

# Roanoke Valley Gives Checklist for Newcomers

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**Did you miss Roanoke Valley Gives 2016 and would like to be a part of the wonderful day of giving in 2017?**

\_\_\_ Determine if your nonprofit is eligible to participate. You MUST answer “yes” to all questions below.

- Is my organization a 501(c)3 nonprofit?
- Is my organization located in the Roanoke Valley (the cities of Roanoke and Salem, the counties of Botetourt, Craig, Franklin and Roanoke)?
- Does my organization serve the Roanoke Valley (the cities of Roanoke and Salem, the counties of Botetourt, Craig, Franklin and Roanoke)?

\_\_\_ **IMPORTANT: Attend the Roanoke Valley Gives Informational Session for Newcomers ONLY scheduled for Friday, December 2, 2016 at 10AM. Space is limited! If you participated in RVG 2016 DO NOT REGISTER for this event.**

**Registration link:**

<https://events.r20.constantcontact.com/register/eventReg?oeidk=a07edha5fq72b65071b&oseq=&c=&ch=>

\_\_\_ Register your nonprofit if you meet all eligibility criteria listed above. In order to participate in Roanoke Valley Gives you MUST [register](#) by February 1, 2017.

\_\_\_ Visit the Roanoke Valley Gives Nonprofit Toolkit (<https://rvgives.givebig.org>) and watch “How to Sign Up with Click & Pledge.” Please note this video was recorded in 2015; however, the steps are the same as described below.

- *Application Sent:* Your application has been forwarded to Click & Pledge and merchant bank TransFirst for review. Transfirst will review the information and confirm your nonprofit status.
- *Sign Agreement :* TransFirst will contact you (Monday - Friday) for any additional information and then send the Merchant Account Agreement to be executed via eSignature. If you do not receive an email from TransFirst in 24 hours, please check your SPAM folder. If no email is received, contact Click & Pledge or Carly Oliver at [carly@foundationforroanokevalley.org](mailto:carly@foundationforroanokevalley.org).
- *Two to Three Business Days:* Once the Merchant Account Agreement has been signed, please allow two to three business days for the merchant account to be approved.

- *Click & Pledge Account Activation:* Click & Pledge will send a "Welcome" email notifying you that your Click & Pledge account is ready to use with instructions on getting started.
- *Roanoke Valley Gives Profile Activation:* Your nonprofit's profile page will be uploaded on the Roanoke Valley Gives website. You will be assigned a unique organization number and will be able to set-up your own user ID and password to customize your page. You will receive notification and instructions on how to customize your profile page including uploading a video, sharing your organization's mission and highlighting the areas of need.

\_\_\_\_ **IMPORTANT: Attend the Roanoke Valley Gives 2017 Kick-off Event scheduled for Thursday, December 8, 2016 at 9:30 AM. Space is limited! This event is for ALL 2017 Roanoke Valley Gives participants.**

Registration link:

<http://events.r20.constantcontact.com/register/event?oeidk=a07edha9bki2eeaca92&llr=utt456cab>

\_\_\_\_ Submit an electronic copy of your organization's MOST RECENT organizational budget to Carly Oliver at [carly@foundationforroanokevalley.org](mailto:carly@foundationforroanokevalley.org) by 4:00 PM on Monday, December 19, 2016. THIS INFORMATION IS REQUIRED TO DETERMINE ELIGIBILITY FOR NEW LEADERBOARD.

\_\_\_\_ Update your organization's Roanoke Valley Gives profile by Wednesday, March 1, 2017. Foundation staff will be scheduling small group training session during the months of January and February. All newcomers are STRONGLY ENCOURAGED to attend this training.

\_\_\_\_ Prepare for an exciting Roanoke Valley Gives Day scheduled for Wednesday, March 15, 2017!

**\*\*\*\*\*IMPORTANT\*\*\*\*\***

**Please note that Foundation staff will do their best to respond to your emails and phone calls in a timely manner. This year we are anticipating over 130 nonprofit participants and strongly encourage everyone to familiarize themselves with the [Roanoke Valley Gives Nonprofit Toolkit](#) and [Nonprofit FAQs](#).**