

Everything You Need for Year-End Fundraising Success



Laura Dempsey
Eastern Canada Lead,
laurad@canadahelps.org



Marko Miketic
Senior Charity Engagement Representative
markom@canadahelps.org

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 BILLION
RAISED

2 MILLION
DONORS

20,700
CHARITY
PARTNERS

- Diving into your Data
- Planning your digital touchpoints
- Donation form power
- Gift Guide 101
- Strategy & Tools
- Endless donation form possibilities
- Harness that data again!
- Questions & Answers



Dive into your data- equip yourself with information!

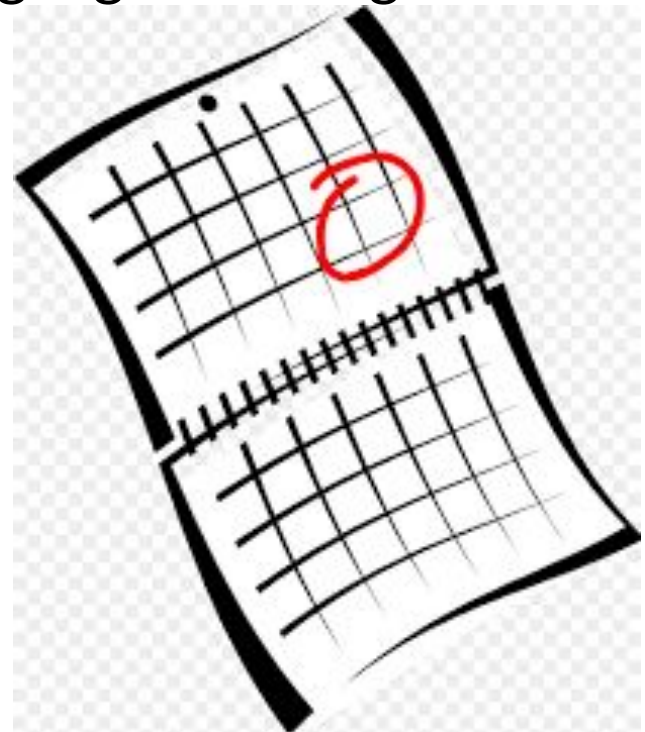
- Get detailed information about donations made to your charity, and any payments sent to your account
- Download comprehensive reports showing all donor data
- Create customized reports to view only the donor information *you need*
- Learn how your donors gave and to what program or campaign

The screenshot displays the CanadaHelps.org donor dashboard. At the top, there's a navigation bar with links for 'Donate', 'Discover', 'Fundraise', 'Why CanadaHelps', 'Blog', and 'For Charities'. Below this is a secondary navigation bar with 'Home', 'Profile', 'Donation Forms', 'P2P', 'Events', 'Donation Reports', 'Funds', and 'Account Info'. The 'Donation Reports' section is active, showing a sub-menu with 'Donations', 'Data Download', 'Custom Data Download', 'Monthly Gifts', and 'Dashboard Reports'. The main content area is titled 'Disbursed Donations' and includes a 'Disbursement Schedule Info' link. It shows a table of disbursements for May 2020, with columns for 'Disbursement Date', 'Amount', and 'Donations'. Below the table, there are two summary boxes: 'Total Donations' (789,774 donations totalling \$6,694,461.22) and 'Donations To Be Disbursed' (14,306 totalling \$1,514,579.61 on May 28, 2020). A 'Donation Summary' section at the bottom includes a search bar and a table of donation details.

Disbursement Date	Amount	Donations
07/05/2020	\$38,397.99	5412
14/05/2020	\$31,469.91	5182
21/05/2020	\$244,329.65	30629

STATUS	DATE	NAME	EMAIL	SOURCE	FUND DESIGNATION	DONATION AMT	SAY THANKS
	26/05/2020	Anonymous	-			\$4.00	

- Digital Touchpoints more important now than ever before
- It's never too early to start planning
- October- Make your donors aware
- November- Reflect on the year & highlight all the good stuff
- December- Donation time
- January- Stewardship is key



The power of a mighty donation form

1. Create a Donate Button



2. Create Donation Form

Rossbrook House
FOUNDATION
BN: 807614076RR0001

Make a donation

DONATION DETAILS

AMOUNT

Donate Now Donate Monthly

\$ Amount

FUND

Rossbrook House Foundation

MESSAGE FOR ROSSBROOK HOUSE FOUNDATION INC. (OPTIONAL)

DEDICATE YOUR DONATION

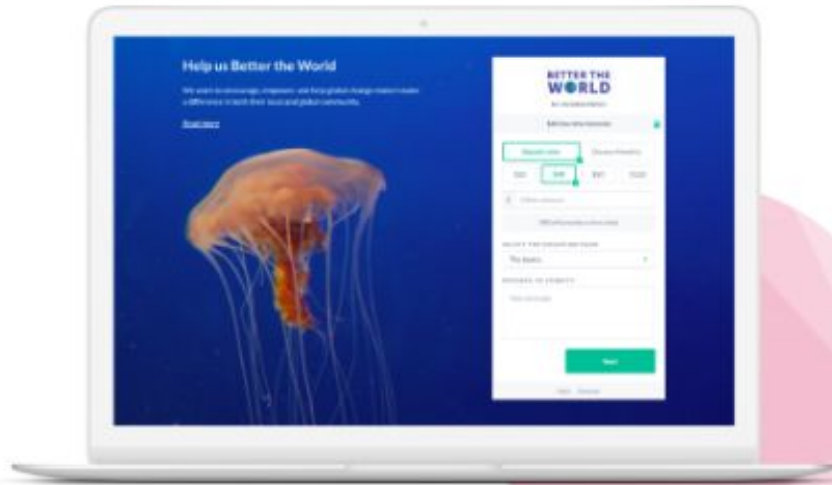
In memory of In honour of No dedication

Next

[Help](#) | [Français](#)

3. Either Embed or Link to your website

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>



- Collect donations directly on your website
- One-time and monthly gifts
- Tribute giving and free eCards
- Automatic, branded receipting
- Fully mobile optimized pages
- Responsive design
- Extensive configuration options
- Full donor data
- Google Analytics tracking
- Google Tag Manager tracking
- No coding experience required!





Gifts that Teach

\$80 a month

Midwives save lives

[Buy Gift](#)



Gifts that Move

\$75

Bikes bring health home

[Buy Gift](#)

[Browse charitable gift ideas from over a hundred charities!](#)



Give hope and warm hearts!

It doesn't take a lot to make a real difference. Plus, great ideas for stocking stuffers!

[Gift \\$25 or Less](#)



Gifts that can change a life!

Browse charity gifts to help those in need both in Canada and abroad.

[Gifts \\$26 to \\$100](#)



Drive change and help make the world a better place.

Help Improve many lives with these gifts that give back.

[Gifts \\$101 to \\$250](#)



[Report Animal Cruelty](#) | [Contact Us](#) | [Find Your SPCA](#) | [FAQs](#) | [Search](#)

[How You Can Help](#)

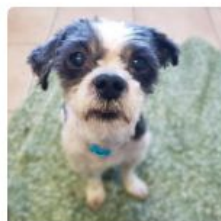
[Programs & Services](#)

[Community](#)

[Who We Are](#)

[DONATE](#)

Gift Guide



Relief Grooming

\$80

[VIEW ITEM](#)



Orphan Incubator

\$1,500

[VIEW ITEM](#)



Recovery Kennel/Bed

\$120

[VIEW ITEM](#)



Pens for Exercise

\$80

[VIEW ITEM](#)



Foster Family Kit



Itty Bitty Bottle Babies



Life Saving Medication



Veterinary Surgical Kit



1. Create a personal donor journey for your segmented donors
2. Encourage larger than average gifts
3. Create an impact driven campaign- financial & non financial
4. Create Urgency & show donors they are part of a community
5. Continue to build donor email list
6. Stay focused on stewardship
7. Set & track your goals



1. Customize forms for each group & ask
2. Provide suggested donation amounts
3. Add impact statements tied to \$'s
4. Include a fundraising Goal Bar
5. Include mailing Opt in
6. Utilise custom thank you messages (& additional thank you tool)
7. Fundraising goal bar & dive into donation reports

The possibilities are endless...

WAYS TO GIVE



MONTHLY GIVING



TRIBUTE GIVING



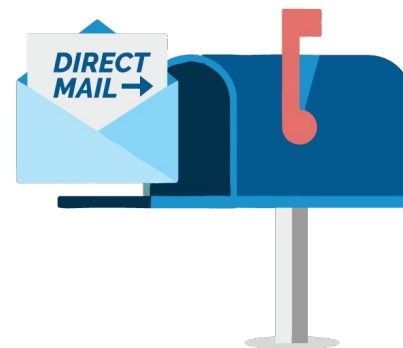
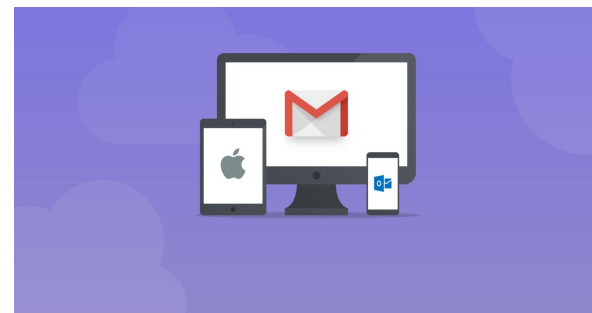
PERSONAL & PLANNED
GIVING



BECOME A PARTNER



HOST A FUNDRAISING EVENT



YOU HAD ME AT DATA

Remembering to check back in on that data...

- How did you match up against your goals?
- Which form generated the most engagement?
- Who are your new supporters?
- Is there the potential to convert these into recurring gifts?
- Major gifts?

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
- ✓ Client Support: online, email, phone, Help Wizard, and video tutorials

The image displays two screenshots of the CanadaHelps DMS interface. The top screenshot shows the 'New Household' form, which includes fields for Household Name, Nickname, Email, Phone, and On Hold status. The bottom screenshot shows the 'Contributions' form, which includes fields for Contact, Fund, Total Amount, Start Date, Source, Campaign group, Receipt Date, and Payment Processor. Both forms are part of a web application with a navigation bar at the top.

[Click here](#) to fill out the donor management system information request form!

- Never too early to begin planning
- **Clear and obvious** donate button that is linked to a Custom Donation Form
- Get creative with these forms & build donor journeys
- Utilize your data
- Download our free whitepaper!





Laura Dempsey

Eastern Canada Lead,
Charity Engagement
laurad@canadahelps.org



[@CharityLifeCa](https://twitter.com/CharityLifeCa)



linkedin.com/company/canadahelps



Marko Miketic

Senior Charity Engagement
Representative
markom@canadahelps.org



facebook.com/CanadaHelpsForCharities

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

Ever-Growing Collection of COVID-19 Resources:
<https://www.canadahelps.org/en/charity-life/covid-19/covid-19-resources-for-canadian-charities/>

Creative Virtual Fundraisers:
<https://www.canadahelps.org/en/charity-life/fundraising-2/3-creative-real-life-virtual-fundraisers/>

4 Critical Elements to Get Your Site Ready to Accept Donations:
<https://www.canadahelps.org/en/charity-life/fundraising-2/4-critical-elements-to-get-your-site-ready-to-accept-donations/>

2 Important Ways to Drive Supporters To Your Site
<https://www.canadahelps.org/en/charity-life/digital-marketing/2-important-ways-to-drive-supporters-to-your-site/>

Charity Life Blog:
<https://www.canadahelps.org/en/category/charity-life/>

White Papers, Webinars & How to Resources:
<https://www.canadahelps.org/en/for-charities/white-papers/>

Canadian Charities Connect Facebook Group:
<https://www.facebook.com/groups/CanadianCharitiesConnect>