# Digital First Steps for Your Small Charity

2025

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# Abstract


The world is digital, but charities are not. This puts the charitable sector, and our communities that rely on them, at risk. This threat is biggest for small charities which makes up the majority of our charitable landscape. The CanadaHelps Digital Skills Survey showed that “55% of charities don’t have funding or skills to leverage digital,” and that “time is the number one barrier”.

This is not breaking news to many working in the charitable sector. It’s clear that many are aware of the importance of moving towards digital but have competing priorities and are unsure of where to start. In fact, the abundance of resources can be overwhelming and make it hard to know what to focus on.

This resource intends to provide first steps; an overview of what is needed to get started, key digital tools and how to make the most of them, a guide to building a digital presence and fundraising online, and a look to the future. This is written with small charities in mind that are reliant on manual processes, managing on legacy software, and limited on time. If this sounds like where you are at with your organization, read on.

If you are beyond these steps, this may not be the resource for you and you can dive in deeper with specific topics through our webinars, Charity Life Blog, or Charity Growth Academy.

CHAPTER 1

# Getting Started with Digital First Steps

# Getting Started with Digital First Steps

Congratulations on taking the first step towards improving the digital capabilities of your charity. In this chapter we will discuss getting into the right mindset and defining the goals and scope of your digital transformation.

## GETTING EVERYONE ON BOARD

Moving towards digital is not an effort that can be shouldered by one person or even one team. Many of us may see digital as someone else's role, but taking ownership of it collectively is where it becomes transformative.

### Establish your digital project team

> Create a digital project team that is **cross-collaborative**, give them **dedicated time** to execute this endeavour and ensure they have the **authority** to get buy-in for implementation.

# Getting Buy-In and Defining Goals

**Get your leadership to buy-in**

> When addressing leadership, be prepared to explain why digital transformation is necessary and outline the consequences of not investing. There is both a time and monetary cost to sticking with status-quo. Sometimes the cost is explicit, with 16% of small charities having reported cybersecurity incidents in recent surveys. At other times, the cost will be implicit in opportunities left on the table and organizational inefficiencies.

**Get your staff to buy-in**

> Organizations with employees that are involved in the digitization process are **1.4x more likely to find success in digital transformation**. A simple way to kick-off conversations is to begin with education on the need for digital transformation and involve staff in brainstorming where digital processes couldbe applied. This has the added benefit of identifying areas that may be overlooked. Digital has the potential to impact every area of your organization, from program delivery to client intake, so getting perspectives from different functions is important to ensure digital is not siloed in one part of your operations.

Moving towards digital is an iterative process. Make sure to regularly solicit feedback from all stakeholders on what is working and what is not. This can take place at a monthly or quarterly cadence.

## DEFINING GOALS AND SCOPE

We've established that you need buy-in. But what are they "buying-in" to? You need a clear vision of what you want to achieve. This involves goals and scope, as well as some expected outcomes and costs that you can speak to.

# Getting Buy-In and Defining Goals

The first step is to take stock of where you are in your digital journey. To approach this, divide your work up into major functional areas:

- **Operations** (core operational system, file management, finance, HR etc.)
- **Fundraising** (donation forms, donor management, tax receipting, grant and funding opportunities, major gifts)
- **Engagement** (email marketing, communications tools, social media, website)
- **Program delivery** (this can vary a lot from charity to charity but could include case management, impact reporting, learning management system)

Look at the main functions in your organization and assess whether the technology stack in each area is fulfilling your needs. Learn from the people most closely tied to the process about their needs and pain points and look into best practice guides to see if you're asking the right questions.

You will undoubtedly find many areas that need improvement. **You may also find that the solution to some of these problems is not technology.**

# Getting Buy-In and Defining Goals

For your core operation system and processs you might ask:

- *What day-to-day functions do you use it for?*
- *Is it well organized? Can each staff find what they need quickly and easily?*
- *Is it sufficiently secure? Are there safeguards that only allow organization users to access them? Does it allow tiered access between a casual worker/volunteer, general staff and outside stakeholders?*
- *Does it have sufficient storage? The CRA recommends keeping records for six years from the end of the last tax year they relate to.*
- *Does it support collaboration? Are staff able to work on things together in real-time, provide comments and suggestions with a recorded history of edits?*
- *Does it integrate with other tools/platforms that you are using/ expecting to use?*
- *Does it have automations that support your work? (What processes are most time consuming for staff?)*
- *Does your staff have any gaps in their knowledge on how to use it and maximize it to its fullest potential?*

When you have the areas in mind, you can identify where to focus based on complexity, duration, cost and impact it will have for your charity.

> In each quarter or fiscal year, you can tackle some “quick wins” alongside one larger, more complex, project. Having quick wins helps you demonstrate to the leadership what is possible and can lead to more investment.

Don’t be afraid to refine scope according to your team’s resources. For example, it may be this quarter’s goal to begin using an operational tool for all files relating to your organization’s programming and uploading all fundraising assets to the tool is currently out of scope. A gradual transition can also allow you to resolve growing pains before rolling it out to a larger group.

# Getting Buy-In and Defining Goals

As you pin down your digital goals, make sure you understand the purpose and how you can fulfill that purpose with a digital solution. There may be several purposes to your digital goal. Each purpose has its own "what/how" that you need from the digital solution.

| Digital Goal | Purpose (why) | What/How? |
|---|---|---|
| Move from a manual process for organization files and assets to a digital solution | Improve efficiency of operations in order to make the most of human resources | Reduce time spent on manual tasks (e.g. simple reporting, data entry, simple program administration) Allow staff to easily self-serve |
| | Allows us to collaborate in real-time to improve problem solving | A platform that allows sharing, commenting and editing from various users while maintaining a history of edits |
| | Ensure sensitive information is securely stored to manage cybersecurity risks | Choose a digital system that offers data-encryption, malware protection and user gated access |

# Formating your Goals to SMART

Once you have established the goals and scope, it's time to get even more specific and make sure they are SMART formatted. You may be familiar with this type of goal setting but as a refresher with some additional context:

**Specific**

What needs to be accomplished and why is it important? This might already be answered in your digital goal.

**Measurable**

How could this be measured? Is it in terms of time save percentage of users on-boarded or time spent in the platform?

**Attainable**

Consider what is feasible in relation to your other priorities and resources.

**Relevant**

Ensure that it aligns with the goals that you've outlined from your needs assessment.

**Timely**

Provide a timeline that you expect to complete it within.

**Put together this could look like:**

> *"Implement a cloud-based office productivity platform across the organization within the next 12 months, resulting in a 25% reduction in time taken for manual tasks like data administration and thank you correspondence."*

This goal setting process is an important step to ensure you are moving the needle towards your stated aims. At times, you may have to adjust your initial goal or way of measuring success, but it is still important to set out with an objective in mind to provide clarity to the team. Documenting the process can help you provide nuanced explanations on your progress.

CHAPTER 2

# Key Digital Tools for Small Charities

# Key Digital Tools for Small Charities

Instead of listing an extensive list of all the tools out there that you could use, this chapter hones in on the key tools for small charities, the ones you're most likely to use no matter what kind of program you are delivering, with a brief explanation onwhat they do, the benefits to using them and how to make the most of them.

Many tools offer a free version for charities or a steep discount, so it could be more budget-friendly than you think. There are also organizations out there like TechSoup Canada that help to connect charities with technology, and that is another great place to start when looking for digital solutions.

### 1. OFFICE PRODUCTIVITY TOOLS

Many types of software fall under this banner, such as word processors, spreadsheets, presentation software, email and calendar applications. You're likely already using some of them! The most accessible and commonplace contenders in this area would be Google Workspace and Microsoft 365, both of which have nonprofit programs for up to 300 users.

Google Workspace emphasizes collaboration and a user-friendly interface with integrations to many other tools. Microsoft 365 has some more sophisticated functions and is best suited to organizations that already work within the Microsoft ecosystem (e.g. Azure, Teams) or have needs that go beyond office productivity such as coding development.

They are quintessential in the modern workplace and allow you to communicate, enhance productivity and collaborate.

# Office Productivity Tools

How to make the most of office productivity tools:

- **Develop an organization protocol:** Take time to structure your file storage and ensure naming conventions are consistent and descriptive. Have everyone keep filed in the appropriate place to prevent knowledge loss with turnover.
- **Create templates:** Encourage consistency and speed up your work by creating templates for your organization. That could include templates for meetings, content briefs, slide decks and project management.
- **Dive deep into the tools that you use:** Put aside an afternoon each week to upskill. Get familiar with the interface and challenge yourself to use it for something you haven't figured out yet. Google and Microsoft have their own learning resources for each tool, Google Workspace Learning Center & Microsoft 365 Training. For example, have you tried creating macros that automate repetitive tasks for you in Google Sheets?
- **Learn about other tools on a surface level:** Did you know that Google Workspace actually comes with 11 applications? Even if you don't plan to use them now, it's handy to know that they have Google Forms that you can use for surveys, or the Gemini AI tool for speeding up your work in a variety of areas.

### 2. CONSTITUENT RELATIONSHIP MANAGEMENT (CRM) DONOR MANAGEMENT SYSTEM (DMS)

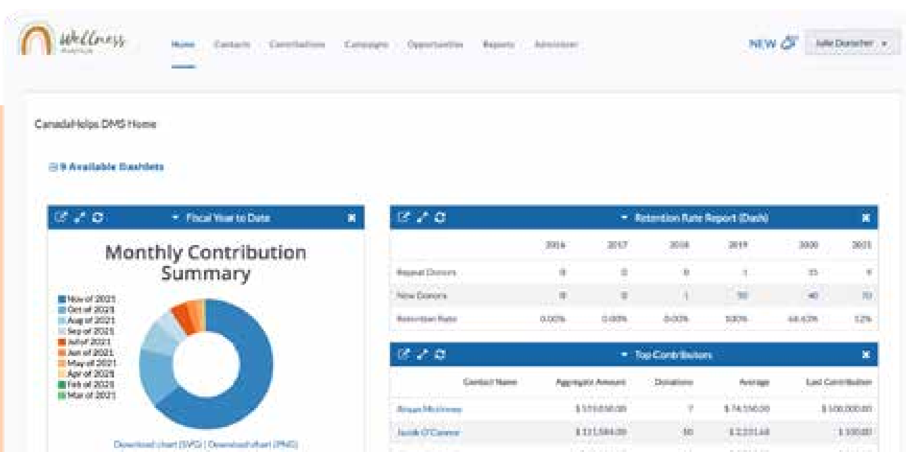
As much as we try to avoid jargon and abbreviations, CRMs and DMSs are unavoidable. They stand for "constituent relationship management" and "donor management system". DMS are a type of CRM but not all CRMs are DMS; DMS is essentially a donation-specific CRM that helps charities to manage the contact information and relationships involved in the donation process.

In all organizations, there are many relationships to manage. Having a CRM/DMS allows you to keep it in one place so that your staff members are working with one source of truth, see at a glance how many contacts you have, and staff can access and self-serve. A DMS is specifically configured to help you manage donations and often has automations so you don't need to copy and paste information between spreadsheets, or manually issue tax receipts and thank you messages. Ultimately, having a CRM/ DMS can help you make more data-driven decisions while building relationships.

# CRM & DMS Systems

**How to get the most out of your CRM/DMS:**

- **Take the time to set up:** Few CRM/DMS are completely "out-of-the-box" because every organization has its own way of using them. Take the time now to put in data validation rules and a limited list of values where it makes sense, ensure the same format is being followed for dates and currency, and that you have the fields to collect the information you need.
- **Keep your data clean:** Remove duplicates, unnecessary or irrelevant data periodically. You may want to review fields that can be archived with your team if they are no longer being used.
- **Provide training and documentation:** Document how your organization uses the database. Even though you may feel it's intuitive, there are nuances in how each organization notates things. Provide simple guides to common processes e.g. updating contact information, and give definitions to any ambiguous fields like "relationship". This could be a living document that is provided to all staff, particularly upon onboarding.
- **Learn what reports to look at:** Data is gold, but only when you can draw insights from it. Learn how to create reports of your key fundraising metrics such as donor retention rate, acquisition rate, average gift size, average frequency and donor lifetime value. These numbers will help you budget and understand whether or not your campaigns are successful.



# Communications & Marketing Tools

Integrate Your Database with Other Tools! Look for integrations with your communications tools, emailing or scheduling platforms so that you can seamlessly use your data in a meaningful way.

### 3. COMMUNICATIONS & MARKETING TOOLS

Even with the critique around email and our crowded inboxes, email remains acritical part of the toolbox for building relationships. Mailing to one large list, copied and pasted from an Excel spreadsheet and BCC'ed is often the starting point for Canada's smallest charities but this method is unscalable and lacking innuance.

- **Build your list:** To make the most of email, you need to have a list. Having an email list is powerful. Unlike other platforms, you own your audience and you can communicate with them unaffected by changes in the algorithm. Start building one today by asking donors if they'd like to stay in contact after a donation or provide a way for people to connect with your charity even if they're not yet ready to make a donation.
- **Segment your list:** What are useful details that can help you divvy up your list into more manageable "segments" and in turn, tailor your communications so they are relevant and timely? In fundraising, this could be targeting your donor list that gave "last year but not this year" often shortened to LYBUNT, but it could also be based on demographic details like "aged between 29-35". Here are some characteristics you may wish to segment by:
    - Demographic details:
        - Age
        - Location
    - How they interact with your charity:
        - Attended your charity event
        - Volunteered
        - Signed up to the mailing list

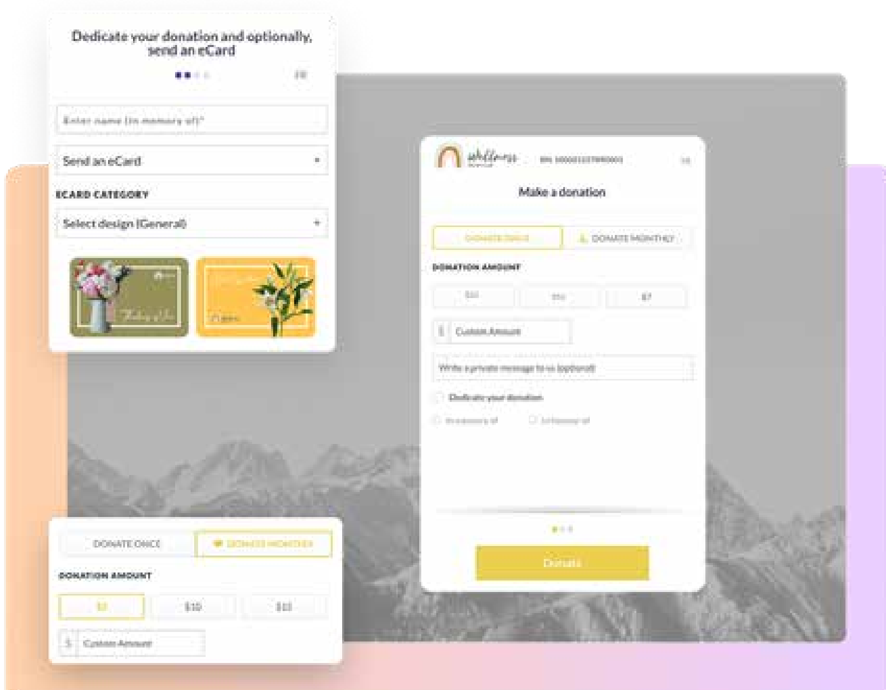
# Online Fundraising Platform

- **Test and analyze:** While we can share anecdotes and statistics, every organization is unique. Once you have lists and segments, you can test out different content and messaging, just make sure you don't test too many things at once and try it with a large enough audience to have confidence in the results. Here are some tests you could try:
    - Send from an individual vs. from your organization
    - Test different levels of personalization e.g. referencing their name or previous interactions
    - Test urgent messaging around time-sensitive campaigns

If you're already doing all of this or looking for some email specific resources, check out [our blog]() for more donor communication tips.

### 4. ONLINE FUNDRAISING PLATFORM

As Canada's largest online platform for donating and fundraising, we would be remiss not to mention a fundraising platform! Online giving has shown significant growth, with online donations through CanadaHelps doubling between 2019 to 2023 and the average one-time donation growing to $226.78 in 2024.

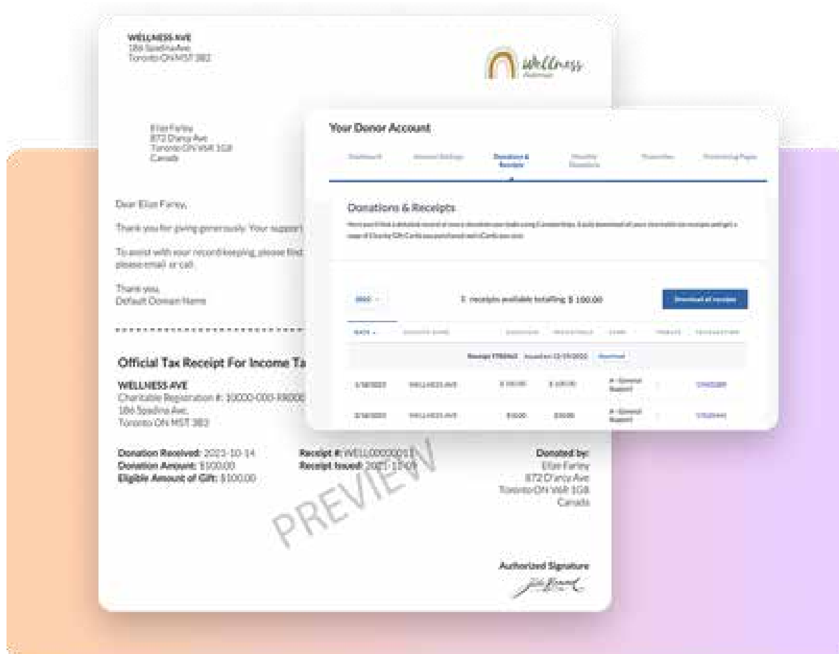


# Online Fundraising Platform

While there will always be a place for offline donations through cash and cheque, diversifying your fundraising is prudent. The best online fundraising tools follow best practices to ensure that donors have a great experience, and decrease the manual work needed for follow-up, while also issuing tax receipts and thank you messages to the donor.

**To make the most of your online fundraising platform:**

- **Embed your donation form:** The beauty of having a donation form is that the donor stays on your website and has a seamless experience within your site. Linking them away from the site or asking them for an EFT can increase the likelihood of them “dropping off.”
- **Diversify your online fundraising:** Make it easy for people to give in memory of, or in honour of with e-Card options. Make it easy for those looking to give securities or give monthly, both rising trends in giving. You can also look at ways to run peer-to-peer or event fundraising through online tools.
- **Set up any automation it offers:** If the platform offers automations such as thank-you messages and tax receipting, ensure that you’ve added branding and messages for your charity where appropriate. This can reinforce your relationship with your donors and confirm for them that they have donated in the right place.



CHAPTER 3

# Building Your Charity's Online Presence

# Building Your Charity’s Online Presence

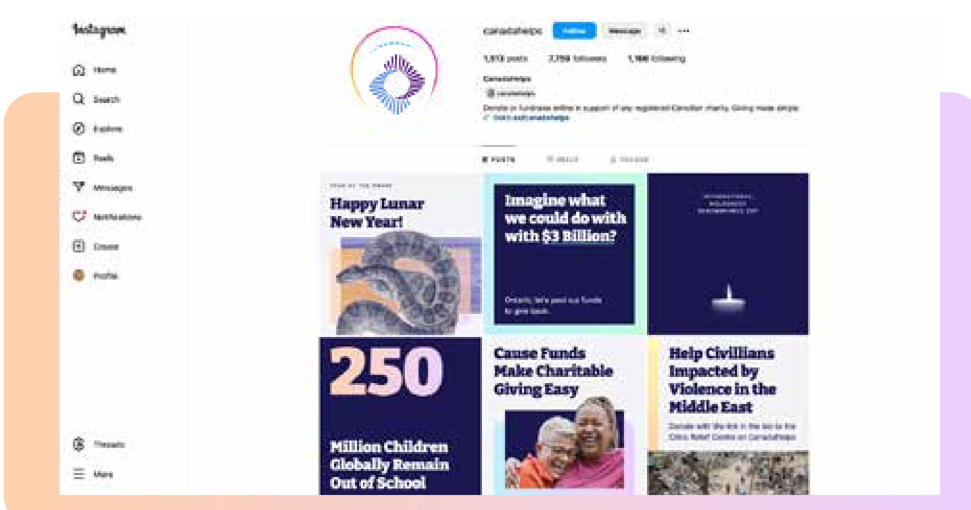
In our Digital Skills Survey, it was clear that small charities prioritized digital presence in their digital transformation, with 27% of small charities ranking this as the most important advantage of using digital technologies. We want to emphasize that digital solutions go well beyond website and social media in providing operational gains to help you deliver your mission. However, we acknowledge that nevertheless building your online presence is an important aspect for Canada’s smallest charities that have not yet established a robust online presence.

## ESTABLISHING YOUR DIGITAL STORY

To build a cohesive and compelling story, circle back to your mission, vision and values to anchor your brand identity; and illustrate your impact on the communities or cause(s) you serve. This will help you establish several key aspects of your digital story:

- **Consistent messaging** (How do you convey your mission, impact etc.?)
- **Recognizable visual identity** (What colours you use and guidelines for other visual assets, photos, and graphics?)
- **Aligned tone and voice** (What is the voice of your charity? Do you want to speak with compassion, professionalism, urgency, or something else?)

Writing this out can help you visualize your digital identity and get everyone on the same page as you develop copy, brand assets and build out your website.



# Building Your Charity's Website

## BUILDING YOUR WEBSITE

With a firm idea of the "digital story" you want to tell, your next step is to build the website. Like the bigger journey of digital transformation, you should establish goals and objectives for your digital presence ahead of time. What is it that you want to achieve by having a website?

Possible Goals/Objectives of your website:

- Establish credibility and trust
- Increase brand awareness
- Acquire supporters and grow fundraising
- Communicate and celebrate accomplishments
- Drive engagement

Your website is the centrepiece or 'storefront' of your digital presence and the first place your audience gains an impression of your organization. Without a well-designed website, it is difficult for charities to gain new supporters, advance your purpose or achieve your goals.

**There are four pillars to a strong website:**

***Navigation and Accessibility***

- *User-friendly design, easy navigation, donate page, seamless donationflow, mobile-responsive pages*

***Content***

- *Informative, relevant, interactive, keyword optimized, search enginefriendly*

***Visual Identity***

- *Photos, fonts, colourway, emblems, logos*

***Calls-to-Action***

- *Guides users to take action*

# Navigation and Accessibility

### 1. NAVIGATION AND ACCESSIBILITY

Help users discover your organization by having intuitive navigation and accessibility. Website navigation and accessibility should not be limited to creating a website friendly for those with disabilities. Digital accessibility and effective website navigation benefit everyone; helping new traffic smoothly locate your donation page, find volunteer submission forms or access information about your programs and campaigns.

Ensure that your website has a cohesive and intuitive structure.

- **Homepage:** This is your central hub and user entry point which should clearly communicate the most important information about your charity.
- **Navigation bar or menu:** Organize the most important actions your users will take in a navigation bar at the top of the page.
- **Pillar pages:** Develop pillar pages covering your main themes that lead to subpages. E.g. a pillar page on “Ways to Give”.
- **Sub-pages:** Subpages branch off from pillar pages into more detailed areas. E.g. subpages to “Donate monthly, donate in honor of, donate securities”.

# Navigation and Accessibility

Some additional design points include:

- **Apply hierarchy to emphasize importance:** What comes first, or is shown in bigger or bold fonts should be based on importance, priority and what actions you want the user to take.
- **Use language that reflects speech patterns:** Don't just avoid jargon, go a step further and use language that reflects speech patterns. For example, instead of "Programs" it could be "How We Help?", instead of "Get Involved" it could be "How You Can Help?" This reduces the mental load needed to process your website.
- **Test your website on different screen sizes:** With many accessing the web through mobile devices, remember to test the mobile and tablet experience of your site.
- **Use colours that provide sufficient contrast:** Important components like the donate button should stand out, but all components should have sufficient contrast to be legible. You can achieve this by using colourways that contrast and double check this with a contrast checker.
- **Keep users on your site:** Avoid leading your users away from your site by providing all the information needed on the page, embed your donation form, and if you need to provide a link, open it in a separate tab.
- **Place the "Donate" button strategically:** The placement of the donate button is important, it should be one-click accessible at all times. The top right-hand side is where we often expect it to be as users use this quadrant of the screen most often.

# Content

## 2. CONTENT

Content encompasses the digital components that tell your brand's story, add depth and provide users with ways to learn about your charity and get engaged. This can start with webpages but can include resources like blogs and ebooks, guides, charts, and interactive pieces like maps, graphs, and petitions.

Content will look quite different from one charity to another but the planning process is the same.

1. Define your goals and audience
2. Develop your core messaging about your mission and impact
3. Create relevant and valuable content

Developing content for your charity may involve a storytelling approach as you show, not tell, your impact in a meaningful way. Storytelling can be combined with facts, numbers and statistics about the cause and how your charity's programs have impacted their life.

**Let's use an example:** Wellness Ave, a fictional charity engaging in mental health and wellness programs for marginalized youth to explore how to create content that captures hearts and drives impact.

**Example:**

*Wellness Ave might share a quote from a youth in high-risk circumstances who has benefitted from participating in a free counselling program. Their story might be interwoven with statistics that highlight social conditions such as the cost-prohibitive pricing of market-rate therapy services for marginalized youth. The benefits of Wellness Ave's program are all showcased in this personal story where the beneficiary overcame depression and anxiety by accessing mental health resources and eventually achieved their dream of attending college.*

# Visuals

### 3. VISUALS

As you build your online presence, integrate visual elements to illustrate your brand and story. While many charities have a decided brand and voice, it can be easy to leave out visual components in the discussion. Ensure you have documentation on the kind of visuals you would like to use on your website whether you're centering the use of photos, people in your images, authenticity or avoiding stock photography.

Visual components:

- Photos, videos and imagery
- Colours Typography
- Logos/emblems
- Emotive designs

**Let's use our example:** How might Wellness Ave use visual components to effectively convey their impact.

**Example:**

*Wellness Ave might use pictures from their youth counselling programs to make the offered service appear lively and dynamic. But they are mindful to select photos that show a diverse range of genders, ethnic backgrounds, family structures and socio-economic circumstances. If all Wellness Ave's images depict youth with single-mother families, it could lead to the assumption that fathers are not actively involved. You may consider using generative AI as a useful tool for visuals that protect the anonymity of your service recipients and deconstruct stereotypes but that is not without* its own concerns.

# Calls To Action (CTAs)

### 4. Calls-to-Action (CTAs)

The fourth and final pillar of building your website involves implementing clear and powerful calls to action, or CTAs, throughout your website. The goal of a CTA is to guide the user through the next stage of their website journey, leading them to take action. Content pieces like blogs and videos should finish with a strong CTA pitch for them to take another action that deepens their relationship with your organization. CTAs should centre on KPIs to keep track of.

Potential CTAs for Your Website:

- Newsletter sign-up
- Petition signatures
- Volunteer submissions
- Resource downloads
- Donate

CHAPTER 4

# Developing Your Digital Fundraising

# Developing Your Digital Fundraising

Online donations are growing at a faster rate than overall giving as more donors – especially younger donors – prefer to engage with causes virtually. Unprecedented events such as COVID have also contributed to funding instability for our sector and underscore why it is prudent to have a diverse fundraising portfolio.

Online fundraising works in tandem with your offline fundraising efforts. Even as you digitize your fundraising, you don't need to put all your eggs in one basket. Certain segments of your audience may still respond better to traditional offline fundraising practices like phone calls, direct mail and in-person events.

Digital fundraising strategy also draws from the same core principles from offline fundraising – building relationships, learning and understanding who your donors are, engaging them and keeping them coming back to give year after year is the *groundwork that will see your organization through*.

# Set up a Donation Form On Your Website

## SET UP A DONATION FORM ON YOUR WEBSITE

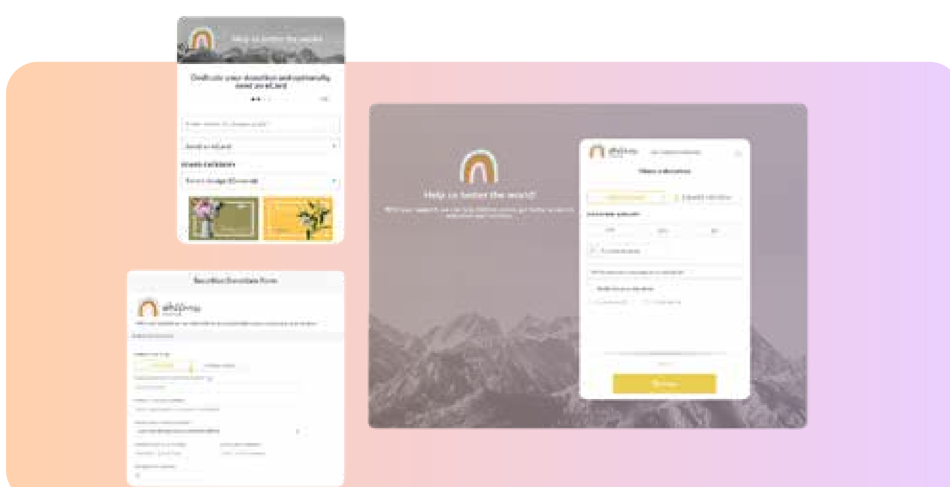
Before exploring the specific fundraising strategies, let's take a step back and begin with setting up a place to donate on your website. As one of your first steps, you will want to have a donation form, such as the CanadaHelps Customizable Donation Forms, on your website to accept online donations.

**Your online giving process should offer donors:**

- Seamless checkout flows
- Suggested donation amounts
- Multiple payment options (Credit, Google Pay, PayPal, gift cards etc.)
- Confirmation page and email after donating
- Donor data in one place

Your goal is to simplify the giving processes as much as possible for donors. Donation processing systems like Interac e-Transfer or linking to a different website create friction and put up unnecessary barriers to giving for the donor. Each time a donor has to open a new browser window, navigate to an alternative site, or go offline and pick up their cheque book you risk losing people by adding these extra steps. Follow digital fundraising best practices, and embed or link your donation form on a dedicated landing page on your website.

Now that you have a place for supporters to donate, **let's delve into digital fundraising channels you can use to start raising funds and growing your impact!**



# Donor Email Communications

## EMAIL COMMUNICATION

Fundraising has always centered on building meaningful and lasting relationships with your donors. One of the primary avenues through which these relationships are established online is through email. A consistent communications plan keeps donors engaged and primed to donate again.

**Core Principles of Donor Communication:**

- Personalized (name, acknowledgement of past gift etc.)
- Consistent (do not reach out only when you are asking for donations)
- Segmented (age, high-value donors, lapsed donors)
- Tailored (to the donors' needs and preferences)
- Thankful and gracious
- Timely

In a world with any number of good causes to give too, your donors have chosen your charity and cause! Your fundraising communications should first and foremost recognize this decision to support you. Ensure your donors are thanked and feel acknowledged – personalized messages that mention their specific donations, attendance at certain events or contribution to campaigns are especially valuable.

To more easily tailor bulk communication for targeted, resonant appeals while reducing your workload, try segmenting your email list by different characteristics or ways they interacted with your charity. For example, the communications you send to your young volunteers list may use more lively and playful wording.

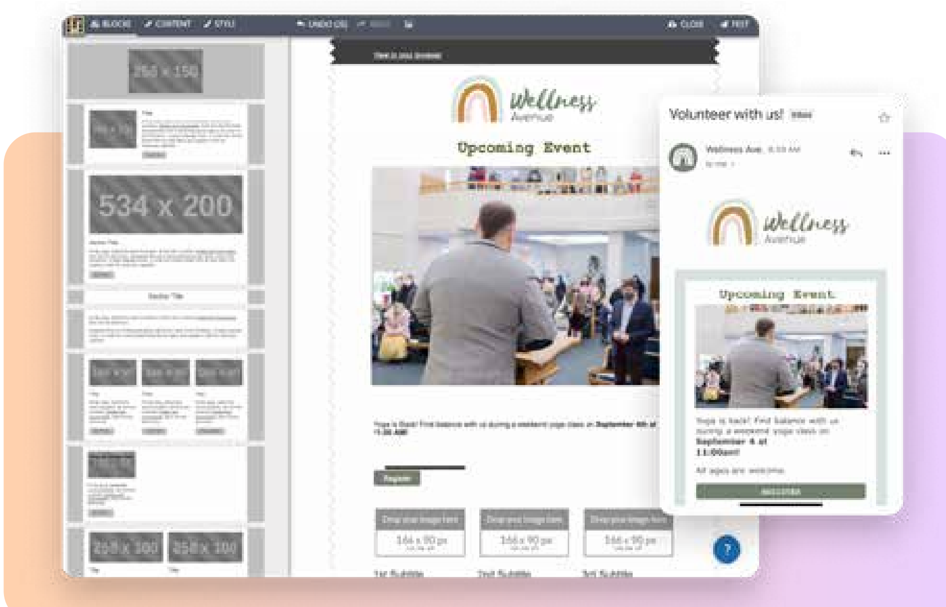
# Donor Email Communications

Have consistent email touchpoints with your donor base, and not only when you are fundraising. Your fundraising strategy should include email communication at some, or all, of the following touch points.

**Email Communication Touchpoints:**

- Thank you within 48 hours of receiving a donation
- Update on their donation the 60 days of the first interaction with a prospective donor
- Quarterly donor engagement email
- Monthly newsletter
- Letter from your Executive Director
- Annual report
- Follow up after other specific actions e.g. attending an event, volunteering
- End of Year and GivingTuesday campaigns

Engage with donors at monthly, or quarterly intervals, and always within the first 48 hours after a donation comes in. Donors that are thanked within 48 hours are 4x more likely to give again. Throughout the year, outline the impact their gift makes and reinforce the importance of their generosity to fulfilling your organization's cause and mission.



# Peer-to-peer Fundraisers

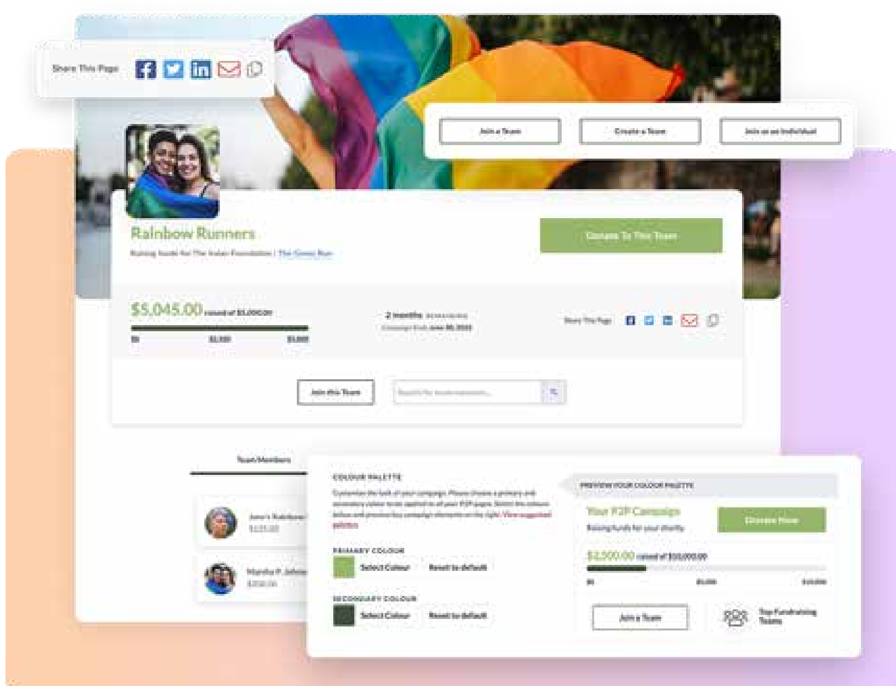
## PEER-TO-PEER

Peer-to-peer (P2P) is a powerful digital fundraising strategy where individual supporters raise money on behalf of a charity through leveraging their personal networks of friends, family or colleagues. Often, there is a specific fundraising goal they are trying to reach or surpass. P2P is powerful as it gives the charity a personal testimonial on behalf of the fundraiser, similar to how 'word of mouth' operates.

P2P campaigns can be unique, or tied to specific events or dates in the year – runs,walk-a-thons, birthday fundraisers etc. P2P campaigns are often shared on the individuals' social platforms or via email networks to maximize visibility and engagement – consider friends who have shared GoFundMe campaigns with you to gain an understanding of how effective P2P can be.

Individuals who run a P2P fundraising campaign for your organization are some ofyour most valuable and engaged donors, ensure you have a process to recognize their contribution.

If you'd like to learn more about running a successful P2P campaign, you can check out this guide on [Launching Your First P2P Social Fundraising Event](#).



# Virtual Events

## VIRTUAL EVENTS

Virtual events are an important component of a robust digital fundraising strategy. By hosting online events, charities can offer value to donors, interact with their audience in real-time, increase brand awareness, and make a compelling personal pitch for donations.

**Benefits of online events fundraising:**

1. Showing the people behind the work to donors
2. Reach many donors at once
3. Engage with donors in real-time

**Online Event Ideas for Charities:**

- Galas or auctions
- Classes or workshops
- Performances or movie premiers
- Interview or Q&A sessions with special guests
- Virtual challenges
- Major updates on organizational changes or developments (Meet the new Executive Director, project completed etc.)

Ensure you consider opportunities for engagement and interaction during digital events such as Q&A sessions, live polls, discussions and chat moderation and don't over look the fundraising pitch.

# Virtual Events

During the beginning, middle and end of your event, take the opportunity to ask your audience directly for donations and consider:

- Offering multiple payment options for donating (credit card, Apple Pay, address for mailing a cheque etc).
- Putting the link to donate in the live chat throughout the duration of the event
- Following up after the event with a thank-you messages that includes a link to donate

Check out more ideas in our blog post 7 Ideas for Virtual Charity Fundraising Events and check out our Events management tool that works for both online and offline events.

BONUS

# A Look To The Future

# A Look To The Future

It is impossible to predict what will happen in the future but it is possible to future-proof your charity through cultural change that will prepare your organization and your employees to become more adaptable to any technological change.

**Foster a Continuous Learning Culture**

*Recognize and encourage staff that are already investing in themselves to learn and try new things. This could look like rewarding their efforts and noticing when they've applied learnings to their work. A more formal top-down could involve training people managers to nurture those on their team and co-develop plans for growth and development for each team member.*

**Budget For Learning Resources**

*A budget for professional development shows your organization's commitment to learning. Even a modest budget of $500 can allow your staff to participate in conferences, workshops and online courses that build long-term capacity. You could also explore partnerships with online eLearning platforms with relevant content to the work that you do.*

# A Look To The Future

**Encourage Knowledge-Sharing**

*Go a step further and learn from each other by promoting a knowledge-sharing culture. It can start with small actions like forwarding an interesting email, webinar or blog post. To build on top of everyday actions, you can foster knowledge-sharing through more facilitated efforts like curating a library of the resources, incorporating time into team meetings or dedicated sessions.*

**Give Everyone the Gift of Time**

*All of this takes time to do; learning takes focus! If it is possible, block off a day or just an afternoon each week for special projects and learning organization-wide. Even though you can fit in learning at any time, having dedicated time makes it an official commitment and ensures it's prioritized alongside other tasks.*

**Look for support from your trusted charity partners at CanadaHelps**

*Working with charities, we understand many of the unique pain points charities are facing at this juncture and as they look to the future. We are building something to help solve this. This purpose-built solution for charities will offer a holistic digital system to run your charity and resolve the issues that a rise from manual processes and legacy tools. As we continue to build this out, we invite you to become one of our early adopters and help guide what we build while benefiting from its current functions.*

Future-proofing and digital transformation is not about choosing any one technological solution to resolve the issues with manual processes but having a culture that helps your team stay resilient and thrive with any digital change. With the right mindset and strategies, organizations can turn uncertainty into opportunities and emerge as leaders in the charitable sector.

# We're building something to help charities get digital

**Offering you all the digital systems needed to run your organization.**

- No more disjointed systems requiring specialized skills to integrate
- No knowledge loss with staff turn over
- No more importing data from one system to another
- No more trying to run an organization from spreadsheets, legacy tools, and paper documents

**An opportunity to use and test the first set of features.**

- **First look:** Early access to current and future feature releases
- **Influence and shape:** Help shape functionality and directly influence improvements via your valuable input
- **Flexible engagement:** You don't need to set aside a lot of time. We're talking 5-10 minutes followed by however much usage you want after that

**What you'll have access to, to use and test.**

- Contact and donation management
- Offline tax receipting
- Data import utility

# Contact and Donation Management

- Add and manage individual, organization, and household contacts
- Add and update notes, plus keep track of communication opt-outs
- Add individuals to households to keep track of giving history across households
- Funds and campaigns synced with your Canadahelps donation forms
- Full contact donation history with quick snapshot summary details
- Add in honour/memory of notes to donations

# Offline Tax Receipting

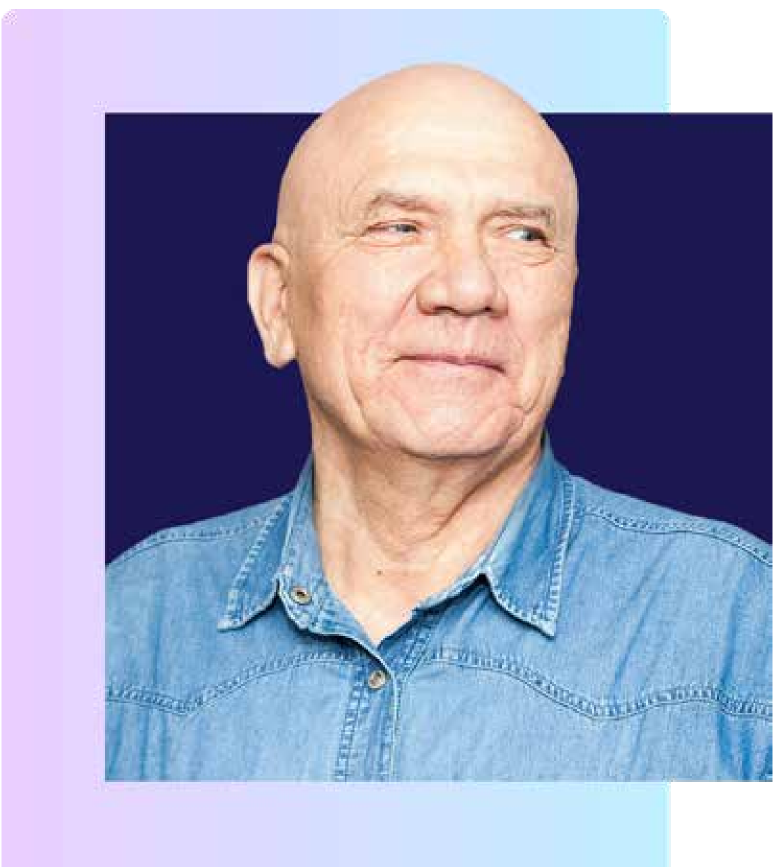
- Issue CRA compliant tax receipts for individual donations
- Manage tax receipts; resend receipts, void issued receipts and re-issue replacement receipts
- Send tax receipts to donors via email or download for print
- Bulk and aggregate tax receipting

# Import Data

- Streamline data management by easily importing contact and donation information, saving hours of manual data entry time
- Quickly scale your donor database by importing large volumes of contact information
- Facilitate smoother transitions during organizational changes or mergers by easily in corporating external datasets

## Speak to one of our Charity Engagement Specialists today:

Book a Time



**For more information, visit:**
canadahelps.org
info@canadahelps.org
1.877.755.1595

30 Adelaide St E.
12th Floor
Toronto, ON M5C 3G8