connected Funds

- Feature various funds in your campaign
- Engage donors with what interests them
- Available as report & export to CRM
- Can also connect funds to:
 - Events
 - Auctions
 - Tickets
 - Sponsorships

I want to support*

Annual Fund

Carousel Renovation

Donate Using

Google Pay

PayPal

venmo

Credit Card

Fund Selection Question
I want to support

| Connected Funds | | | Connect Fund |
|---------------------|--------------------|-----------------|--------------|
| Fund Name | Donations Credited | Proceeds Raised | |
| Annual Fund | 26 | \$5,260.50 | ⋮ |
| Carousel Renovation | 47 | \$12,973.00 | ⋮ |

Items per page: 5 1 - 2 of 2 < >

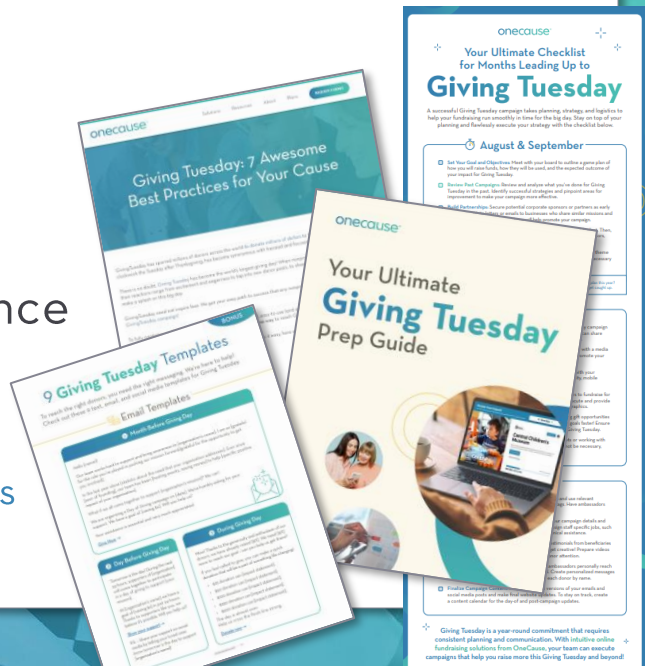


NOT YET
WITH ONECAUSE

TIPS,
IDEAS &
BEST
PRACTICES

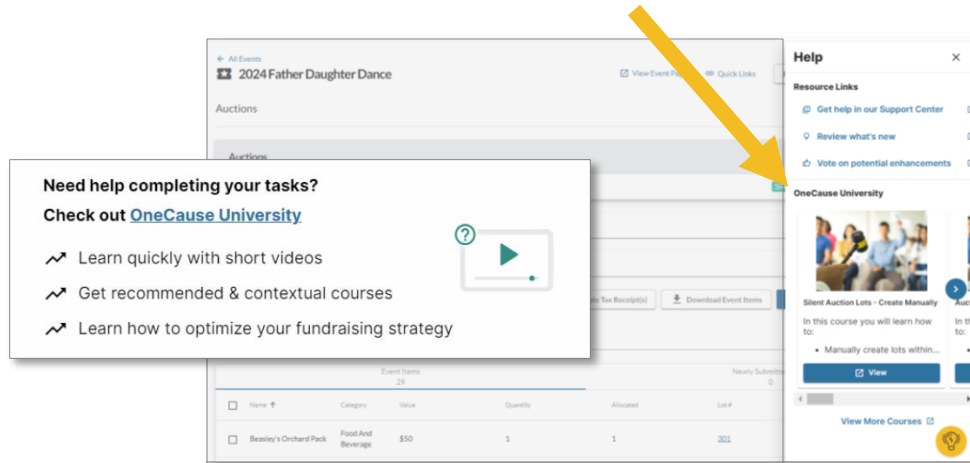
TIP Guides & Templates

- FREE resources & thought leadership:
 - Blogs
 - Checklists
 - eBooks
 - Infographics
- Step-by-step guidance
- Available at onecause.com/resources



TIP OneCause University

- New & improved, shorter, more focused videos
- More relevant, contextualized help



The screenshot shows the OneCause platform interface. A yellow arrow points from the 'Need help completing your tasks?' popup to the 'OneCause University' course card. The popup contains the following text:

Need help completing your tasks?
Check out [OneCause University](#)

- ✓ Learn quickly with short videos
- ✓ Get recommended & contextual courses
- ✓ Learn how to optimize your fundraising strategy

The course card for 'Silent Auction Lots - Create Manually' includes the text: 'In this course you will learn how to: Manually create lots within...'. Below the course card is a table with the following data:

| Name | Category | Value | Quantity | Allocated | Lot # |
|-----------------------|-------------------|-------|----------|-----------|-------|
| Besley's Orchard Park | Food And Beverage | \$50 | 1 | 1 | 301 |



ALREADY

ON PLATFORM

WHAT'S
NEW &
AVAILABLE
TO USE?

FINISHING STRONG

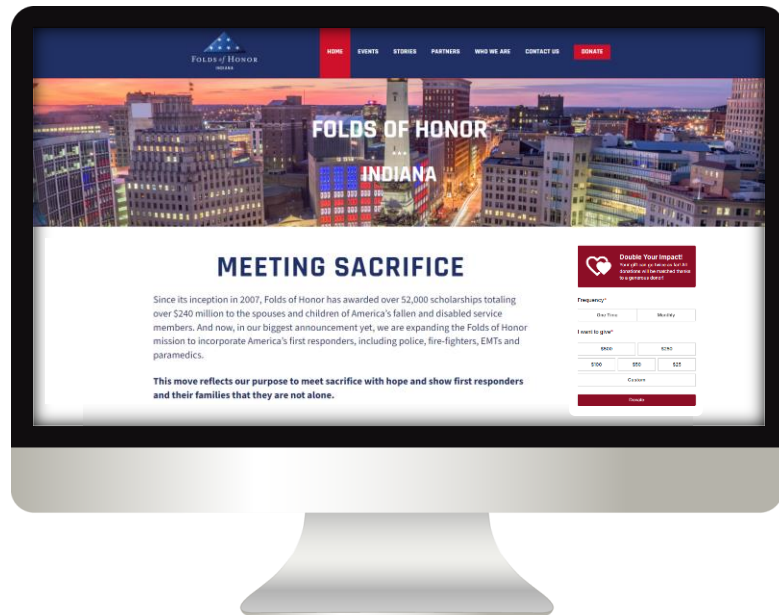
DURING YOUR CAMPAIGN

onecause®

During Your Campaign

Build a Cohesive Multi-Channel Presence

- Website (embedded donation form)



During Your Campaign

Build a Cohesive Multi-Channel Presence

- Website (embeddable donation form)
- Email & Direct Mail (marketing calendar)

American Cancer Society
Every cancer. Every life.*

DONATE

Deadline:
Midnight tonight

Give Now

Unlock \$50,000 Matched Funds

Dear Steve,

Did you know that **more than one in five** people with cancer in the United States struggles to meet at least one basic need?

This finding from our Survivor Survey makes it clear that people with cancer are facing impossible decisions – like whether to put food on the table or pay for the care that could save their lives. The American Cancer Society is dedicated to easing the burden for people with cancer, and we rely on our donors to help us do this lifesaving work. **Today is an especially good time to give: if you're one of the 750 people who pitch in by midnight tonight, your gift will help unlock \$50,000 in match funds from a group of generous donors!**

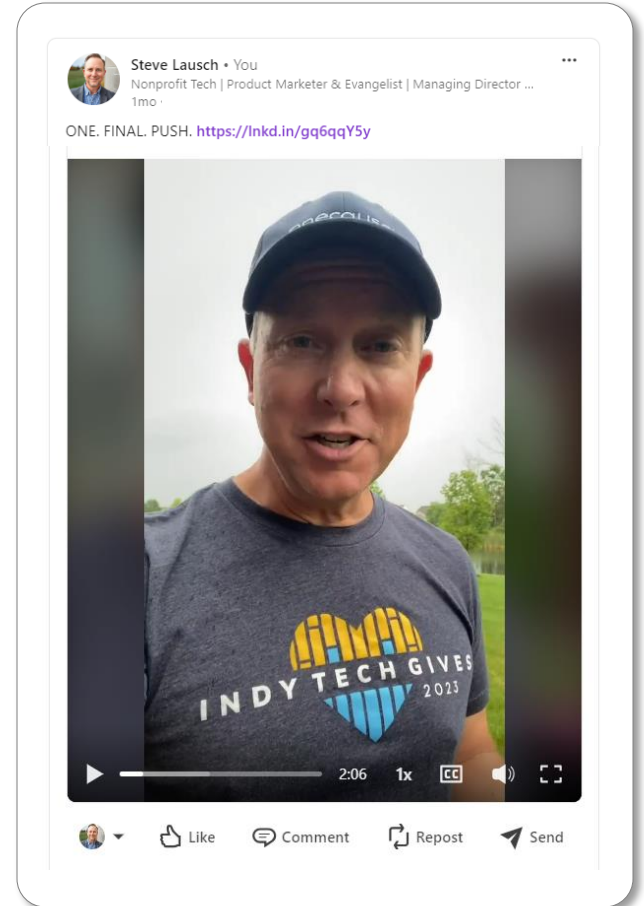
[We are calling on our supporters to step up and ensure that we secure this special match offer – please, make a donation today.](#)

GIVE NOW

During Your Campaign

Build a Cohesive Multi-Channel Presence

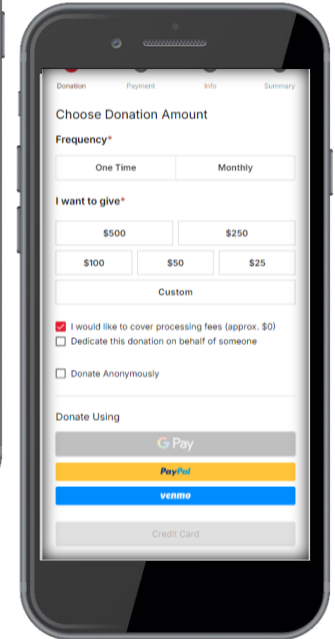
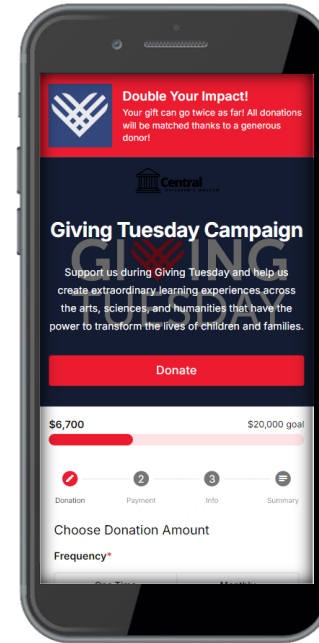
- Website (embeddable donation form)
- Email & Direct Mail (marketing calendar)
- Social Media & Video



During Your Campaign

Build a Cohesive Multi-Channel Presence

- Website (embeddable donation form)
- Email & Direct Mail (marketing calendar)
- Social Media & Video
- Text Marketing



During Your Campaign

Build a Cohesive Multi-Channel Presence

- Website (embeddable donation form)
- Email & Direct Mail (marketing calendar)
- Social Media & Video
- Text Marketing
- In-Person & Ambassadors



Whatever the Medium ...

1

VALUE THE
RELATIONSHIP

2

FEATURE
YOUR “WHY”

3

CONNECT
WITH STORIES

4

CLOSE WITH
A STRONG CTA*

* *Call to action*

SUPERCARGE YOUR FUNDRAISING

TIP Feature at your Fall Event

- Take advantage of a captured audience
- Introduce your year-end giving campaign
- Reveal your online giving site
- Encourage personal fundraising

SUPERCHARGE YOUR FUNDRAISING

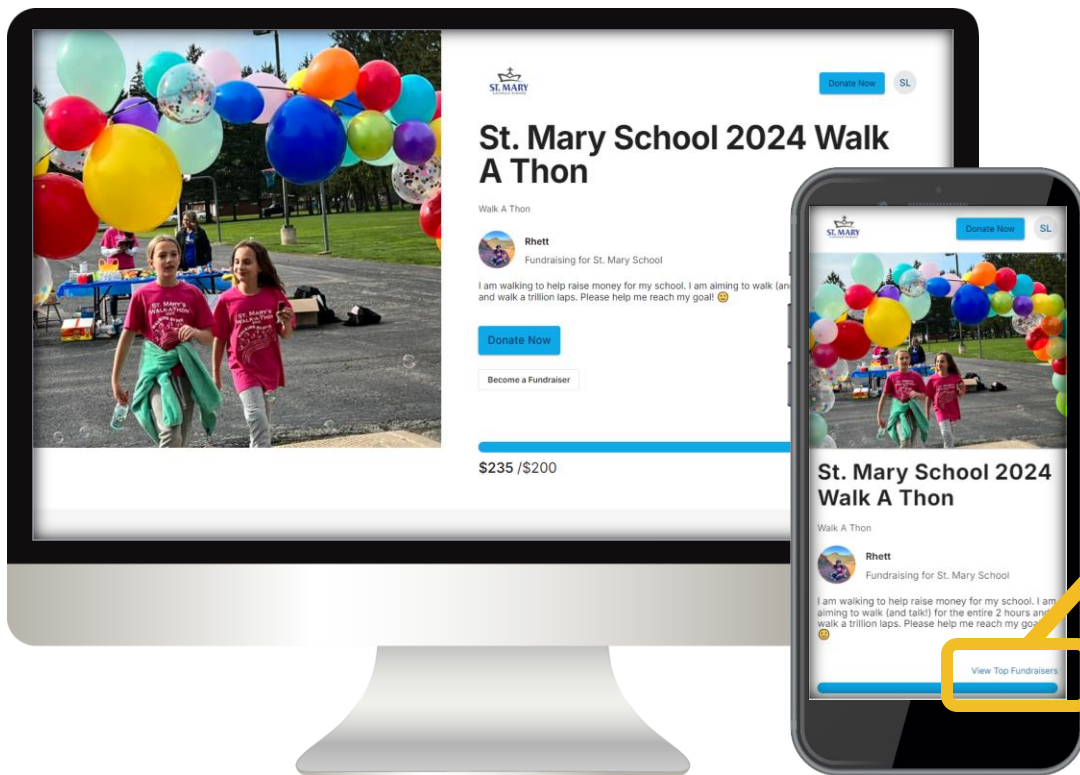
TIP Feature at your Fall Event

- Take advantage of a captured audience
- Introduce your year-end giving campaign
- Reveal your online giving site
- Encourage personal fundraising

TIP Leverage your Ambassadors

- Basic peer-to-peer fundraising
- Supporters can create a page in less than 60 seconds
- Extend the power of fundraising to friends, family & social networks

Personal Fundraising Pages



| Top Fundraisers | | | See All |
|-----------------|--|--|---------|
| 1 | | Julieta Delgado | \$1,950 |
| 2 | | Aly, Amelia, & Avery Ostreko | \$800 |
| 3 | | Paxton Baietti | \$725 |
| 4 | | Carter Sitko | \$700 |
| 5 | | Andy & Gali Garcia | \$655 |
| 6 | | Bennett Family | \$630 |
| 7 | | Juarez Boys | \$510 |
| 8 | | Rico Family | \$500 |
| 9 | | Kaylee & Lorelly Sanchez | \$405 |
| 10 | | Liv & Leah Cooper | \$320 |

FINISHING STRONG

AFTER YOUR CAMPAIGN

onecause®

Reconciliation

- Even easier to balance against your bank account
- Account for giving at the donation & fund levels
- Robust reconciliation dashboard

| Funds | | | | Create Fund |
|----------|-----------------------|----------------------------|-------------|-------------|
| Active | Name | Raised / Goal ↑ | External ID | |
| ✓ Active | Annual Fund 2022-2023 | \$127,879 / \$1,000,000 | B45784412 | ⋮ |
| | Annual Fund 2023-2024 | \$0 / \$1,100,000 | B495687 | ⋮ |
| ✓ Active | Endowment Fund | \$1,255,520 / \$10,000,000 | B4447758 | ⋮ |

1 - 3 of 3 |< < > >|

Credit Card Reconciliation Dashboard

just now

Settlement Date
Last 7 Days

Total Payments

| Settlement Date | Total Amount |
|-----------------|--------------|
| 2023-07-22 | \$30.70 |
| 2023-07-21 | 0 |
| 2023-07-20 | \$5.08 |
| 2023-07-19 | 0 |
| 2023-07-18 | \$11.00 |
| 2023-07-17 | 0 |
| 2023-07-16 | 0 |

Payments by Event

| Name | Total Amount |
|----------------------------|--------------|
| 1 Ambassador Fundraising-- | \$5.08 |
| 2 Benton Academy | \$41.70 |

Payments by Fundrsg Pages

| Name | Total Amount |
|------------|--------------|
| No Results | |

Payments

| Settleme Date | Amount | Payment Type | Ach Reference Number | Check # | Note | Payer Name | Payment Date | Batch ID | Pending | Transaction ID | Transaction Error |
|---------------|---------|--------------|----------------------|---------|------|------------|---------------|----------|---------|----------------|-------------------|
| 1 2023-07-22 | \$12.00 | VISA | 11729305 | | | Joe Duca | 2023-07-21... | 653259 | No | 11729305 | |
| 2 2023-07-22 | \$18.70 | VISA | 11729306 | | | Joe Duca | 2023-07-21... | 653259 | No | 11729306 | |
| 3 2023-07-20 | \$5.08 | VISA | 11725790 | | | Joe Duca | 2023-07-19... | 672302 | No | 11725790 | |
| 4 2023-07-18 | \$11.00 | VISA | 11722355 | | | Joe Duca | 2023-07-17... | 878173 | No | 11722355 | |

Payments by Method

| Payment Method | Total Amount |
|----------------|--------------|
| 1 VISA | \$46.78 |

Payments by Fund

| Fund Name | Total Amount |
|------------|--------------|
| No Results | |

Payments by Proceeds Type

| Type | Total Amount |
|------------|--------------|
| No Results | |

Payments by Settlement Batch

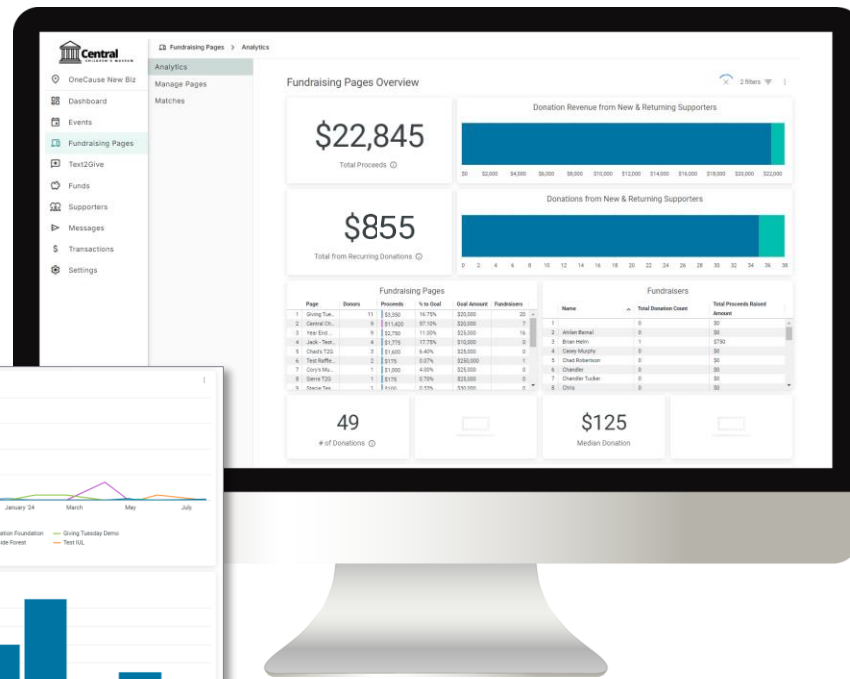
| Batch ID | Total Amount |
|----------|--------------|
| 1 653259 | \$30.70 |
| 2 878173 | \$11.00 |
| 3 672302 | \$5.08 |

Payments by Merch Account

| Merchant Account ID | Total Amount |
|-----------------------------|--------------|
| 1 1839510e-3126-43c-616f... | \$46.78 |

Reporting & Analytics

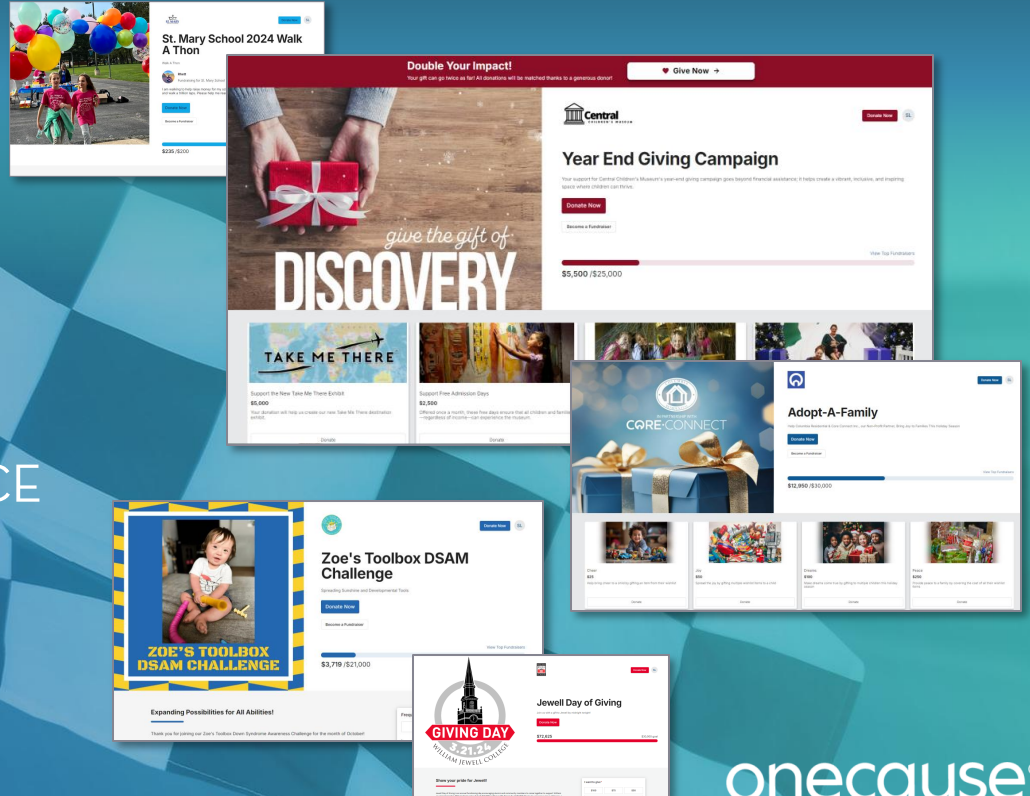
- Updated reports, now with:
 - MORE data available (Supporters & Payments)
 - MORE logical flow of information
- Real-time, actionable Analytics



| Fundraising Page | Amount | Donation Time | Donation Type | Personal Fundraiser Name | Fund Name | Match Distribution | Supporter Type | Company Name | Last Name | First Name | Company Contact | Payment S/P | Paid | Paid By | Covered Cost | Payment Method | Payment Card | Last Payment | Transaction ID | Transaction Status |
|------------------|----------|--------------------|---------------|--------------------------|--------------------------|----------------------|----------------|---------------|-----------|------------|-------------------|-------------|--------------------|--------------|--------------|----------------|--------------|--------------|----------------|--------------------|
| Year End Giving | \$250.00 | 09/19/24 17:08 EDT | Donation | Paul Shriver | Annual Fund | YEG Fundraising Page | Individual | | Smolt | Chase | | Paid | 09/19/23 17:08 EDT | Chase Smc | \$8.75 | VISA | CARD | 1923 | 11831441 | Successful |
| Year End Giving | \$250.00 | 11/01/24 08:20 EDT | Donation | Nate Wagner | Annual Fund | YEG Fundraising Page | Individual | | Wagner | Nate | | Paid | 11/01/23 08:20 EDT | Nathaniel v | \$8.75 | VISA | CARD | 5579 | 11912228 | Successful |
| Year End Giving | \$500.00 | 09/19/24 17:29 EDT | Donation | Irene Sorg | Annual Fund | YEG Fundraising Page | Individual | | Sorg | Irene | | Paid | 09/19/23 17:29 EDT | Irene Sorg | \$0.00 | VISA | CARD | 3298 | 11831494 | Successful |
| Year End Giving | \$500.00 | 09/19/24 16:59 EDT | Donation | Nate Wagner | Carousel Renovation | YEG Fundraising Page | Individual | | Shriver | Paul | | Paid | 09/19/23 16:59 EDT | Paul.Shrive | \$17.50 | VISA | CARD | 1269 | 11831431 | Successful |
| Year End Giving | \$100.00 | 09/19/24 17:19 EDT | Donation | Irene Sorg | Carousel Renovation | YEG Fundraising Page | Individual | | Spade | Samantha | | Paid | 09/19/23 17:19 EDT | Samantha v | \$3.50 | VISA | CARD | 4855 | 11831479 | Successful |
| Year End Giving | \$100.00 | 09/19/24 17:42 EDT | Donation | Olivia Gander | After School Program Sch | YEG Fundraising Page | Individual | | Jackson | Jennifer | | Paid | 09/19/23 17:42 EDT | Jennifer Jac | \$0.00 | VISA | CARD | 5481 | 11831512 | Successful |
| Year End Giving | \$250.00 | 10/02/24 11:14 EDT | Donation | Jenna Meyer | Carousel Renovation | YEG Fundraising Page | Company | AGC Materials | | | Katie Johnson-Boy | Paid | 10/02/23 11:14 EDT | Fake OneC | \$8.75 | VISA | CARD | 2804 | 11854863 | Successful |
| Year End Giving | \$50.00 | 09/19/24 17:32 EDT | Donation | Jenna Meyer | Thursday Night Free Admi | YEG Fundraising Page | Individual | | Gander | Olivia | | Paid | 09/19/23 17:32 EDT | Olivia Ganc | \$1.75 | VISA | CARD | 4486 | 11831497 | Successful |
| Year End Giving | \$750.00 | 09/19/24 17:27 EDT | Donation | Brian Helm | Annual Fund | YEG Fundraising Page | Individual | | Helm | Brian | | Paid | 09/19/23 17:28 EDT | Brian Helm | \$26.25 | VISA | CARD | 6725 | 11831490 | Successful |

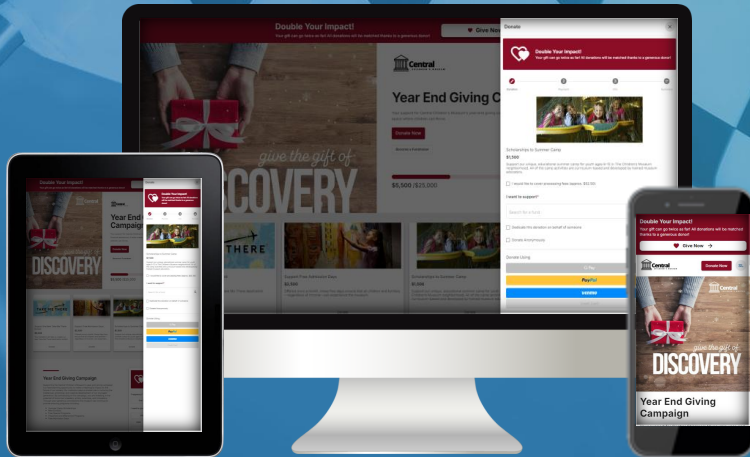
YEAR-END CAMPAIGNS: HOW TO FINISH STRONG IN 2024

- ✓ PLAN EARLY
- ✓ SPECIFY GOALS
- ✓ CONNECT YOUR GOALS WITH TECHNOLOGY
- ✓ BUILD A COHESIVE MULTI-CHANNEL PRESENCE
- ✓ TRACK & IMPROVE
- ✓ TAKE ADVANTAGE OF AVAILABLE RESOURCES



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