How to Use Donor Data to Supercharge Your Year-End Campaign

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Canada
Helps.org
giving made simple

Land Acknowledgment

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.

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

- **What is Data & Why should we collect it?**

- **Setting up to collect the right Data**

- **Extracting your Data**

- **Donor Management**

- **Questions & Answers**

So what do we mean when we say data?

Demographic Data

- Age
- Gender
- Location

Website Analytics

- How do donors end up on your website?
- On what device do donors visit your site from?

Motivations to Give

- Which programs or campaigns generate donations?
- Which programs are generating the most continued support?
- Which campaigns inspire your donors to give?
- Do your donors want to give monthly? Give in tribute? Give securities?

Giving Behaviour & Habits

- When did your donor give?
- When your donors first give?
- How often do your donors give?
- How much do they give?

- **Evaluate**
  - What is working vs. what is not?
  - What have you achieved? Did you hit goals?
  - Which communication channel do you see engagement with
  - What is your return on investment?

- **Plan**
  - Informed future decisions
  - Goal setting

- **Target**
  - Segment donors
  - Target groups that give the most
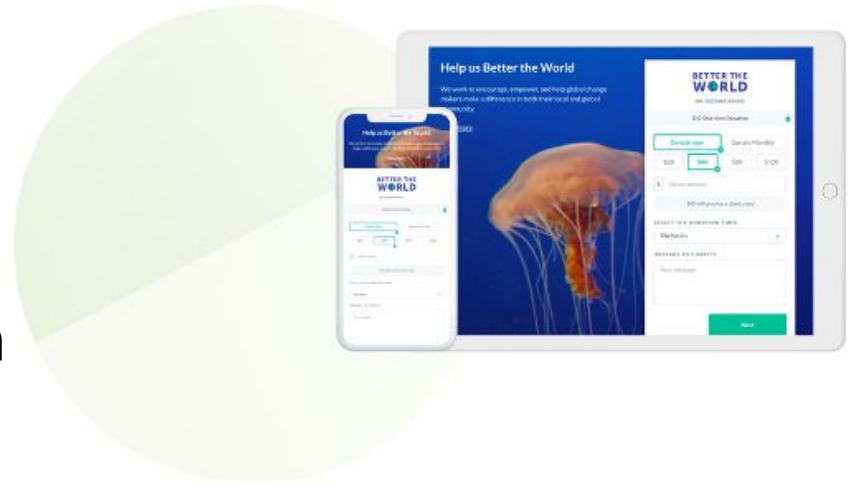 - Personalise stewardship

- **Monitor**
  - How measuring up?
  - What left to do…

- **Evaluate all over again!**

To collect this data, you will need…

- Ability to easily create multiple donation forms/ campaigns & track $'s
  - Direct Mail
  - Social Media
  - Website
  - Gift Guide
  - Corporate Partners

- Use a customizable solution

- Easy integration with Google Analytics

Key Additional Data Points (General Settings)

- **Name of Donation Form, Events, or Peer-to-Peer** (NOT Donor Facing):
  - Use for ROI purposes
  - Can code to benefit accounting or other tracking purposes

FORM NAME*

Enter a page name. This will not appear to donors visiting your page

> Enter form name

- **Fund** (Donor Facing)
  - Use for destination of funds
  - Will display as a picklist if multiple funds are available for selection
  - Will display on tax receipt

FUND ❓

○ No preset fund, let donor choose
● Select one or more funds

> No preset fund, let donor choose
> Donors will have choice of all funds made visible to Custom Donate Now pages.

> 🔍   ▼

Pick and order the funds a donor will see on this donation form

Key Additional Data Points (Other Customizations)

- **Custom Question:**
  - Optional Field
  - Could be organization or campaign-specific question
  - Standard questions:
    - How did you hear about us?
    - Did you want information about our Planned Giving Program?
    - Etc.
  - What do YOU want to know about your donors

CUSTOM QUESTION ❓

> Enter a question for the donor (English)

180 characters remaining

> Enter a question for the donor (French)

- **COMING IN NOVEMBER: Different Custom Question Types!**
  - Single Select
  - Multi-Select
  - Checkbox

Key Additional Data Points (Other Customizations)

- **Anonymity**:
    - Toggled on: You will NOT receive any donor data
    - Toggled off: You will receive COMPLETE donor data
    - This is in YOUR control

  DONOR ANONYMITY

  ☑ Allow donors to remain anonymous when donating to your organization

- **Mailing List Opt-In**
    - Donation is implicit consent (CASL) for 2 years
    - Opt-in is explicit consent (CASL) indefinitely

  MAILING LIST OPT-IN

  ☐ Enable opt-in question for your charity's mailing list

- **Collect Phone Number**
    - Optional Field (not required to complete transaction)

  COLLECT PHONE NUMBER

  ☐ Enable phone number collection

Key Additional Data Points (Analytics)

- **Google Analytics or Google Tag Manager (One or the Other)**:
  - Not using Google Analytics? NOW is the time to get started
  - **How are people arriving at my website?**
    - Social? Email? Direct? Google? If Google, what are they searching to arrive?
  - **Who are the people visiting my website?**
    - Demographics? Device?
  - **What about my donation pages?**
    - How many visitors? What is conversion? Who is converting highest?
  - **Google Tag Manager:**
    - A tool in which you would install all analytics trackers (Facebook Pixel, Google Ads, etc.)

GOOGLE ANALYTICS ❓

Enter your Google Analytics account number

GOOGLE TAG MANAGER ❓

Enter your Google Tag Manager account number

- Now is the time

- Your online presence has never been more important and will only grow

- Google Analytics is FREE

- Easy set-up

- Download the Guide and follow the simple steps!

The CanadaHelps Guide to
Google Analytics & Google Tag Manager for Your Customizable Donation Forms

Download
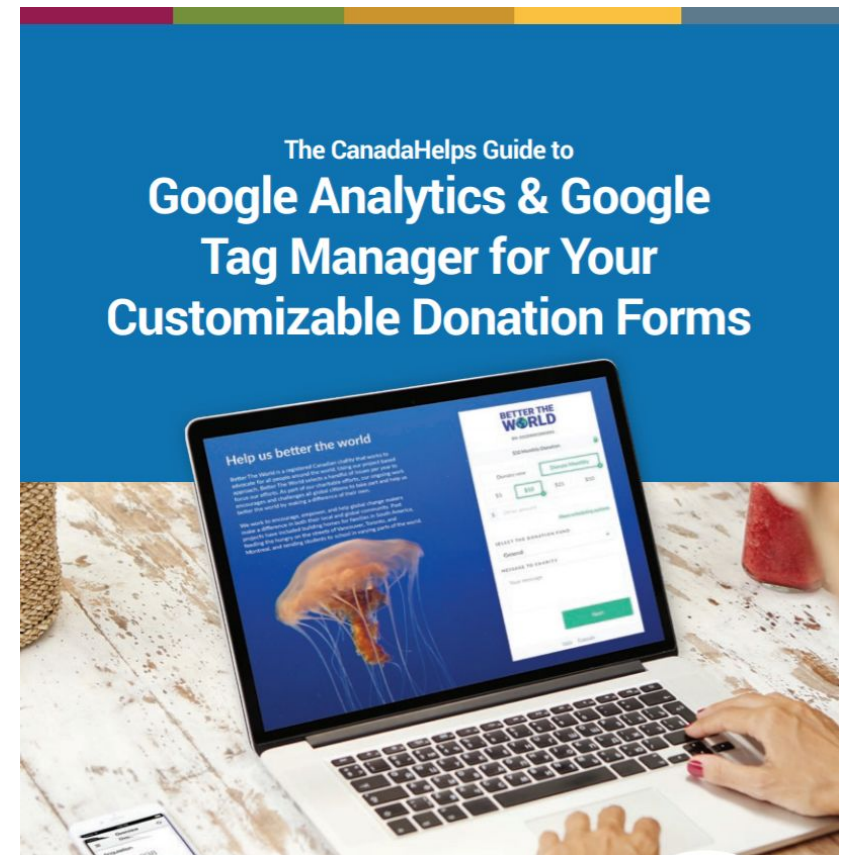
Import a pre-configured dashboard that includes:
- Total $ and # of Donations
- Conversion Rates site-wide and by page
- Donations by source (Social, Email, Direct)
- Donations by device
- And more!!!

CanadaHelps Google Analytics Dashboard

Import your pre-configured CanadaHelps dashboard for Google Analytics

Google Analytics allows you to create and import custom analytics dashboards to view your donation data at a glance. To make things simple, CanadaHelps offers a pre-configured Google Analytics dashboard you can use to see an overview of the performance of your CanadaHelps Customizable Donation Forms.

Track important metrics such as total donations, donations by channel, donations by device, donations by unique sessions, conversion rate by page and more. To import the dashboard from Google Analytics, **click here.**

IMPORT NOW

Download

CanadaHelps Donation Reports
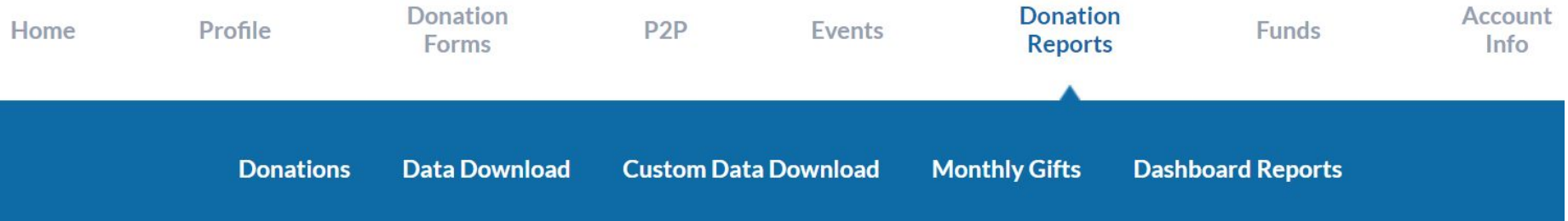
- **Donations**
  - PDF reports based on Disbursement Date
  - Perfect for accounting reconciliations purposes

- **Data Download**
  - CSV/ Excel Report
  - ALL CanadaHelps fields - a LOT of data!

- **Custom Data Download**
  - CSV/ Excel Report
  - Choose the fields YOU want AND relabel them
  - Pre-made CRM reports

CanadaHelps Data Glossary

Form/ Event/ P2P Name ⟹ **Page Title / Event Title**

Fund ⟹ **Fund Designation**

Custom Question ⟹ **Custom Donate Now Question**
Custom Donate Now Answer

Mailing List Opt-In ⟹ **Custom Donate Now AddToMailing List**
Events Email Opt-In

Collect Phone Number ⟹ **Custom Donate Now PhoneNumber**

Is it time for a Donor Management System?
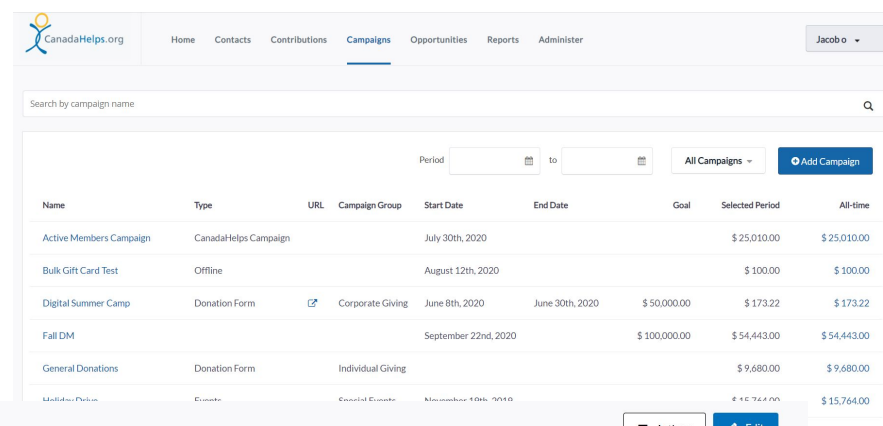
Hold on… What is a Donor Management System?

Donor Management Systems 101
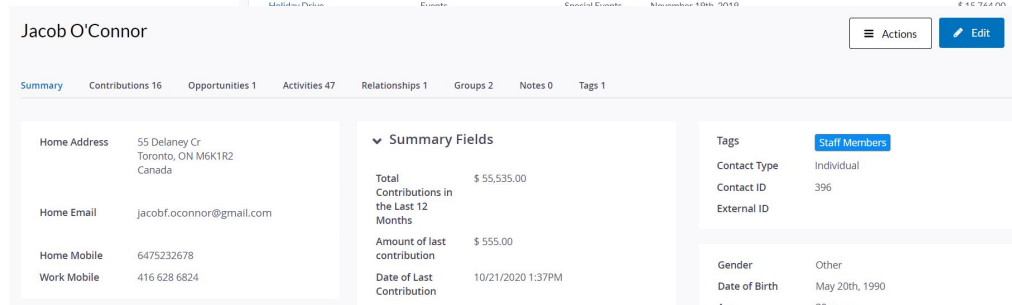
A system in which you store:

- **ALL of your Donor Data (Online/ Offline)**
  - Donor Information
  - Donation Information (Giving History, Method, Total #/$ of Gifts)
  - Communication Preferences
  - Communication History (Emails, Calls, Meetings)

- **Your Campaign Data**
  - How much was raised?
  - Did we reach our goals?
  - What types are most effective?
  - Who gave?

- **Your Outstanding Asks**
  - Major Gifts
  - Grants

Donor Management Systems 101

Allowing you to:

KNOW YOUR DONORS

IMPROVE YOUR STEWARDSHIP

RETAIN YOUR DONORS

BE MORE EFFICIENT

PLAN FOR THE FUTURE

CanadaHelps DMS: Key Features

All of your CanadaHelps data, and your own giving data in one place!

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

✔ Support: virtual, phone, email

Want to talk Data and Donor Management?

Don't hesitate to get in touch with our team.

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Thank you!