Last-Minute Tips to Boost Year-End Fundraising

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CanadaHelps.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

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)

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

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

Home   About Us   Partners   KES Clubs   Ways to Give   Contact Us   Blog   **Donate Now**   🔍

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.

COUNTRY BUILD   THANKS TO OUR SUPPORTERS!   ABOUT ▾   BUILDS   HOME OWNERSHIP   NEWS   WAYS TO GIVE ▾

Gift of Securities

Donate Securities

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

DONATION DETAILS

DONATION TYPE

| Securities | Mutual Funds |

NAME/DESCRIPTION OF SECURITY*

Security Name

STOCK / TICKER SYMBOL

Typically 6-8 digits, alphanumeric

INVESTMENT MANAGEMENT

I use a self-directed online investment platform ▾

Donation Forms in Minutes

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.

Additional Ways to Track ROI

<u>Google Analytics:</u>

- *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?

<u>Google Tag Manager:</u>

- A tool where you install all analytics trackers (Facebook Pixtel, Google Ads, etc.)

GOOGLE ANALYTICS ❓

Enter your Google Analytics account number

Download

GOOGLE TAG MANAGER ❓

Enter your Google Tag Manager account number

Thanking Your Donors

Custom Donation Forms (Only) :

Any individual donation (Profile, etc.)

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**
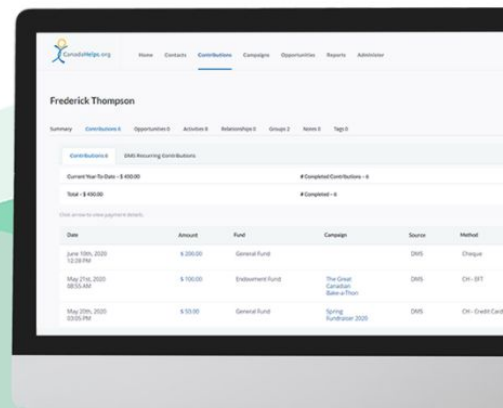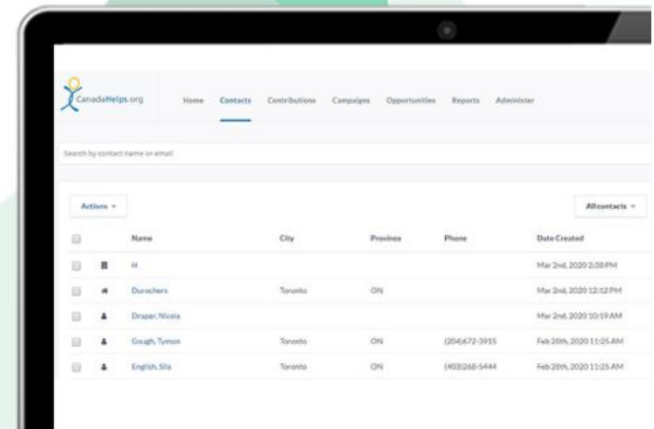
Communicating With Your Donors in 2020

- 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! <u>Now </u>is the time to make sure your charity is accessible to donors online

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Click here to subscribe to our charity emails for the latest news about our fundraising tools and tips!

Thank you!