



# Last-Minute Tips to Boost Year-End Fundraising



**Pilar Albisu**  
Charity Success Manager  
[pilara@canadahelps.org](mailto:pilara@canadahelps.org)



**Tamara Rahmani**  
Western Canada Lead  
[tamarar@canadahelps.org](mailto:tamarar@canadahelps.org)



# 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](http://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



**Do you feel ready heading into the last month of the year?**

- a) Yes! We're excited!**
- b) Yes, but we could use some last-minute tips...**
- c) Is it already the last month of the year?!**

# Agenda

- Website Must-Haves to Drive Traffic for Year-End
- Donation Forms that Maximize Your Online Giving
- Easily Track Year-End Campaigns
- Communication Tools with a Click
- Q & A



# Website Must-Haves for Year-End: General Donation Form

1. Immediately visible donate button with contrasting colour



2. Donate button follows with navigation
3. Donate button takes you directly to your online donation form, no scrolling to find it (above the fold)
4. Form is embedded on its own landing page (if possible)

A screenshot of the "Donate Now" landing page and the donation form. The landing page features a background image of children in a classroom. The text on the page reads: "Donate Now. With donations like yours, we are able to provide shelter for homeless youth, fill stomachs for hungry children, and provide safe and supportive spaces for Niagara's most vulnerable children and youth. Your donation is the difference between vulnerable youth and successful outcomes. Bridge the gap for a Niagara youth at risk by taking action today." The form is titled "Make a donation" and includes a "DONATION DETAILS" section. It has a "Donate Now" button (highlighted with a green box) and a "Donate Monthly" button. Below these are input fields for "\$25", "\$80" (highlighted with a green box), "\$150", and "\$300". There is also a field for "Other" with a dollar sign icon. The form also includes a "MESSAGE FOR BOYS AND GIRLS CLUB OF NIAGARA (OPTIONAL)" field and a "DEDICATE YOUR DONATION" section with options for "In memory of", "In honour of", and "No dedication" (highlighted with a green box). A "Next" button is at the bottom of the form, and there are links for "Help" and "Errors" at the very bottom.

# Website Must-Haves for Year-End: Ways To Give Page

1. Clear option in menu for a “Ways to Give” or a “Get Involved”



2. Each giving option i.e. (Monthly Giving, Tribute Giving, Gifts of Stock/ Mutual Funds, etc.) has its own dedicated landing page.



3. Each form is embedded, above the fold and customized from start to finish to reflect its purpose.

## Gift of Securities

A screenshot of a web form titled 'Donate Securities'. The form is embedded within a page that also features a photo of a young girl in a pink shirt. The form has a blue header bar with the title 'DONATE SECURITIES'. Below the header, there is a text area with a message: 'Good news! You can now donate securities right on Habitat for Humanity Okanagan's website. You can make a bigger impact and reduce capital gains... Read More'. The form itself is titled 'DONATION DETAILS' and includes several input fields: 'DONATION TYPE' with a dropdown menu showing 'Securities' and 'Mutual Funds'; 'NAME/DESCRIPTION OF SECURITY\*' with a text input field labeled 'Security Name'; 'STOCK / TICKER SYMBOL' with a text input field labeled 'Typically 6-8 digits, alphanumeric'; and 'INVESTMENT MANAGEMENT' with a dropdown menu showing 'I use a self-directed online investment platform'.

# Donation Forms in Minutes

Home Profile **Donation Forms** P2P Events Donation Reports Funds Account Info

Customizable Donation Forms Donate Now Button Donate Securities Button Fundraise Now Button

← Back to all forms

## My Donation Form

FORM NAME\*

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

My Donation Form

Save

FORM TYPE

View sample form types: Full form, Multi step, Tribute FirstCause Funds Multi step - CH Only

Full form

- > General Settings
- > Other Customizations
- > One-time Donation Amounts
- > Monthly Donation Amounts
- > Custom Email Messages
- > Brand Form
- > Brand eCards
- > Analytics

NAME	CREATED	FUND	AMOUNT RAISED	ACTIONS
Super Awesome Donation Form	15/04/2020		\$0.00	<div><div>VIEW</div><div>EDIT</div><div>EMBED</div><div>URL</div><div>DEACTIVATE</div></div>

Cancel


Save & View

Save



# Track Your Year End Campaigns

1. Ask yourself what are your giving channels?  
Direct Mail, Email, Social, Online, Corporate Partner?
2. Create tailored experience for each giving channel with unique Custom Donation Forms
3. Features to keep in mind:
  - a. Page Title Field (only viewable to Administrators so make it your own i.e 'Direct Mail Form')
  - b. What is your goal? Brand accordingly.
    - Customize text, colour, images
    - Enable progress bar
    - Customize donation amounts
    - Add impact statements
    - Tie to a specific campaign fund
    - Customize thank you emails
    - Track your campaigns using Google Tag Manager.



The screenshot shows a donation form for the Prince Edward Point Bird Observatory. It features a header image of a yellow and black bird with a red heart containing a white Canadian maple leaf. The text 'Giving Tuesday Dec. 1 2020' is overlaid on the image. To the right, the title 'GIVING TUESDAY - PRINCE EDWARD POINT BIRD OBSERVATORY' is displayed, followed by a description: 'Help us continue Migration Monitoring for 25 more years at Prince Edward Point. Choose a level of support and see what each level...' and a 'Read more' link. Below the image, a progress bar shows 'FUNDS RAISED \$1,925.00'. A green bar labeled 'DONATION DETAILS' is followed by a 'ONE-TIME DONATION' section with input fields for \$125, \$250 (selected), \$375, \$500, and an 'Other' field. At the bottom, a note states: 'Northern Saw-whet Owl support level (\$10 for each of PEPTBO's 25 years) - includes advance notice of events, an exclusive guided tour of Cedar Woods plus acknowledgement on our web site (if desired)'.

**GIVING TUESDAY - PRINCE EDWARD POINT BIRD OBSERVATORY**

Help us continue Migration Monitoring for 25 more years at Prince Edward Point. Choose a level of support and see what each level...  
[Read more](#)

**FUNDS RAISED**  
**\$1,925.00**

**DONATION DETAILS**

**ONE-TIME DONATION**

Other

Northern Saw-whet Owl support level (\$10 for each of PEPTBO's 25 years) - includes advance notice of events, an exclusive guided tour of Cedar Woods plus acknowledgement on our web site (if desired)

# Additional Ways to Track ROI

## Google Analytics:

- *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 forms?*
  - How many visitors? What is conversion? Who is converting highest?

## Google Tag Manager:

- A tool where you 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

Download



# Thanking Your Donors

## Custom Donation Forms (Only) :

Home Profile **Donation Forms** P2P Events Donation Reports Funds Account Info

Customizable Donation Forms Donate Now Button Donate Securities Button Fundraise Now Button

← Back to all forms

### Food Drive Campaign

FORM NAME\*

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

Food Drive Campaign

Save

FORM TYPE

View sample form types: Full form, Multi step, Tribute FirstCause Funds Multi step - CH Only

Multi step

- > General Settings
- > Other Customizations
- > One-time Donation Amounts
- > Monthly Donation Amounts
- ✓ Custom Email Messages

Thank you for your donation!

Your gift is helping us provide more online learning materials to kids who need them most. Kudos to you!👍

Stay tuned for more news and updates by following us on [Twitter](#).


## Any individual donation (Profile, etc.)

P2P Events **Donation Reports** Funds Account Info

ad Custom Data Download Monthly Gifts Dashboard Reports

Search results include donations made in the last five years.

Search for a donor Search

SOURCE	FUND DESIGNATION	DONATION AMT	SAY THANKS
ail	New Technology Fund	\$3.00	

# Harnessing Your Data

Home

Profile

Donation  
Forms

P2P

Events

Donation  
Reports

Funds

Account  
Info

Donations

Data Download

Custom Data Download

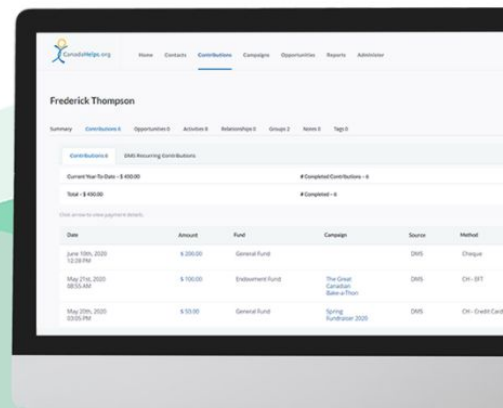
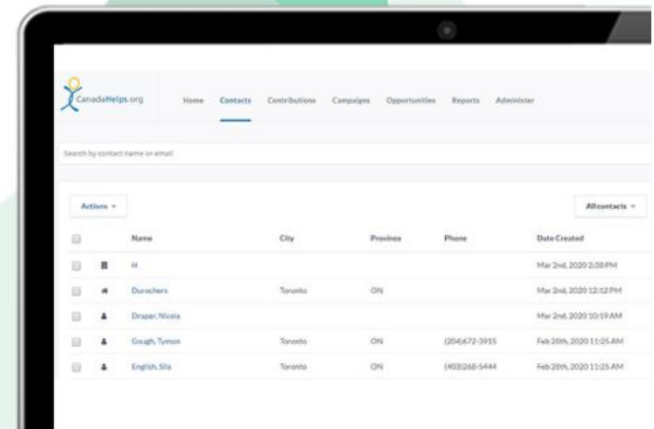
Monthly Gifts

Dashboard 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

# Introducing: CanadaHelps Donor Management System

- Know your donors
- Improve your stewardship
- Retain your donors
- Be more efficient
- Plan for the future



# Communicating With Your Donors in 2020

- Tell them just **how easy** online giving is
- Address any **security concerns**
- Explain how online gifts **help your charity**
- **Don't be afraid to ask:** now is the time to make the switch to virtual

## Key Takeaways

- **Clear and obvious** donate button that is linked to a Custom Donation Form
- Dive into your donor data- it's full of valuable insights!
- Don't wait! Now is the time to make sure your charity is accessible to donors online





**Pilar Albisu**  
**Charity Success Manager**  
**[pilara@canadahelps.org](mailto:pilara@canadahelps.org)**



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**Tamara Rahmani**  
**Western Canada Lead**  
**[tamarar@canadahelps.org](mailto:tamarar@canadahelps.org)**  
**604-351-7551**

[Click here](#) to subscribe to our charity emails for the latest news about our fundraising tools and tips!





**Thank you!**