give central

GiveCentral
Online Giving

Quick Start Guide

| Checklist for Success

| Extra Help Options

"When we did the GiveCentral campaign, people weren't just increasing by five percent, they were increasing by double. I can get to GiveCentral no matter where I am ... It's been great; I love the interface."

— Rebecca O'Brien, Director of Stewardship

This is your custom guide to successfully implementing online giving for your organization. The sequence is ideal and works very well but feel free to repeat a step, or jump ahead if an activity is timely. The most important thing is to check every step; there's even space to add your own ideas!

Getting Started • Week 1

☐ **1.** Establish goals for online donations: Donors # _____ Giving $ _____

☐ **2.** Request credentials for GiveCentral system administrators.

☐ **3.** Attend Webinar 1: Getting Started – register here.

☐ **4.** Export donor list from existing online recurring giving system for transition to GiveCentral: Donors # _____ (if applicable.)

☐ **5.** Personalize logo, events (fund collections,) GL codes and images in GiveCentral.

☐ **6.** Review Communications Calendar.

☐ **7.** Consolidate parishioner emails for GiveCentral announcement email: #_____

☐ **8.** _____

☐ **9.** _____

Make It Happen • Weeks 2-3

☐ **1.** Send the GiveCentral announcement email.

☐ **2.** Send transition email to existing online recurring donors.

☐ **3.** Update website with 'Donate' button that points to GiveCentral.

☐ **4.** Include GiveCentral in the bulletin.

☐ **5.** Make pulpit announcements.

☐ **6.** Place materials in church (pew cards, flyers, posters, etc.)

☐ **7.** Attend Webinar 2: Make It Happen – register here.

☐ **8.** _____

☐ **9.** _____

Make It Happen • Weeks 4–8

☐ **1.** Introduce GiveCentral to the finance council and have them sign up, ideally via text.

☐ **2.** Train ushers, ministry leaders, etc. how to sign up and donate through GiveCentral.

☐ **3.** Cycle through different GiveCentral ad formats in the bulletin (text, graphic, FAQs.)

☐ **4.** Send a second email introducing GiveCentral.

☐ **5.** Send a reminder email to transitioning donors still on prior online giving platform.

☐ **6.** Set up a personalized giving page for an event, program, or featured collection.

☐ **7.** Attend Webinar 3: Reports & Reconciliation (especially bookkeepers) – [register here](#).

☐ **8.** _____

☐ **9.** _____

Keep It Going • Months 3–12

☐ **1.** Cancel previous online giving platform and confirm it's not billing any longer.

☐ **2.** Send monthly email newsletters and include timely news about GiveCentral.

☐ **3.** Review upcoming activities and events, and utilize GiveCentral's tools to fit (text-to-give, crowd-funding, event ticket sales, personalized giving pages, etc.)

☐ **4.** Monitor the GiveCentral admin dashboard for notifications about new features, product enhancements, case studies for success, blog articles and more.

☐ **5.** Check out your peers' GiveCentral sites; share your successes and challenges.

☐ **6.** _____

☐ **7.** _____

☐ **8.** **Contact our implementation and customer service teams (support@givecentral.org or 312.929.2306) with questions, or to learn more about how our Extra Help options can help you be successful. We have self-serve online resources as well:**

- **[Help Desk and Knowledge Base](#)**
- **[GiveCentral Blog](#)**
- **[How-to Videos](#)**
- **[YouTube Channel](#)**

Our team can provide optional extra help with your GiveCentral roll-out, with guaranteed success. We offer two standard program levels; contact your implementation manager to get started or learn more: support@givecentral.org or 312.929.2306.

Custom Setup & Communications · $1,000

During Quick Start **Getting Started** and through week four of **Make it Happen** GiveCentral staff will:

- ✓ Credential all designated users for admin access to givecentral.org site
- ✓ Configure and personalize your givecentral.org site with banner image, description and contact information
- ✓ Create up to six 'giving' events in your GiveCentral site (typically core fund collections such as Sunday, Christmas, Easter, etc.) with unique images, plus specified GL codes and descriptions if supplied by client
- ✓ Create twelve monthly categories so giving events can be dynamically promoted to donors at designated times
- ✓ Set up a custom text-to-give number with response messages, and supply four keywords and QR code images
- ✓ Configure a personalized giving page for one core event (may be cloned unlimited times)
- ✓ Provide bulletin ads, pew cards, flyers and pulpit script guides customized for your organization (in Spanish as well if needed)
- ✓ Customize email announcement templates with organization images and leadership names

Quick Start Enhanced Support · $4,000

- ✓ Includes all of the **Customized Setup & Communications** support features, extended through the end of the **Make It Happen** phase (12 weeks)
- ✓ Up to three additional personalized giving pages will be created for programs, activities or fundraising events (EX: Faith Formation fees, dinner-dance tickets, building fund pledges)
- ✓ On-site support for up to 15 days

Our Guarantee

An organization that follows the **Quick Start Checklist** timeline supplemented with one of our **Extra Help** programs will by the end of the third full month following roll-out, receive donations processed through GiveCentral to cover the program fee ($1,000 or $4,000) or we will refund the difference.