



Steward Your Donors into the New Year



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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



Happy New Year!


Agenda

- What is Donor Stewardship and why should it be a focus?
- Key Metrics
- Email, Phone, and Direct Mail
- Donor Management
- Questions & Answers





**So what do we mean when we
say “Donor Stewardship”?**



**How you, as an organization,
build healthy relationships
with your donors.**



Why is it important?

Why is it important?

- Basic Level - These are your funders and supporters.
- Lack of in-person interaction and events.
- Easier and less costly than acquiring a new donor.
- They LEAVE! Top 4 Reasons*:
 1. They were never thanked for their donation.
 2. They weren't provided information on how donations were being used.
 3. Poor service or communication.
 4. Felt like the charity didn't need their gift.

Key Metric: Retention Rate

Retention Rate =
Y1 Repeat Donors in Y2 /
Y1 Donors

Key Metric: Retention Rate

2020 Retention Rate =
2019 Repeat Donors in 2020/
2019 Donors

Key Metric: Retention Rate

2020 Retention Rate =
43 /
100

43% is the average retention rate*

Key Metric: Retention Rate

Scenario A: 30% Retention Rate

Scenario B: 50% Retention Rate

Y1 100 Donors, \$200 Average Donation/ Donor

	Y1	Y2	Y3	Y4	Y5	Total
A	\$20,000	\$6,000	\$1,800	\$540	\$162	\$28,502
B	\$20,000	\$10,000	\$5,000	\$2,500	\$1250	\$38,750

Key Metric: Lifetime Value

The average value of a donor over their lifetime with your organization. In a monetary sense, this is how much a donor is worth to your organization.

VERY Simple Formula:

$$\text{LTV} = \text{Average Annual Amount} / \text{Attrition Rate}$$

How do I find Attrition Rate? $1 - \text{Retention Rate}$

Life Time Value (LTV)

$$A: 200 / 0.7 = \$286$$

$$B: 200 / 0.5 = \$400$$



Now that we know the value...

EVERYONE fundraising at your organization should know this value. Will help to drive decisions and the way that we treat and steward our donors.

Shift from short-term to long-term focus. How much can we spend?

Two Key Drivers:

- Retention
- Average Annual Gift Amount

Revisiting - Why Donors LEAVE! Top 4 Reasons*:

1. They were never thanked for their donation.
2. They weren't provided information on how donations were being used.
3. Poor service or communication.
4. Felt like the charity didn't need their gift.

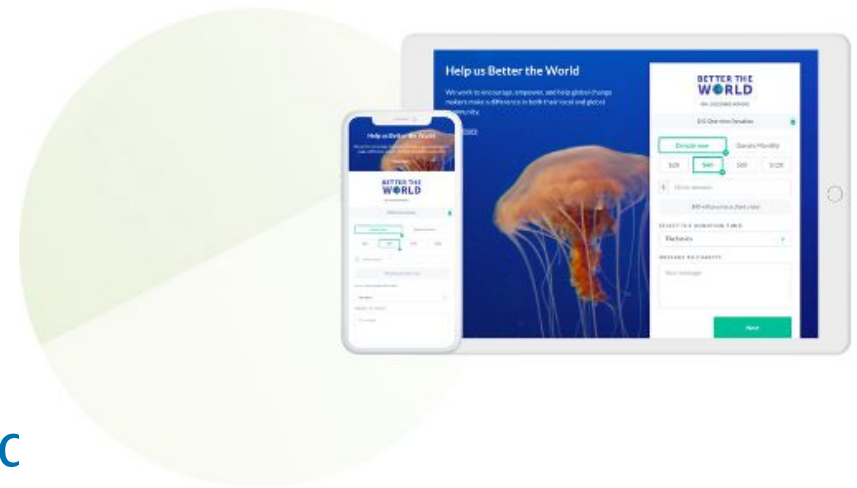
All boils down to **COMMUNICATION** and **RELATIONSHIPS**.

They were never thanked for their donation.

- Thank them within 24 hours.
- Personalize the thank you.
 - a. Who are they?
 - b. How did they give?
 - i. Campaign?
 - ii. Fund?
 - iii. Method?
 - c. How much did they give?

To do this, you will need...

- Ability to present different campaigns / funds to your donors
- Multiple donation forms (not just one general form!)
- An easy way to sort through and track data / automate mass-communications



Through CanadaHelps...

- Create as many donation forms as you like for different giving methods (eg. Donate Now, Monthly, Tribute, Securities) or Campaigns / Projects (eg. Giving Tuesday, Holiday Campaign, Specific Program)
- Customize the Thank-You Messages for EACH FORM that are AUTOMATICALLY sent
- Collect KEY DATA to leverage

The screenshot shows the CanadaHelps.org website interface. At the top, the logo 'CanadaHelps.org giving made simple' is on the left, and navigation links for 'Français', 'Help', 'Giving Basket', and 'Canada Helps' are on the right. Below this is a horizontal menu with links: 'Donate', 'Discover', 'Fundraise', 'Why CanadaHelps', 'Blog', and 'For Charities'. A secondary menu includes 'Home', 'Profile', 'Donation Forms' (highlighted with a red box), 'P2P', 'Events', 'Donation Reports', 'Funds', and 'Account Info'. Below the secondary menu is a blue bar with links: 'Customizable Donation Forms' (highlighted with a red box), 'Donate Now Button', 'Donate Securities Button', and 'Fundraise Now Button'. The main content area is titled 'Customizable Donation Forms' and features a 'Create new form' button (highlighted with a red box). Below this, there is a section for 'Custom Email Messages' (highlighted with a red box) with a 'Save' button. This section contains three text editors for customizing thank-you messages: 'ONE-TIME DONATION THANK YOU EMAIL (ENGLISH)', 'ONE-TIME DONATION THANK YOU EMAIL (FRENCH)', and 'MONTHLY DONATION THANK YOU EMAIL (ENGLISH)'. Each editor has a 'Formats' dropdown and a rich text editor toolbar. The instructions for each editor are: 'Enter a message to your donors that will appear in the opening paragraph of the donation confirmation email sent by CanadaHelps (English/French)'. A '1200 characters remaining' indicator is shown at the bottom of each editor.

Key Additional Data Points (General Settings)

- **Name of Donation Form, Events, or Peer-to-Peer (NOT Donor Facing):**
 - Use for ROI purposes as a Campaign and;
 - To benefit Stewardship and Account 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 and to benefit Stewardship
 - 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)



- **NEW FEATURE: 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

Internally Leveraging the Data

Segment your Retention and LTV by:

- Giving Method (One-time, Monthly, Tribute)
- Channel (Email, Direct Mail, Social, Events)
- Campaign
- Any piece of data you can collect!

Email Communications

To leverage this data, and to communicate efficiently in a personalized manner, you **WILL** need an email marketing tool. Some cost-effective tools to look at:

- MailChimp
- ConstantContact
- Sendinblue
- iContact

Tools should integrate with your donor database or donor management system. Alternatively, you could use your donor management system directly.

Email Communications

Email Marketing tools allow you to segment your lists and leverage merge fields for mass personalization!

What is a merge field?

“Hello <First Name>,”

Thank you so much for your generous gift of \$<Donation Amount> to our <Campaign Name> Campaign.

Thank You!

Jane Doe”

Email Communications

Types of Emails:

1. Thank You
2. Welcome Email
3. Newsletter (Quarterly, Monthly)
4. Segmented Emails (Based on Giving History)
5. Direct Email Appeals... and many more!

Tips:

1. Pay attention to the Subject and From fields
2. Keep the content brief and compelling
3. Include clear Calls-to-Action (CTAs)
4. Include Photos or Videos
5. Create a Header and Footer for your emails

Digital Donor Retention Whitepaper

Find out how to:

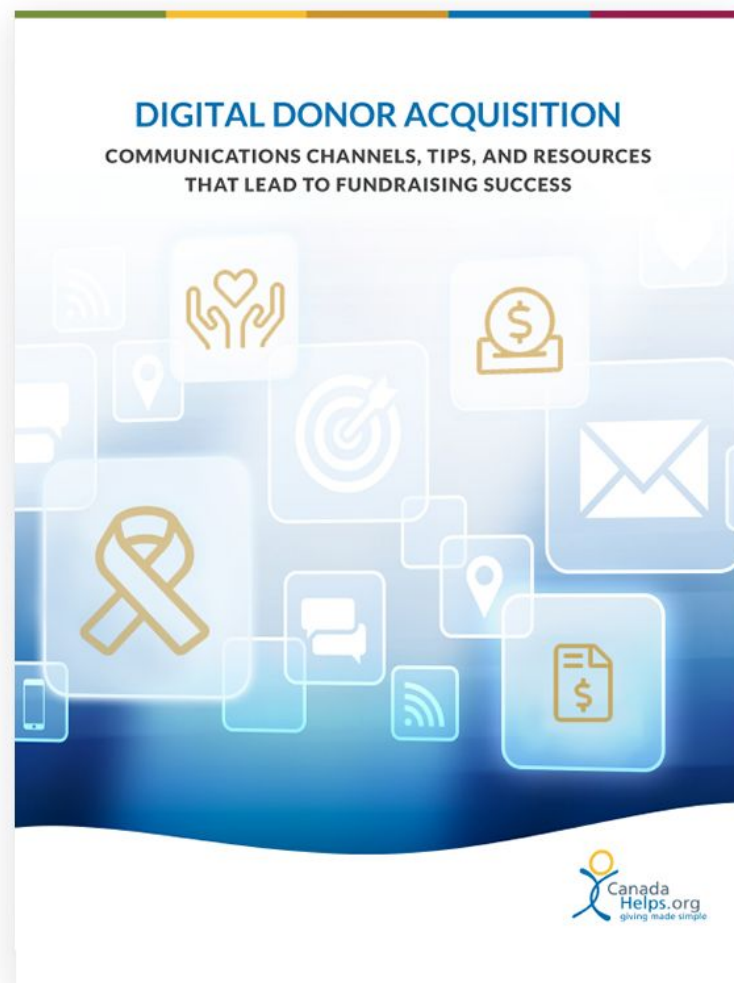
- Plan for donor retention by understanding why donors leave, what you can do about it, and best practices for stewardship;
- Use email marketing to increase retention and engagement;
- Leverage social media to build a loyal online community that supports your mission;
- Inspire monthly giving by converting new donors and keeping the attention of recurring donors; and
- Know when it's time to give up on spreadsheets and consider using a Donor Management System to manage lasting donor relationships.



Digital Donor Acquisition Whitepaper

Find out how to:

- Set goals and strategies to help you build effective donor acquisition programs;
- Optimize your website and Search Engine Optimization (SEO) to lead more potential donors to your charity;
- Leverage email marketing to build stronger relationships with your supporters and convert more prospects into donors;
- Engage potential donors and amplify your charity's online presence using social media; and
- Drive more donations and grow your donor base using Search Engine Marketing, paid ads, and more!



Pick up the phone...

Get a direct line into your donors and build relationships. You will be amazed at what you learn.

- Be authentic
- THANK them
- Share impact
- LISTEN

***Good way to get Board Members engaged!**

Direct Mail

Very difficult without a Donor Management System!

- Be mindful of potential mailing difficulties
- No better time than now to convert to online
- Explain WHY
- Make it EASY!

CanadaHelps Donation Reports

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

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?**

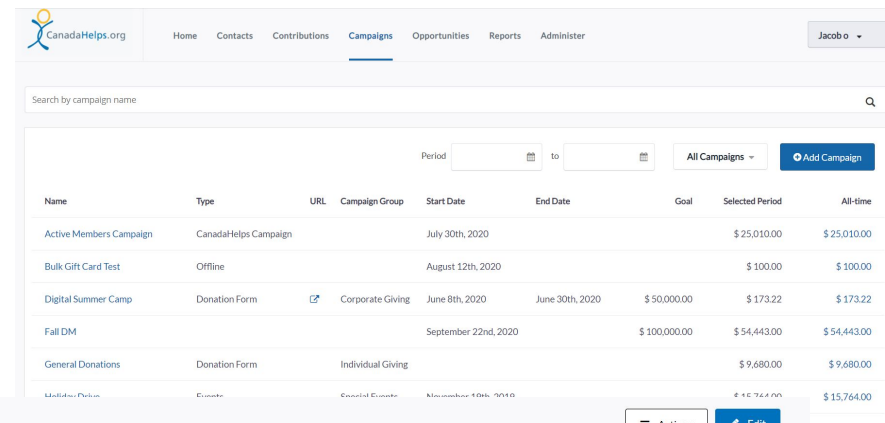


Hold on... What is a Donor Management System?

Donor Management Systems 101

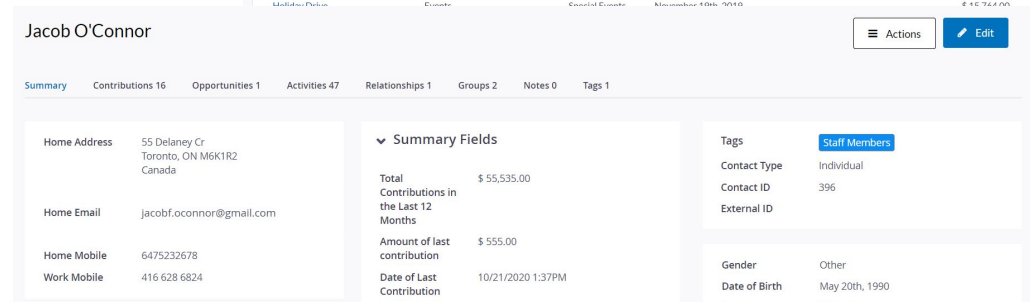
A system in which you store:

- **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 Opportunities**
 - Major Gifts
 - Grants



The screenshot shows the 'Campaigns' section of the CanadaHelps.org website. It features a search bar, a table of campaigns, and a sidebar with navigation links. The table lists various campaigns with columns for Name, Type, URL, Campaign Group, Start Date, End Date, Goal, Selected Period, and All-time. The campaigns listed include Active Members Campaign, Bulk Gift Card Test, Digital Summer Camp, Fall DM, General Donations, and Multiple Pledge.

Name	Type	URL	Campaign Group	Start Date	End Date	Goal	Selected Period	All-time
Active Members Campaign	CanadaHelps Campaign			July 30th, 2020		\$ 25,010.00		\$ 25,010.00
Bulk Gift Card Test	Offline			August 12th, 2020		\$ 100.00		\$ 100.00
Digital Summer Camp	Donation Form	Link	Corporate Giving	June 8th, 2020	June 30th, 2020	\$ 50,000.00	\$ 173.22	\$ 173.22
Fall DM				September 22nd, 2020		\$ 100,000.00	\$ 54,443.00	\$ 54,443.00
General Donations	Donation Form		Individual Giving			\$ 9,680.00		\$ 9,680.00
Multiple Pledge	Event			November 10th, 2020		\$ 10,764.00		\$ 15,764.00



The screenshot shows the donor profile page for Jacob O'Connor. It includes a summary of contributions, contact information, and a list of tags. The summary shows a total of \$55,535.00 in contributions over the last 12 months, with a date of last contribution of 10/21/2020 1:37PM. The contact information includes a home address, email, and mobile numbers. The tags section shows 'Staff Members' and 'Individual'.

Jacob O'Connor

Summary Contributions 16 Opportunities 1 Activities 47 Relationships 1 Groups 2 Notes 0 Tags 1

Home Address 55 Delaney Cr
Toronto, ON M6K1R2
Canada

Home Email jacobf.oconnor@gmail.com

Home Mobile 6475232678

Work Mobile 416 628 6824

Summary Fields

Total Contributions in the Last 12 Months \$ 55,535.00

Amount of last contribution \$ 555.00

Date of Last Contribution 10/21/2020 1:37PM

Tags **Staff Members**

Contact Type Individual

Contact ID 396

External ID

Gender Other

Date of Birth May 20th, 1990



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

This screenshot shows the 'New Household' form in the CanadaHelps DMS. The form is titled 'New Household' and includes a link to 'EXPAND ALL TABS'. Under the 'Contact Details' tab, there are fields for 'Household Name', 'Nickname', 'Email', 'Phone', 'On Hold?', 'Bulk Mailings?', 'Phone Location', and 'Phone Type'. There is also a section for 'Add another Phone number'.

This screenshot shows the 'Contributions' form in the CanadaHelps DMS. The form is titled 'Contributions' and includes a link to 'EXPAND ALL TABS'. It contains fields for 'Contact', 'Fund', 'Total Amount', 'Start Date', 'Source', 'Campaign group', 'Receipt Date', and 'Payment Processor'. There are also buttons for 'Save', 'Save And New', and 'Cancel'. The form includes instructions on how to use it for recurring contributions and how to set a start date for recurring contributions.



**Want to talk Data and
Donor Management?**

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



Questions?



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@CharityLifeCa



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Thank you!