

Fundraising in 2021: The Tools You Need to Master



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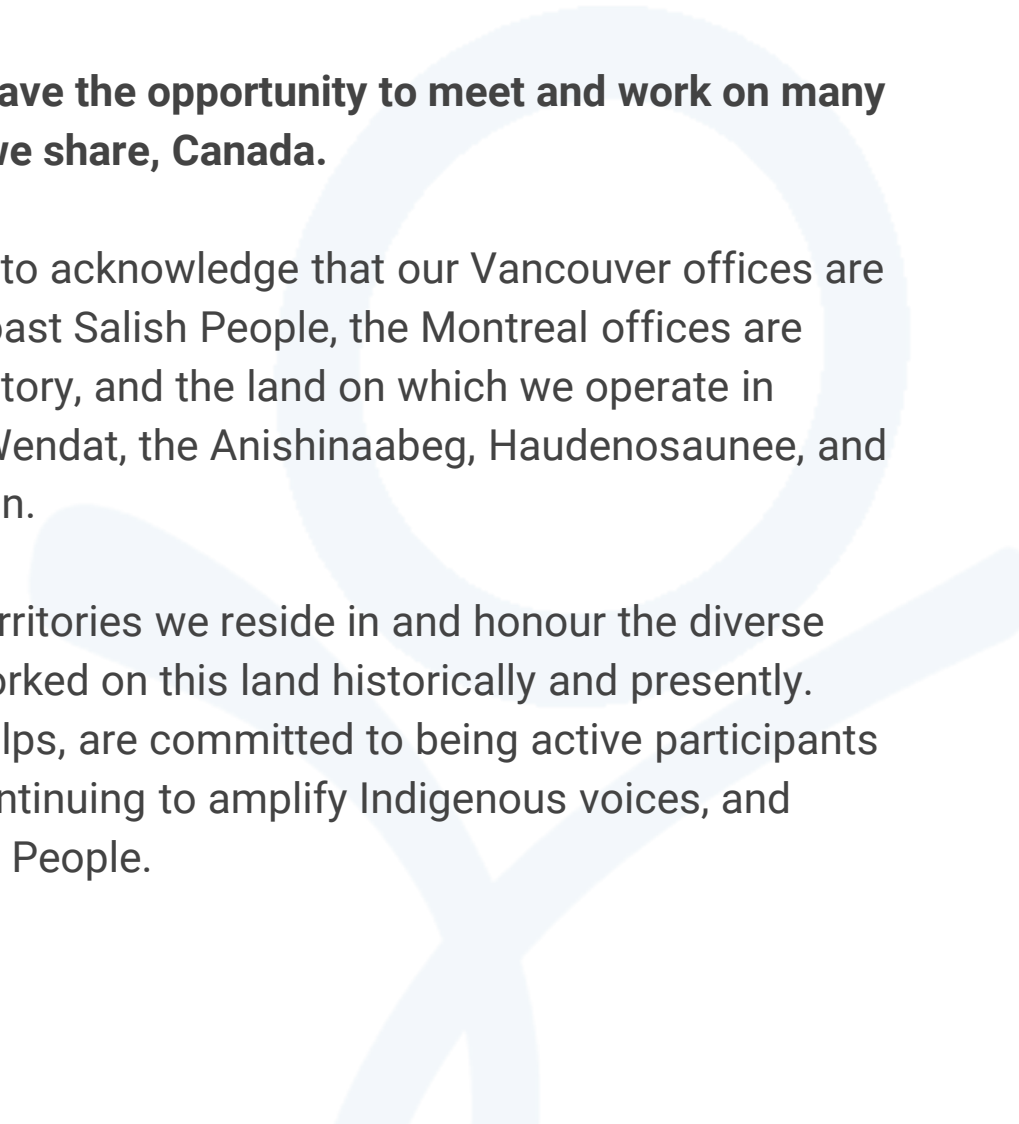


Land Acknowledgement

Our team at CanadaHelps is grateful to have the opportunity to meet and work on many Indigenous homelands across this land we share, Canada.

As settlers on these lands, it is important to acknowledge that our Vancouver offices are located on the unceded territory of the Coast Salish People, the Montreal offices are located on Kanien'kehà:ka (Mohawk) territory, and the land on which we operate in Toronto is the traditional territory of the Wendat, the Anishinaabeg, Haudenosaunee, and the Mississaugas of the Credit First Nation.

We want to express our respect for the territories we reside in and honour the diverse Indigenous People who have lived and worked on this land historically and presently. We, the staff and leadership at CanadaHelps, are committed to being active participants in reconciliation. We are committed to continuing to amplify Indigenous voices, and learning how our work affects Indigenous People.



About CanadaHelps



Vision:

We envision a society in which all Canadians are committed to giving and participating in the charitable sector, and in which all charities, regardless of size, have the capacity to increase their impact.

Mission:

To inform, inspire, and connect donors and charities, and to democratize access to effective technology and education in the charitable sector.

For charities, CanadaHelps builds effective and affordable fundraising technology, and provides free training and education so that all charities, regardless of size, have the capacity to increase their impact and succeed in the digital age.

For Canadians, www.canadahelps.org is a convenient, safe and trusted, one stop destination for donating to (once, monthly, or gifts of securities), fundraising for, or learning about any charity in Canada.

TRUSTED SINCE
2000

\$1.5 BILLION
RAISED

2.6 MILLION
DONORS

23,000 CHARITY
PARTNERS

Agenda

- **Have fun 😊**
- **CanadaHelps 'My Charity Account'**
- **Customizable Donation Forms:**
 - Collect Donations Right on Your Website
- **Peer-to-Peer Social Fundraising:**
 - Turn Your Supporters Into Fundraisers
- **Ticketed Events:**
 - Sell Tickets Right on Your Website
- **Donor Management**
 - Keep all of your donors in one place
 - Issue tax receipts
 - Build custom reports to help you steward your donors

Your CanadaHelps My Charity Account



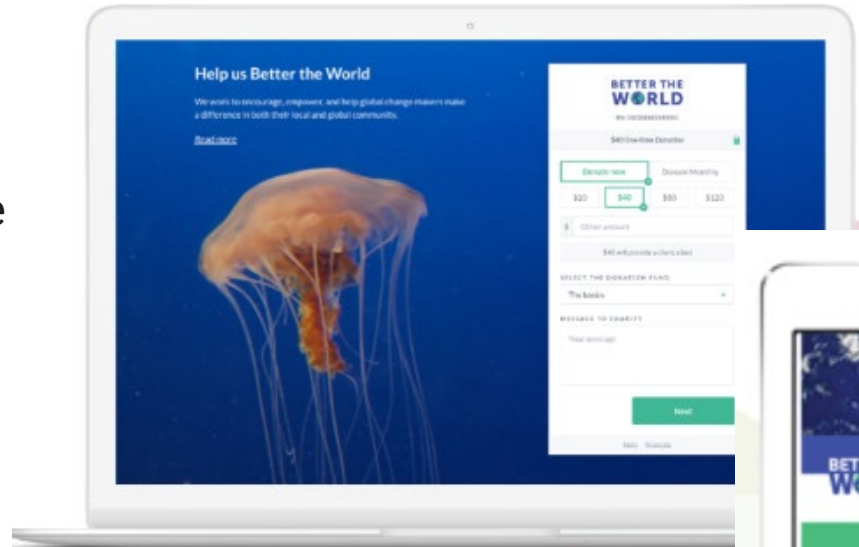
Log on to your My Charity account and take advantage of CanadaHelps' full suite of leading fundraising solutions to reach more donors, maximize donations, and so much more!

The screenshot displays the CanadaHelps.org website interface. At the top left is the CanadaHelps.org logo with the tagline "giving made simple". To the right of the logo are links for "Français", "Help", and a "Giving Basket" icon. Further right is a user profile dropdown menu for "Jane Viernes". Below these are navigation links: "Donate", "Discover", "Fundraise", and "Why CanadaHelps". A secondary navigation bar contains "Home", "Profile", "Donation Forms", "P2P", "Events", "Donation Reports", and "Funds". A dropdown menu is open from the "Jane Viernes" profile, showing options: "My CanadaHelps", "My Charity" (which is circled in yellow), and "Log Out". The main content area is titled "Welcome to Your MyCharity Account" and includes the text: "From online fundraising tools to detailed donation reports, you have many tools at your fingertips to help you succeed. Use the tabs above to navigate your MyCharity account. Below is a breakdown of what you can do in each tab."

Donation Forms for Your Website

Everything You Need:

- Collect donations directly on *your* website
- One-time and Monthly gifts, Tribute giving and Gifts of Securities
- Automatic, branded receipting
- Fully mobile optimized pages
- Extensive customization options
- Google Analytics and Google Tag Manager tracking

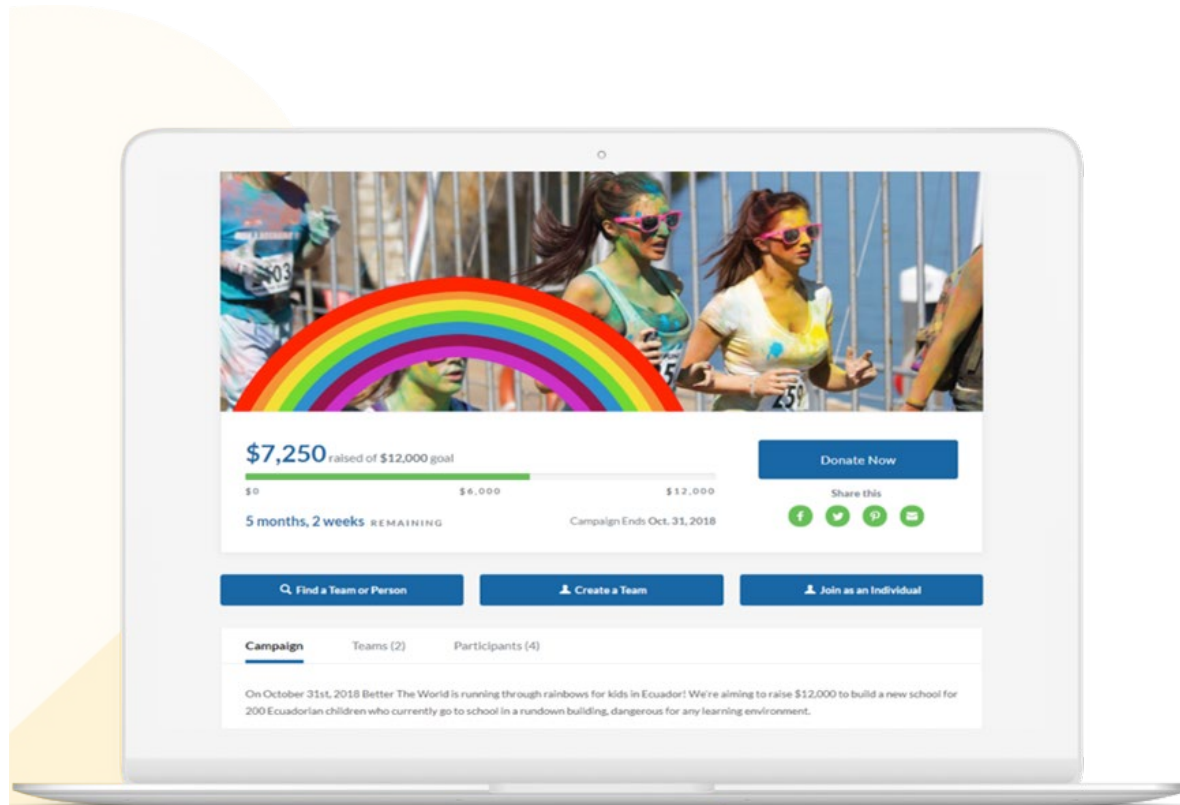


Peer-to-Peer Social Fundraising

Get your donor base excited about fundraising for YOU!

Features include:

- Paid Registration
- Teams and or/ Individuals
- Default fundraising goals, images & stories for your participants
- Control Access: Allow anyone to join, require your approval, by your invite only
- Custom registration questions (waivers & various question types)
- Equip your participants with support documents!
- Bilingual functionality and support



Peer-to-Peer Platform Back-End Look



Peer-to-Peer creation and administration at your fingertips.

Click the 'P2P' tab to see, manage or edit existing fundraisers.

Click the 'Create New P2P Campaign' button and fill out the fields to create your campaign in just minutes.

The screenshot shows the Canada Helps.org website interface. The 'P2P' tab in the navigation bar is circled in yellow. Below it, the 'Create New P2P Campaign' button is also circled in yellow. At the bottom, the 'Your Campaigns' table lists a campaign named 'Virtual Gala 2020' with a progress bar. The 'Manage' and 'Edit' buttons for this campaign are circled in yellow.

P2P Campaigns

Invite supporters to fundraise for your charity. This feature allows you to run "thon" events like runs, and walks or simple online appeals promoted by your supporters. Setup and customize your campaign in minutes then invite and manage fundraising teams and participants, to use the online registration form to start fundraising.

Your Campaigns

NAME ▲	CHANGE START DATE	END	PROGRESS
Virtual Gala 2020	2020-01-20	2020-07-26	\$0.00 of \$10,000.00 goal

Annotations in the image include:

- A yellow circle around the 'P2P' tab in the navigation bar.
- A yellow circle around the 'Create New P2P Campaign' button.
- A yellow circle around the 'Manage' and 'Edit' buttons for the 'Virtual Gala 2020' campaign.

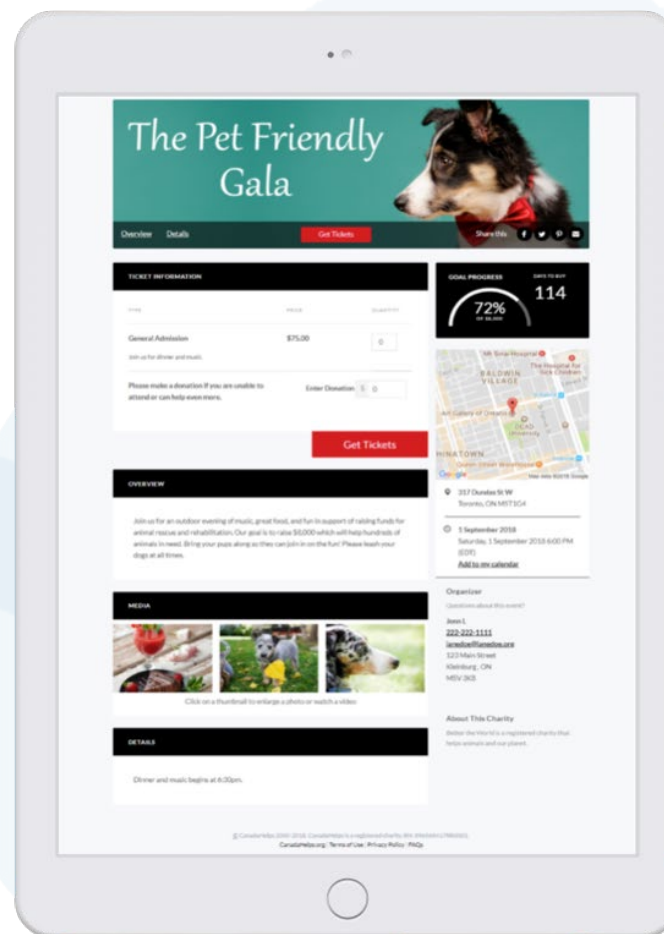
Ticketed Events Platform on Your Website

Run Your Event Your Way:

- Run paid or free events
- Sell multiple ticket types
- Control ticket quantities
- Include a donation ask
- Ask Custom Questions
- Embed your event page right on your mobile-friendly website.

Best eCommerce Practices for Maximum Sales:

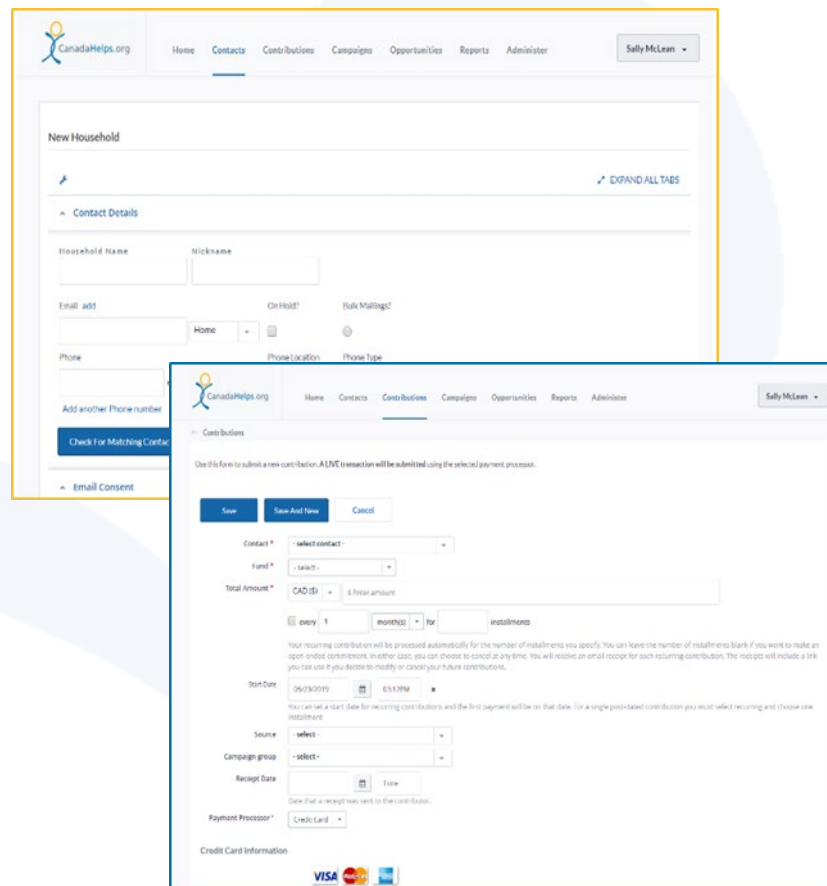
- Fully mobile optimized
- Streamlined purchase path
- All major payment methods
- Automatic ticketing
- Automatic event reminders



Donor Management

Key features:

- ✓ Pulls in data from all CanadaHelps' products (website, Customizable Donation Forms, P2P, and Events)
- ✓ Record offline and in-kind donations, process payments (one-time, monthly), and issue tax receipts
- ✓ Contact and donation management
- ✓ Opportunity tracking, including grant management and large donor/major gift cultivation
- ✓ Fund attribution (for accounting)
- ✓ Built-in email platform with standard and customizable templates
- ✓ Integration with MailChimp
- ✓ Built-in standard reports (based on fundraising best practices)
- ✓ Task management
- ✓ Client Support: online, email, phone, Help Wizard, and video tutorials



The image displays two overlapping screenshots of the CanadaHelps.org web application. The top screenshot shows the 'New Household' form, which includes fields for Household Name, Nickname, Email, Address, Phone, and a 'Check for Matching Contact' button. The bottom screenshot shows the 'Contributions' form, which includes fields for Contact, Fund, Total Amount, Frequency, Start Date, Source, Campaign group, Receipt Date, and Payment Processor. Both forms have a 'Save And New' button and a 'Cancel' button. The interface is clean and modern, with a navigation bar at the top and a sidebar on the left.

Questions or Comments? Get in touch!



Presenters:



Lucas Froese

Eastern Canada Lead,
CanadaHelps

Since 2018, Lucas has empowered over one thousand charities to create sustainable online fundraising strategies. At the forefront of new digital giving developments, he helps organizations build successful online giving programs.



Marko Miketic

Senior Charity Engagement
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Marko supports charities through leveraging effective technology and education in the charitable sector. He strives to increase charitable giving in Canada and to create a ripple of positive impact through his behaviour.



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[Click here](#) to book some time with somebody from our team!

Stay tuned for an invitation to our next
webinar!