



Foundation GiveSmart Resources

Maximizing [GiveSmart](#)

The SHRM Foundation is pleased to offer complimentary GiveSmart accounts to all SHRM Chapters and Councils. This page will serve as a resource for everything GiveSmart and to help you maximize giving at events and throughout the year.

- Your GiveSmart Account
 - o [Login to your GiveSmart](#)
 - o Unsure if your chapter or council has already established a GiveSmart Account? Please reach out to the SHRM Foundation Manager of Engagement and Philanthropy, Maddie.schaffer@shrm.org
- How to Set Up A GiveSmart
 - o Please see [Getting Started with GiveSmart](#)
 - o Please see [Creating a New Campaign](#)
 - o Please see [Setting Up Your New Campaign](#)
 - o Please see [Fundraising Ideas](#)
- GiveSmart Best Practices
 - o **Registration During Events:**
 - The quickest way to have someone self-register at an event is by providing the instructions to text the keyword to 76278. You can find your keyword (that you will create) on your dashboard.
 - By texting in, the system will prompt the donor to reply with their first and last name and any additional information you've set to require. This pathway allows the donor to bypass creating a username and password or having to remember that information from a previous account.
 - We advise **not** to use QR codes as this takes the donor into their browser and requires them to sign in with a username and password.
 - Sharing the website URL is great for pre-event, but again, during an event would require the donor to sign in, whereas if they text to register, they will not need to do so.
 - It is important to note that only the website URL or SMS instructions should be shared. An admin should never copy and paste the link in their browser when sharing the site. Helpful info on that here: <https://help.givesmart.com/help/safely-share-your-links>
 - Example: For this site, donors would text the word "Gala2021" to the number 76278.
 - o **Capturing Credit Card Information:**
 - It's recommended to encourage donors to pre-register through the site. By registering, even if the donor doesn't add a card on file to their account, it's

great to still have their contact information so you can send them text messages asking for additional information.

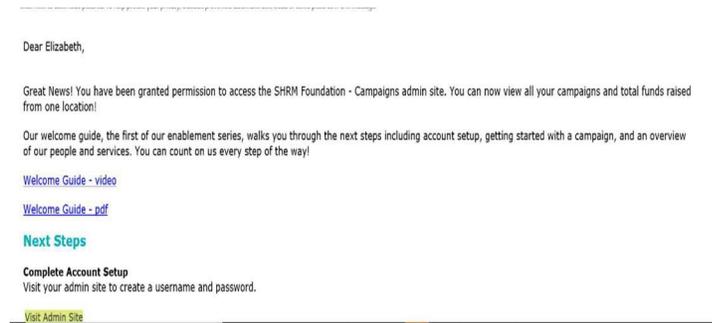
- Consider sending the "prompt for card on file" text message template.
<https://help.givesmart.com/help/manage-a-users-credit-card>
- If a credit card is set to required in the global settings, donors will need to add a card on file before making any purchases/bids.
- **Closing the Silent Auction/Running Outstanding Balances:**
 - A winner's text message **is not** automatically sent out to silent auction winners
 - We recommend scheduling or drafting a silent auction winners text message to go out upon the close. There is a "silent auction winners" text message template.
 - In addition, consider sending the "payment instructions" text message template. This will go to ALL guests who have an outstanding balance, even those who did not win an item.
 - More on text message templates here:
<https://help.givesmart.com/help/templated-preset-text-messages>
 - Credit cards on file are not automatically charged for silent auction items, live auction items, donation items from the donate tab, or any instant, vote or raffle item not set to immediate checkout. You can choose when you would like to bulk run all cards on file, <https://help.givesmart.com/help/settle-remaining-balances>
 - If you are encouraging your donors to cover the credit card processing fee, you may want to consider giving your donors some time to process the payment on their own after sending the payment instructions text message. The option to pass fees (unless set to required in your global settings) is bypassed when bulk running credit cards.
- GiveSmart Additional Links and Articles
 - [GiveSmart Help Center](#)
 - Product Feature Spotlights
 - [Build a Campaign in 60 Seconds](#)
 - [Scheduling text Messages](#)
 - [Freshen Up your Fundraising Ideas](#)

GETTING STARTED?

Step 1: First things, first. Your organization needs access to the system. Send an email to: Maddie.schaffer@shrm.org with a subject header: I want to get started with GiveSmart! Include your first name, last name, email, and cell phone number.

Step 2: We will take care of setting you up in the system with the information you provided. Within 24 hours, you will get an email from SHRM telling you it is done and an email from GiveSmart giving you your login information to start your campaign.

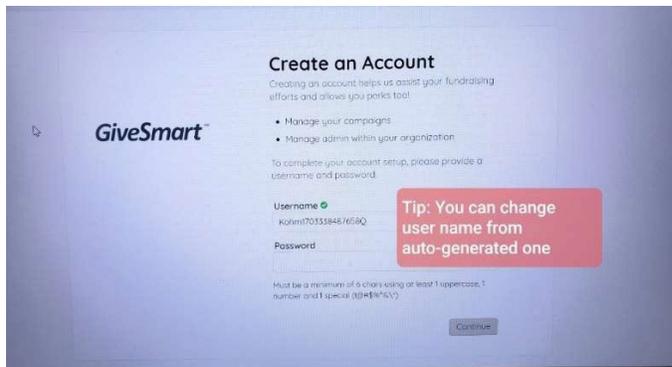
What their email looks like:



Note: You can watch the Welcome Guide video and review the PDF but we have also prepared SHRM specific information for you in this user guide

Step 3: Click on **Visit Admin Site**

Step 4: Create Username and Password



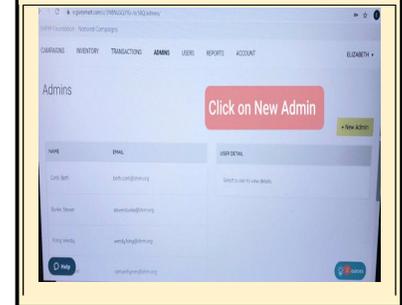
Step 5: Write down your username and password

Troubleshooting Tip
If you do not receive the email, it could have been labeled spam by your IT security. Check in your spam folder for an email labeled: no-reply@givesmart.com

Peer -to-Peer Ideas

Have an intern who is particularly good at IT?

Arizona SHRM State Council did and gave them this opportunity to learn and take project ownership. Give them access or someone else you designate by going to Admin section and adding them.

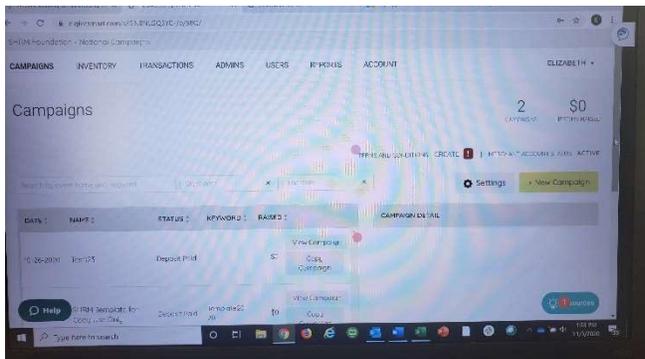


Congratulations, you are now ready to begin using GiveSmart...

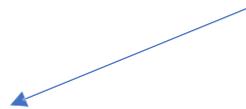
CREATE A CAMPAIGN

Think of a campaign as distinct opportunities or events within a defined time period. You can have as many campaigns as you would like and for different audiences because you decide who you are going to market it to. To set up a new campaign, follow these step-by-step instructions:

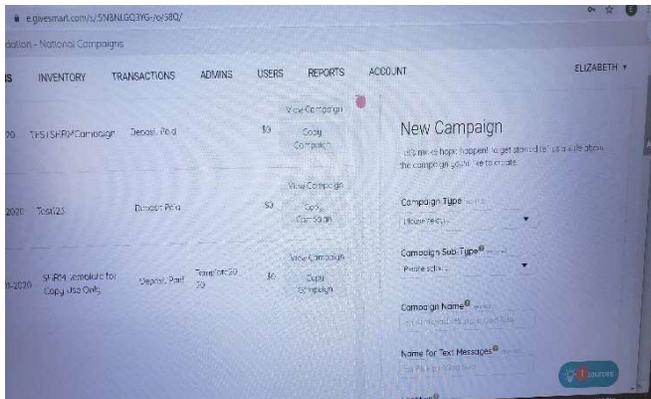
Step 1: Login to GiveSmart.com with your username and password



Step 2: +Click New Campaign

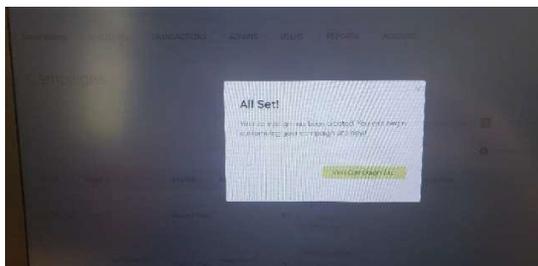


Step 3: A drop-down screen will appear on right hand side for you to populate with campaign info



Troubleshooting Tip
 Before you populate, review Campaign Details on next page for additional information and Best Practices before selections.

Step 4: After you are done with your selections, HIT SAVE. The following screen will appear, and you will also get an autogenerated email notification from no-reply@givesmart.com including the campaign link



Congratulations, your campaign has been created!

When you visit your campaign site, you can now add items, add additional design elements and view admin features.

CAMPAIGN DETAILS, DROP-DOWN SELECTIONS

- **Choose Campaign Type:** Auction; Auction Campaign with Ticketing; Donate only; Ticketing only; Online Auction Campaign

Note: For some of the choices, a drop-down will appear asking you to select a *Campaign Sub-Type* (Gala, Golf, Luncheon, Text-To-Donate, Other)

- **Name Your Campaign:** Recommend it be relatively short and self-explanatory since it will appear in the campaign banner when the page is created

- **Name for Text Messages:** Recommend short, easy text to remember and market more easily

- **Location:** Name of your community

TIP: Choose a small window of time for your campaign to start and end. Increases Interest, Maximum 2-5 days

- **Start Date & Time:**

- **End Date & Time:**

- **Attendees:** Provide maximum #

Note: Depending on the type of campaign you selected, you may have no more selections, just the save option at this point. For some campaigns, there will be additional choices that appear including:

- **Choose Fundraising Opportunities Offered:** Donation Appeal; Live Auction Items; Vote Items; Instant Buy Items (Raffles, Games, Merchandise, Sign-up Parties, Mulligans, Other)

- **Approximate # of Items:** Recommend an optimistic but realistic estimate. This is for the initial design of the page.

- **Ticketing Sales Begin:**

- **Ticketing Sales End:**

- **GiveSmart Staff:** Select NO

STOP: PLEASE DO NOT DO 50-50 RAFFLES DURING THE GIVSMART PILOT PHASE

SUPPORT TIP: IF YOU ARE UNSURE OF SELECTION, click on your best guess or choose don't know if that is an option. On the bottom of every screen, is a RESOURCE button you can click through. You can also reach out to the SHRM Engagement Support Team or the GiveSmart Help Desk.

SETTING UP YOUR NEW CAMPAIGN

First, you need to get to your campaign. You can click through once you have created your new campaign to your campaign page, OR log into givesmart.org and see your campaign listed on your initial landing page and click through there, which will take you to your campaign dashboard.

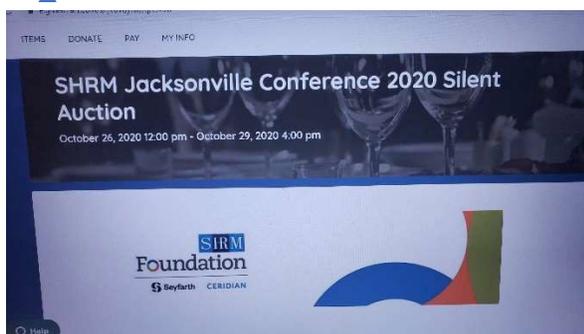
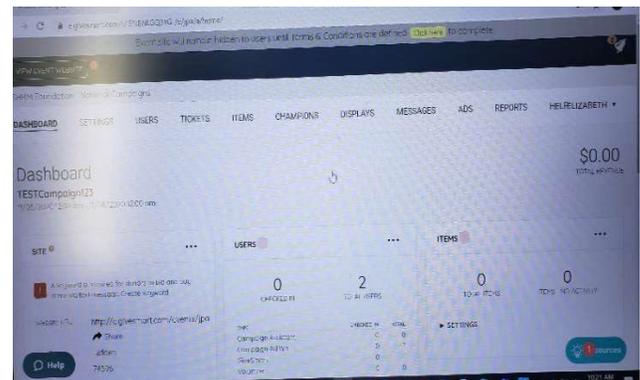
Housekeeping Item: On the top of the page, you will see a gray bar with the words: *Event Site will remain hidden to users until Terms & Conditions are defined. Click here to complete.* Please click through and take care of it for compliance purposes. After you use the back arrow to get back to your dashboard screen

The Dashboard provides a real-time overview of your campaign site with access to settings, tools, and reports.

[Dashboard Overview Video](#)

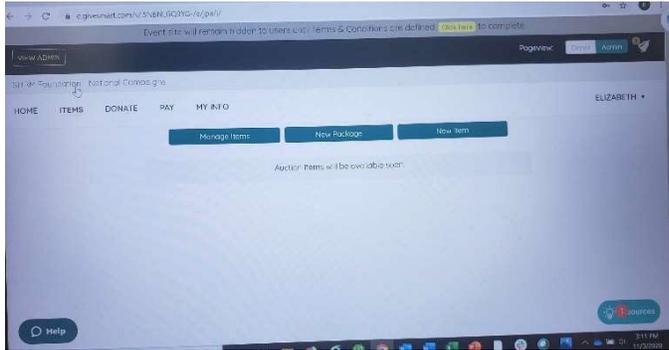
It is your go-to site for set-up, track status, and multiple other features.

Click on View Event Website which will take you to your event landing page. Click items to begin adding items.



ADDING NEW ITEMS

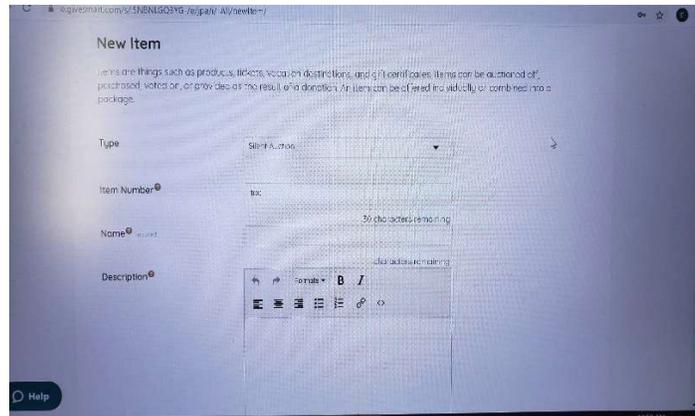
Step 1: Once in items, click on new item.



Step 2: Populate New Item

Troubleshooting Tip
Before you populate, review Campaign Details on next page in its entirety for additional information and Best Practices before selections.

Scroll through the entire screen and click on the small ? if you have questions. It will give you the big picture before you start on the details.



You will need to repeat for every item which seems daunting but after the first few, there is a rhythm and will go quicker than you expect. All items do not have to be added at the same time so you can budget blocks of time as well or as you acquire them.

CONGRATULATIONS!
You have just completed the most time-consuming task on the platform

NEW ITEM DETAILS, DROP -DOWN SELECTIONS



Time Saver Tip: Create a folder with all the items you plan to have in your campaign including any pictures, descriptions before you start this process.

Reminder: Don't be intimidated by the number of drop-downs, not all are necessary for you as a SHRM State Council or Chapter. If you are unsure, leave blank if not required for now or make your best guess. There is the question mark on items you can click through, the bottom of every screen has a RESOURCE button you can click through. You can also reach out to the SHRM Engagement Support Team or the GiveSmart Help Desk.

TYPE

- **Item Number**
- **Name:** Maximum 30 character
- **Description:** Here is where you get to channel your inner marketing genius.
- **Categories:** You can create different groups to organize items
- **Procurement Status:** In hand, pledged
- **Visibility:** Preview; Hidden or Live: Choose Hidden as you are first setting up so you can check your work once for editing etc. Preview will be if you plan on teasing what will be coming or making an item only available on one day.

DONATED BY

- **Type of Donor**
- **User Account**
- **Display on Item:** ex: Marriott

SOLICITOR

- **Type of Solicitor**
- **User Account**

PRICING, COST & VALUE

- **FMV (Fair Market Value) REQUIREMENT FOR SHRM GIVSMART USE**
- **Starting Bid**
- **Bid Increment**
- **Acquisition Cost**
- **Buy Now Price**
- **Surcharge**
- **Item Certificate**

Peer -to-Peer Ideas

SHRM Jacksonville thought about items in terms of shopping or services people cannot do right now. They acquired and organized their items into services or potential holiday gifts to increase interest in their raffle.

INSERT ANY IMAGES & VIDEO

DON'T FORGET TO HIT SAVE ON BOTTOM RIGHT!!

SHRM State Councils and chapters can use the GiveSmart platform alongside their own pivot to virtual events. Here are some ideas and examples to spark your own creativity.



IDEAS

- Many people are looking to find a different way to support their local businesses. Check on donations that can act as promotions for your local hotels, restaurants and stores.
- Promote your auction as holiday shopping and have items that people can envision giving away as gifts.
- Offer your sponsors the opportunity for visibility during the raffle. You can embed them within the raffle, have them on the page or push out in emails and texts.

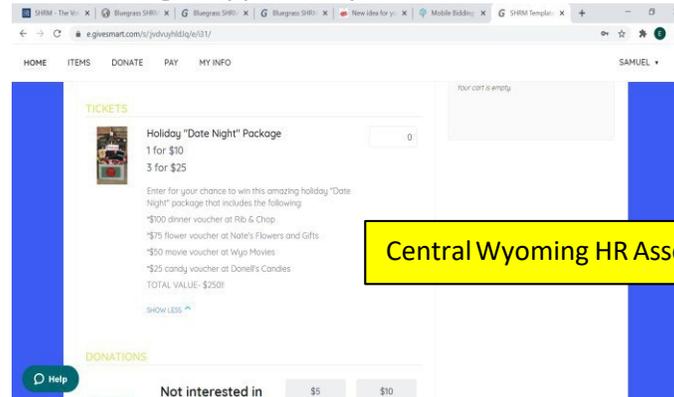
BlueGrass SHRM Auction



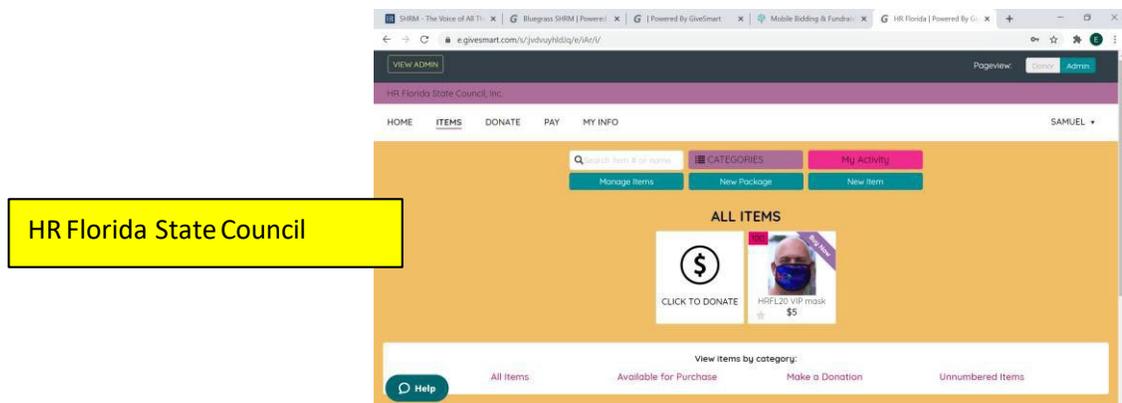
- Everyone is experiencing Covid-fatigue and is a little bored with their current routines. Think about a different experience people could have now or cannot wait to do when it is safe. There will be high interest in those opportunities.
- What other experiences can you auction? What is within driving distance from your community that offers an escape?
- Think about your membership -are there services that someone can donate? Resume review...interview advice for video calls....LinkedIn editing?
- Have a member who is a well-known speaker? Personal coach? Ask them if you could leverage their celebrity status in a raffle.

FUNDRAISING IDEAS

- Create a Surprise Box to drum up interest in gift certificates. Have gift certificates and any discount offerings in every box but in one, have 100.00 bill. People bid on the gift certificates but are also trying to find that surprise.
- Bundle together a Date Night opportunity



- If you are having a virtual event, preview items on your auction but only have them available during the event to drum up interest and friendly time constrained competition.
- Item of high interest slated for your auction? Think about making it a raffle item instead.
- Wine or whiskey pulls are always popular if allowed. Give people the opportunity to be able to pick a bottle of wine or bottle of whiskey in exchange for a ticket. How do you do it virtual? Just use an online randomizer to match person to a designated number.
- Use the GiveSmart site like a STOREFRONT. Sell masks, T-shirts, chapter tote bags.



All fundraising activities should be conducted in accordance with applicable federal, state, and local laws. Consult with your attorneys to ensure you are complying with any applicable state and local laws in relation to these types of events.