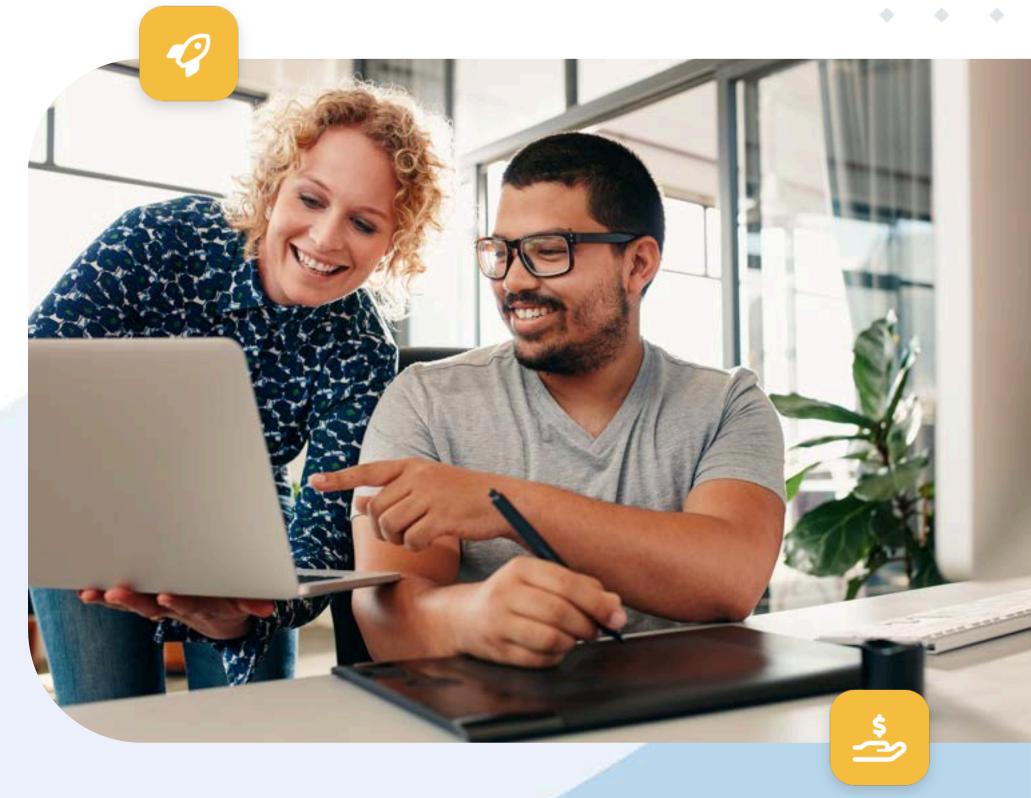


A Smarter Way to Track Your Fundraising Success







Tamara Rahimi Senior Manager, Charity Success



Rochelle Gonzales
Product Manager, B2B

Land Acknowledgement

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.

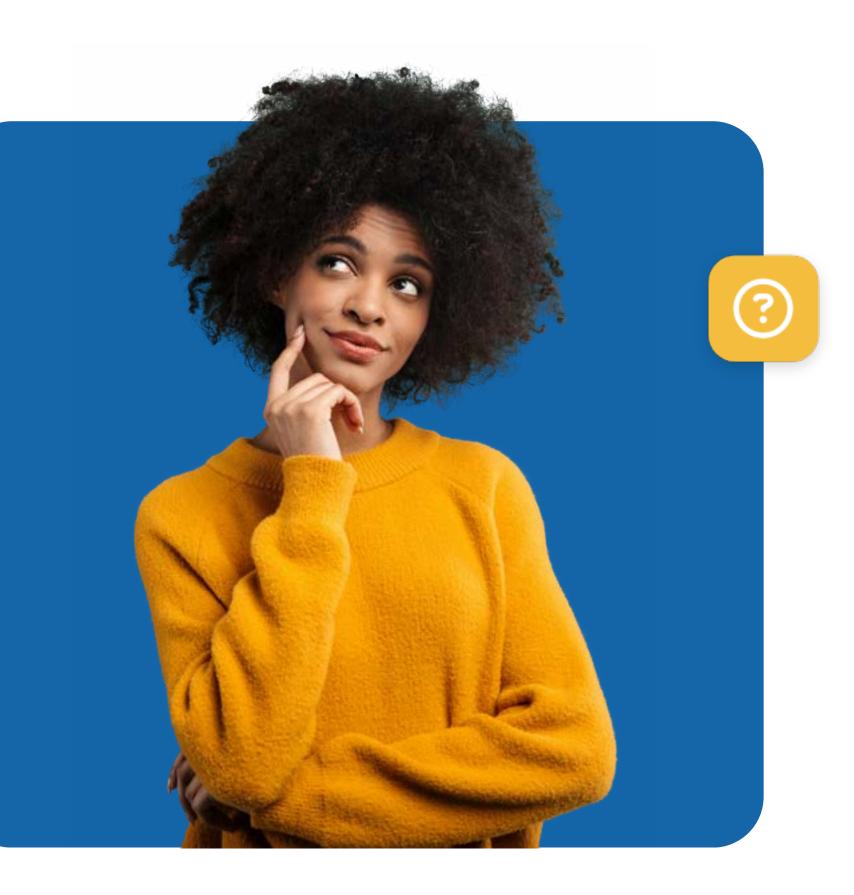


Source: #BeadYourProvince, Kooteen Creations

About CanadaHelps

- CanadaHelps is a charitable foundation increasing giving in Canada through technology.
- **For Canadians,** CanadaHelps.org, provides a trusted one-stop destination for making donations, fundraising, or learning about any charity in Canada.
- For Canada's 86,000 charities, we also develop affordable fundraising technology and provide free training and education for charities so that all charities have the capacity to increase their impact and succeed in the digital age.
- Since 2000, more than 3.5 million Canadians have donated over \$2.3 billion to charities using CanadaHelps.





Have a Question?

- You can hear us, but we can't hear you.
- Have questions or technical difficulties?
- Type them into the Questions Log at any time.

We'll also **email you a recording** following the webinar to watch the presentation on demand.

CanadaHelps

A Smarter Way to Track Your Fundraising Success

Save the date

GIVINGTUESDAY

is December 3rd, 2024



www.GivingTuesday.ca | #GivingTuesdayCA

About the Presenter



Tamara Rahimi Senior Manager, Charity Success | CanadaHelps

Tamara Rahmani is a seasoned professional in the nonprofit sector, currently leading CanadaHelps' Charity Success Team. Since joining CanadaHelps in 2016, she has collaborated with thousands of charities nationwide, removing technological barriers to help them advance their missions.

About the Presenter



Rochelle Gonzales Product Manager, B2B | CanadaHelps

As an experienced Product Manager, Rochelle focuses on developing a suite of products that empower charities to optimize their fundraising efforts and manage donor relationships. With a commitment to enhancing user experience, she ensures that CanadaHelps' solutions evolve with the needs of Canadian charities.



Agenda

- 1. SMART Goals: The Key to Fundraising Growth
- 2. Where to Begin: Setting Your SMART Goal
- 3. Demo: Using the Giving Season Report
- 4. Demo: Mastering Your Goal Tracking
- 5. Progress: Taking Steps Towards Your Goal
- 6. Iterate: Embracing Continuous Improvement
- 7. Q&A

PART 1 SMART Goals: The Key to Fundraising Growth

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People who set SMART goals, track progress, and share updates, are 33% more likely to achieve their goals than those with unwritten goals.

Source: Achieving your goals: An evidence-based approach, Michigan State University

What is a SMART Goal?



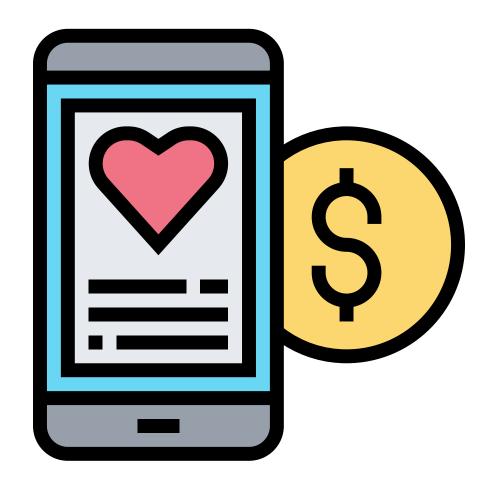
We will raise \$10,000 this GivingTuesday (Dec. 3, 2024), a 20% increase from the amount we raised in 2023 to fund a new education program for underprivileged youth.

What Goals Should I Measure?

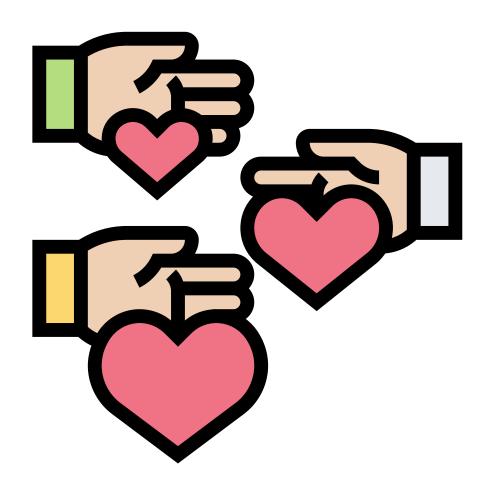
Key **fundraising metrics** include:



Funds Raised



Number of Donations



Number of Donors

Why Should I Track These Metrics?

To attract and retain donors.





Tracking funds raised helps you identify the most successful fundraising tactics, which can be used in future initiatives.

To motivate your team and volunteers.



57%51%

58%

of charities are unable to meet current levels of demand

of charities are highly concerned about staff burnout

of small charities are fully run by volunteers

To provide informed decisionmaking for your **board**.





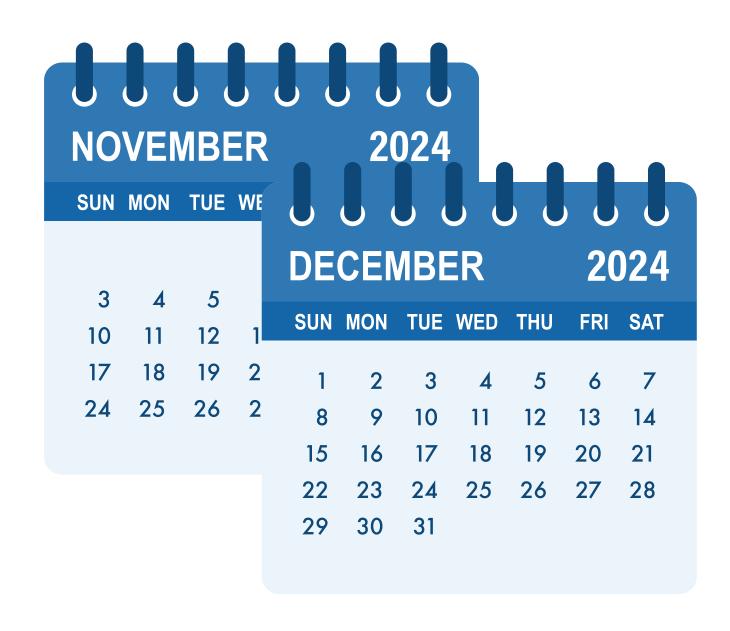
Transparent financial reporting builds trust, which is critical when the board communicates with key stakeholders. Plus, this data helps them make more informed strategic decisions!

Source: The Giving Report 2023 & 2024, CanadaHelps

CanadaHelps

A Smarter Way to Track Your Fundraising Success

With the Giving Season upon us, now is the time to start! According to CanadaHelps data...



The Giving Season accounts for

42%

of annual revenue for charities

With the Giving Season upon us, now is the time to start! According to CanadaHelps data...



The Giving Season accounts for 42% of annual revenue for charities

GivingTuesday of annual revenue accounts for for charities

With the Giving Season upon us, now is the time to start! According to CanadaHelps data...



The Giving Season accounts for 42% of annual revenue for charities

Giving Tuesday accounts for 3% of annual revenue for charities

The month of December accounts for 30% of annual revenue for charities

With the Giving Season upon us, now is the time to start! According to CanadaHelps data...



The Giving Season of annual revenue accounts for for charities **Giving Tuesday** of annual revenue for charities accounts for The month of December of annual revenue for charities accounts for of annual revenue The last 3 days of the year for charities accounts for

PART 2 Where to Begin: Setting Your SMART Goal

• • •

Setting a benchmark based on past results is a great place to start your SMART fundraising goal.

Where Do I Begin?

Before we get to those benchmarks, first ensure your SMART goal is Specific and Relevant. It should answer the questions:

- What does your organization want to achieve?
- What is the impact on your mission?
- Does it align with your organization's larger objectives?
- Who is involved?
- Where will it happen?
- Why is it important?

For example, if your mission focuses on education, a relevant goal could be about funding a scholarship program, rather than just increasing overall donations.



Where Do I Begin?

Next, leverage data such as **Giving Season benchmarks** to help ensure your **SMART** goal is Measurable, Achievable and Time-Bound.

Goal Name	Duration	Fundraising Benchmark
Giving Season	November 1 - December 31	
GivingTuesday	December 3	
December	December 1 - 31	
Last 3 Days of the Year	December 29 - 31	

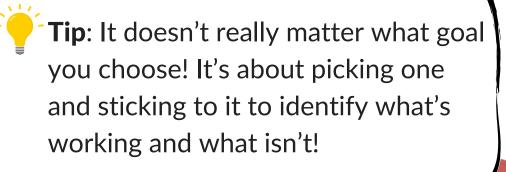


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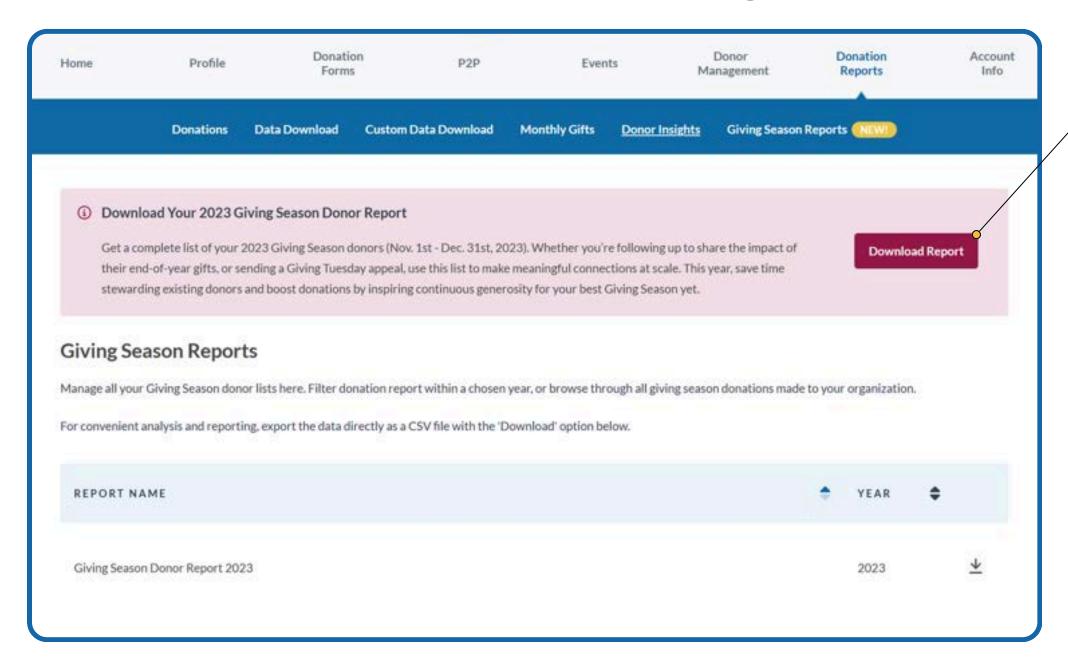


PART 3

Demo: Using the Giving Season Report

Giving Season Fundraising Benchmarks

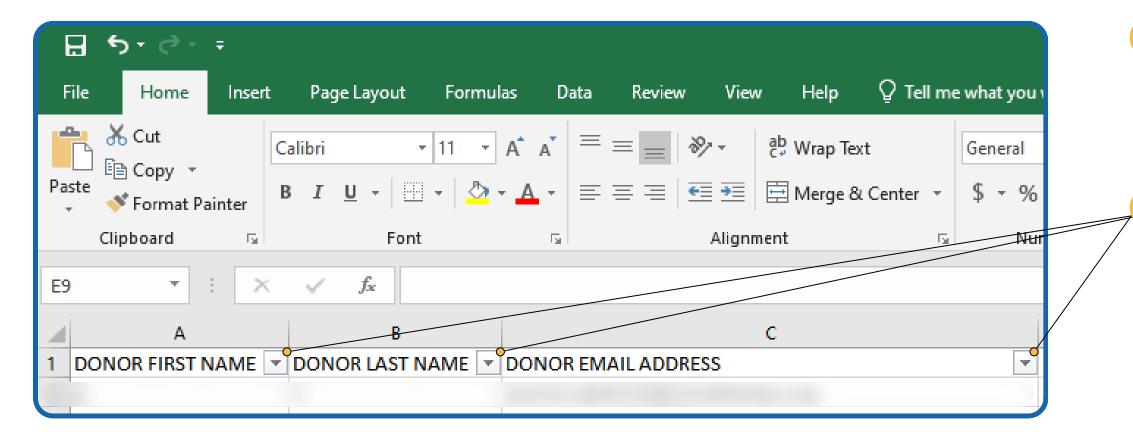
How to benchmark the four essential Giving Season fundraising goals:



If you fundraised through CanadaHelps last year, start by downloading your **Giving**Season Donor Report from your charity account in the Donation Reports tab.

Benchmarking Giving Season Goals

How to benchmark the four essential Giving Season fundraising goals:

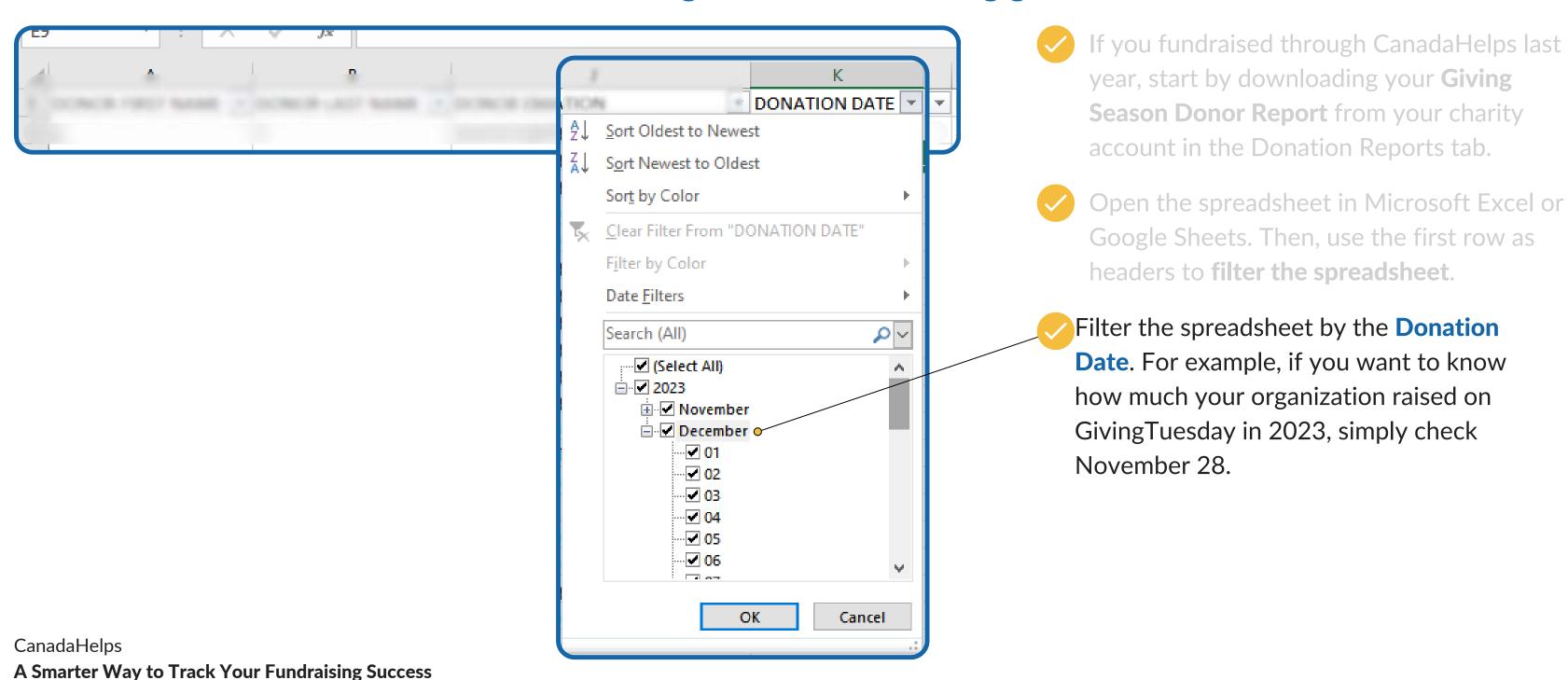


If you fundraised through CanadaHelps last year, start by downloading your **Giving Season Donor Report** from your charity account in the Donation Reports tab.

Open the spreadsheet in Microsoft Excel or Google Sheets. Then, use the first row as headers to **filter the spreadsheet**.

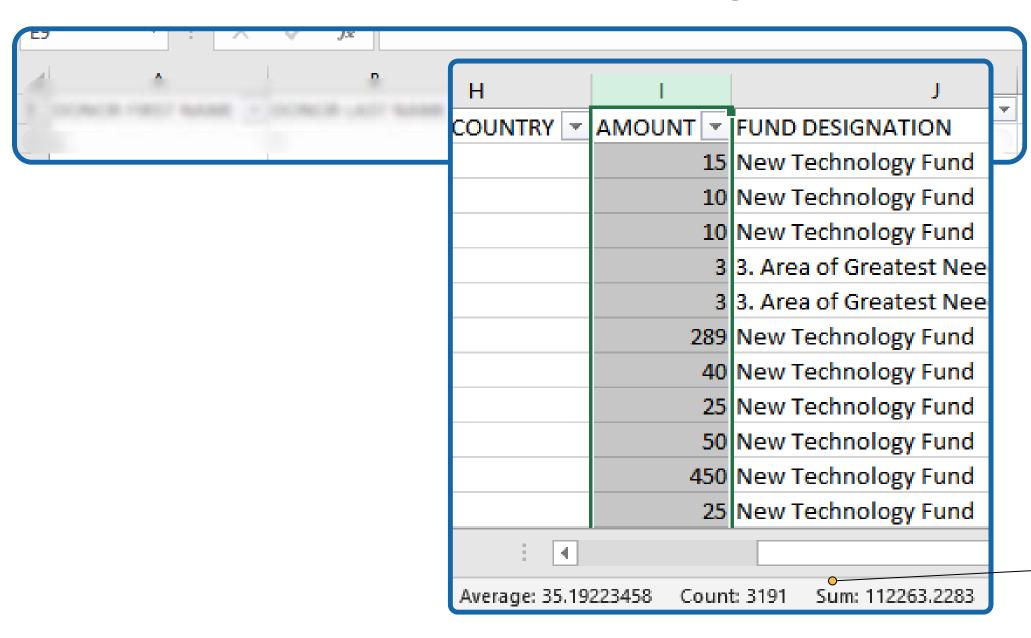
Benchmarking Giving Season Goals

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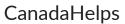
- If you fundraised through CanadaHelps last year, start by downloading your **Giving**Season Donor Report from your charity account in the Donation Reports tab.
- Open the spreadsheet in Microsoft Excel or Google Sheets. Then, use the first row as headers to **filter the spreadsheet**.
- Filter the spreadsheet by the **Donation Date**. For example, if you want to know how much your organization raised on GivingTuesday in 2023, simply check November 28.
- Select the entire **Amount** column and calculate the sum-this number will be our benchmark!

Giving Season Report Results

Here's a summary of the fundraising results from the Giving Season Report spreadsheet.

Goal Name	Duration	Fundraising Benchmark	
Giving Season	November 1 - December 31	\$112,263	
GivingTuesday	December 3	\$895	
December	December 1 - 31	\$40,183	
Last 3 Days of the Year	December 29 - 31	\$807	

Insight: Based on last year's data, there seems to be an opportunity to improve our GivingTuesday and end-of-December fundraising results!



Giving Season Report Results

Here's a summary of the fundraising results from the Giving Season Report spreadsheet.

Goal Name	Duration	Fundraising Benchmark	Number of Donors Benchmark	Number of Donations Benchmark
Giving Season	November 1 - December 31	\$112,263	985	3190
GivingTuesday	December 3	\$895	31	32
December	December 1 - 31	\$40,183	825	1493
Last 3 Days of the Year	December 29 - 31	\$807	34	42

If You Didn't Fundraise With CanadaHelps...

No worries! You can still establish benchmarks using the Giving Season insights we shared in Part 1 of this presentation and your internal organization's data.

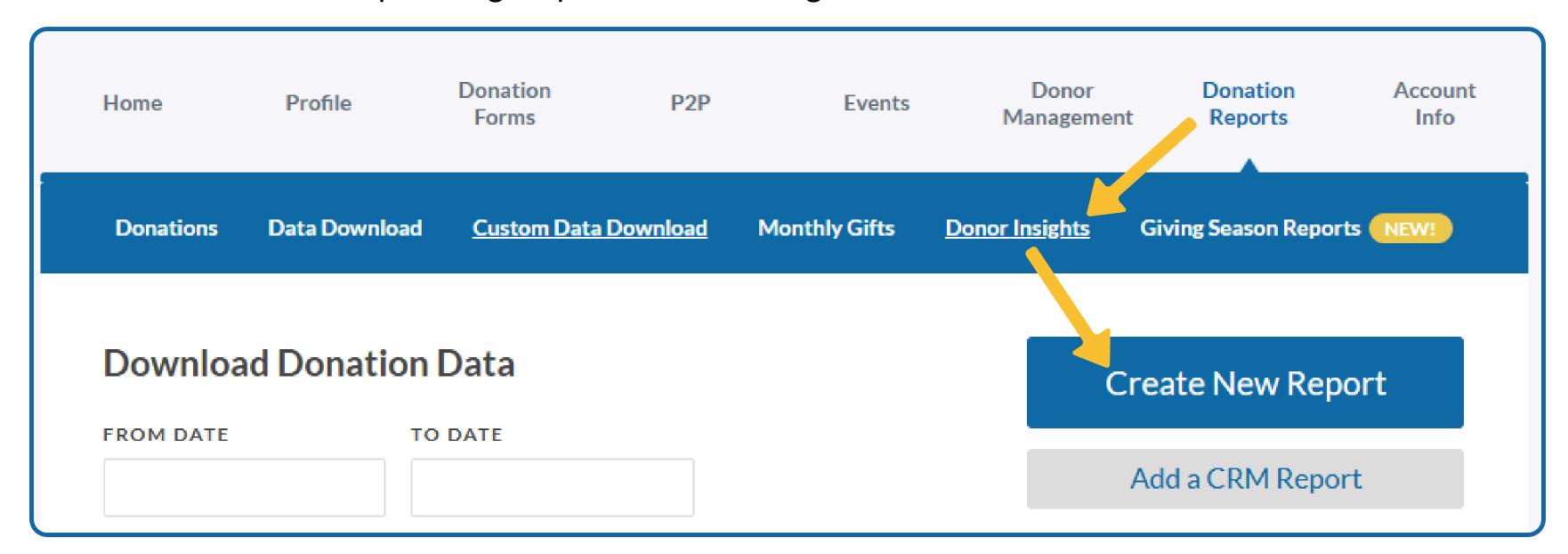


For instance, we shared that GivingTuesday accounts for 3% of charity annual revenue. You can estimate a benchmark by applying this percentage to your organization's performance from last year.

For example:

Post Giving Season Goals

To benchmark metrics after the Giving Season, feel free to use the **Custom Data Download** tool to customize a donation report to get specific fundraising data.



PART 4

Demo: Mastering Your Goal Tracking

How to Track Goals

Now, we'll show you how to add and track one of these goals in your CanadaHelps charity account!

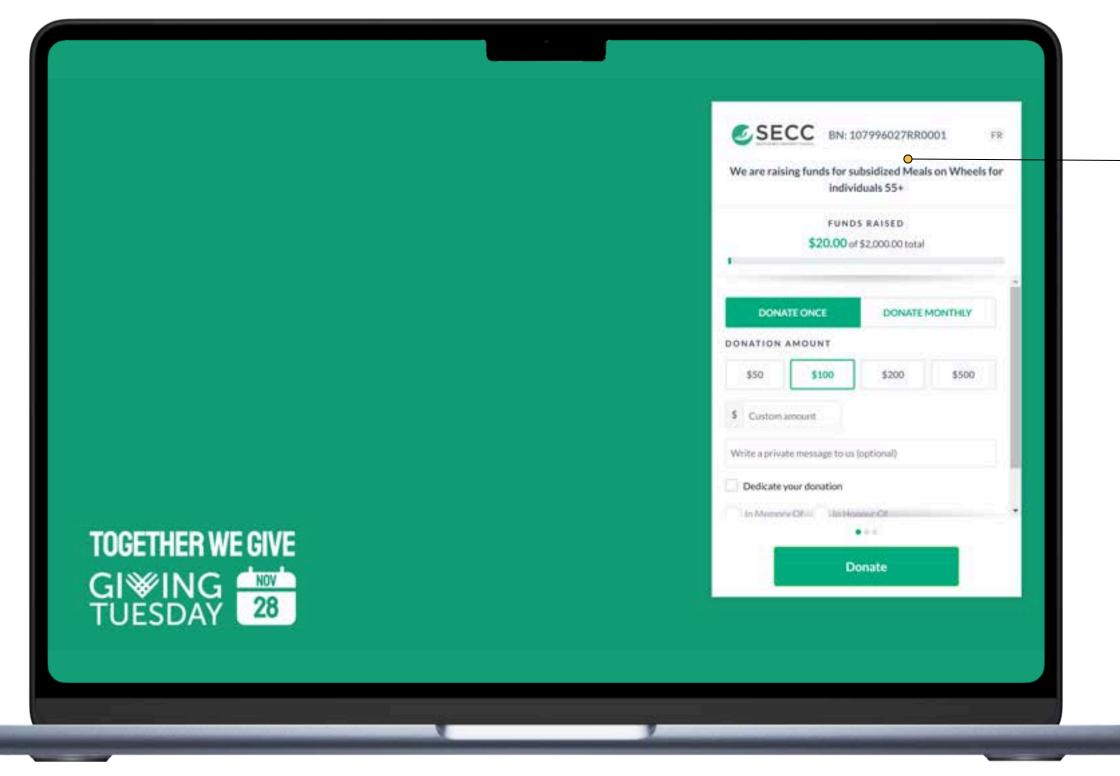
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December	December 1 - 31	\$40,183	825	1493
Last 3 Days of the Year	December 29 - 31	\$807	34	43

PART 5 Progress: Taking Steps Towards Your Goal



Now that you've established a goal, what steps can you take to ensure you're making tangible progress toward achieving it?

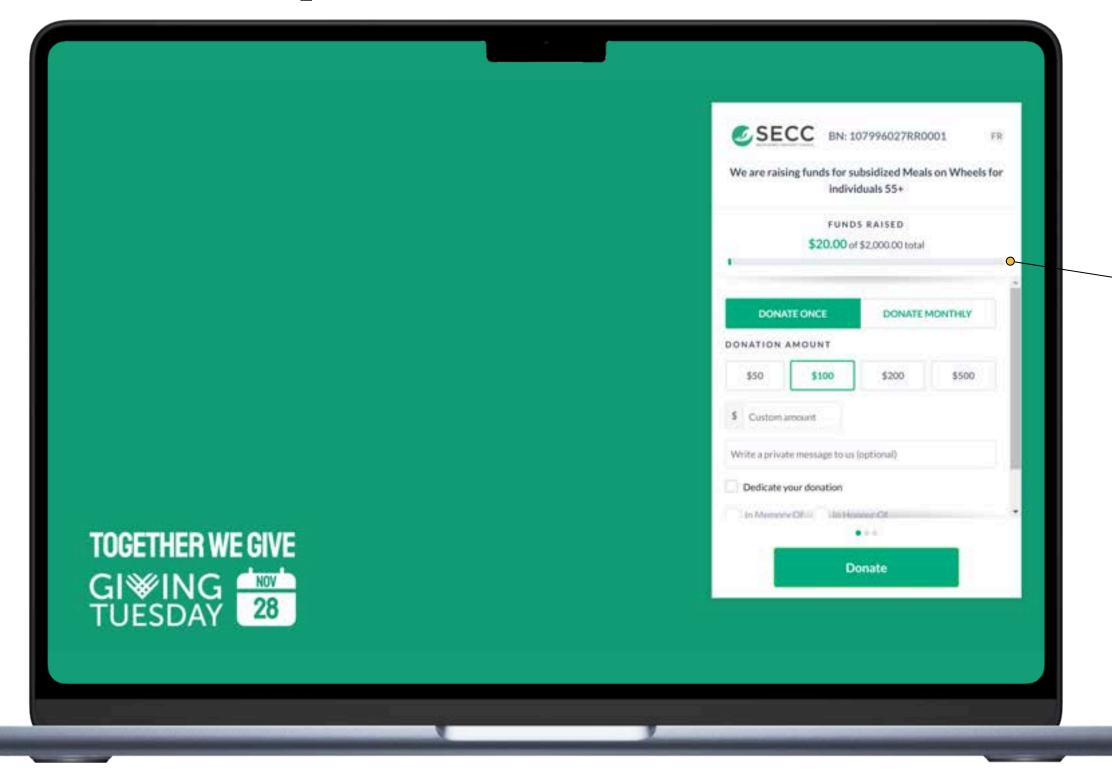
CanadaHelps Donation Forms



Here's an example of a Donation Form that supports a clear, mission-aligned SMART goal.

Specific: Stated the GivingTuesday campaign was to support their Meals on Wheels program.

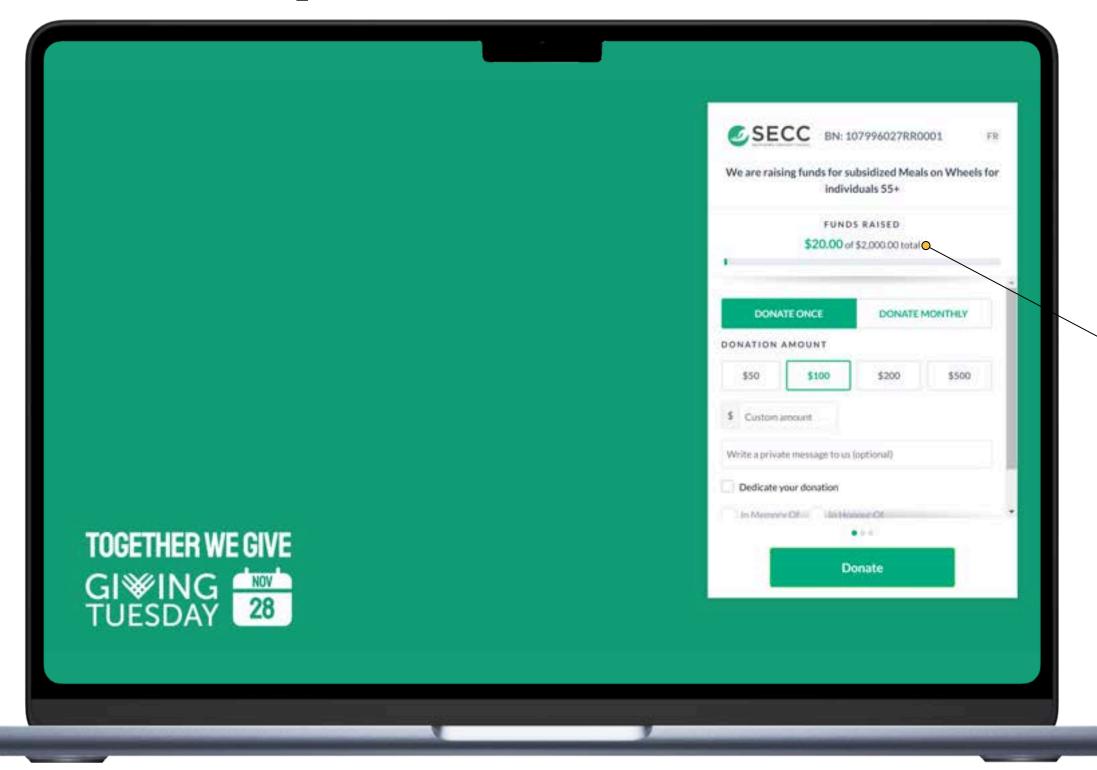
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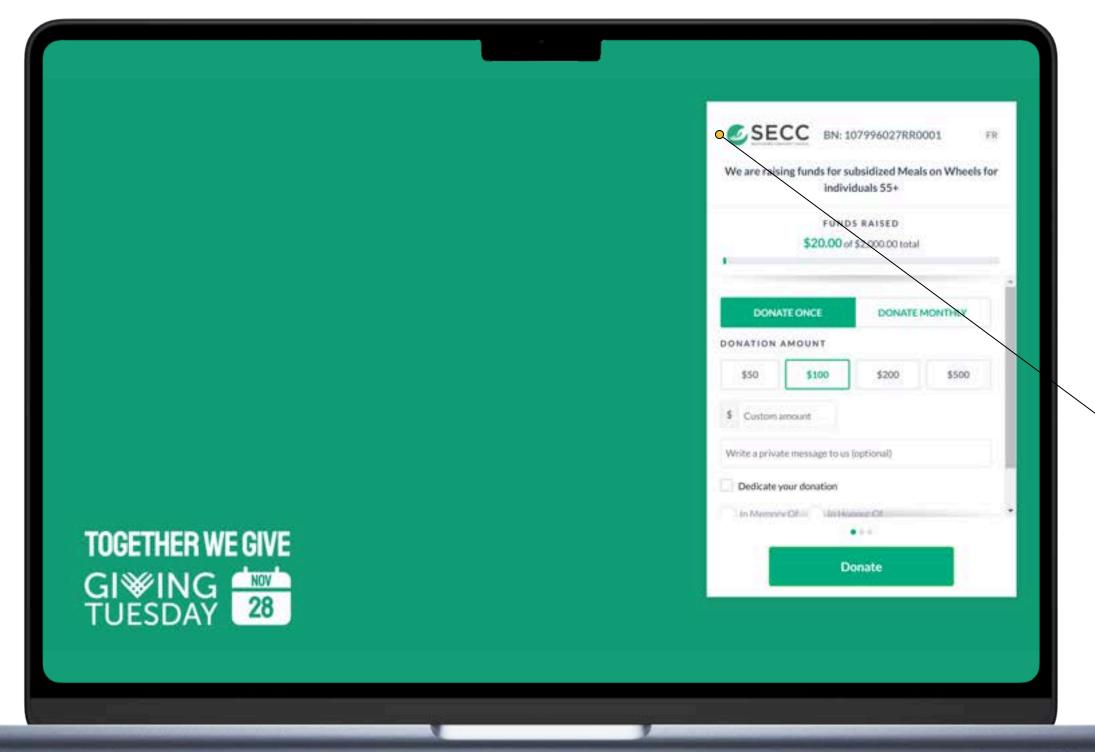
Here's an example of a Donation Form that supports a clear, mission-aligned SMART goal.

- Specific: Stated the GivingTuesday campaign was to support their Meals on Wheels program.
- Measurable: Shows there is a \$2,000 fundraising thermometer.

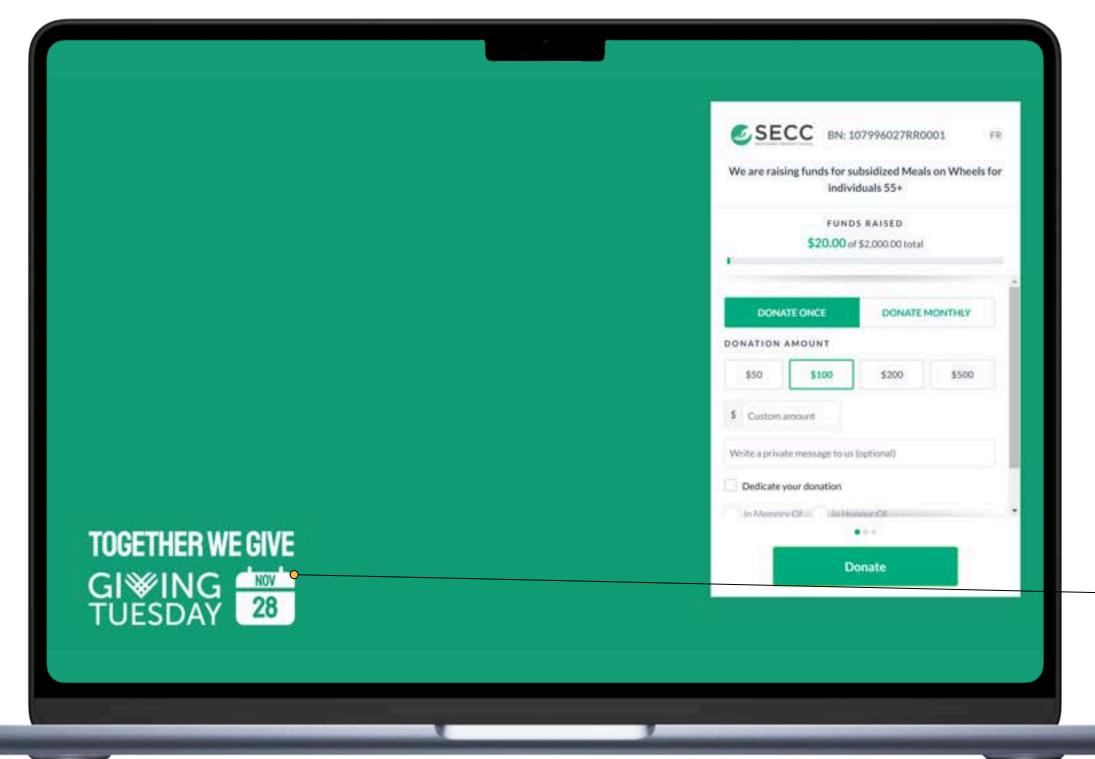
 ${\sf CanadaHelps}$



- Specific: Stated the GivingTuesday campaign was to support their Meals on Wheels program.
- Measurable: Shows there is a \$2,000 fundraising thermometer.
 - **Achievable:** The fundraising goal is well-suited to the program's focus.



- Specific: Stated the GivingTuesday campaign was to support their Meals on Wheels program.
- Measurable: Shows there is a \$2,000 fundraising thermometer.
- Achievable: The fundraising goal is well-suited to the program's focus.
- Relevant: It's aligned with their mission to support the South Essex communities.

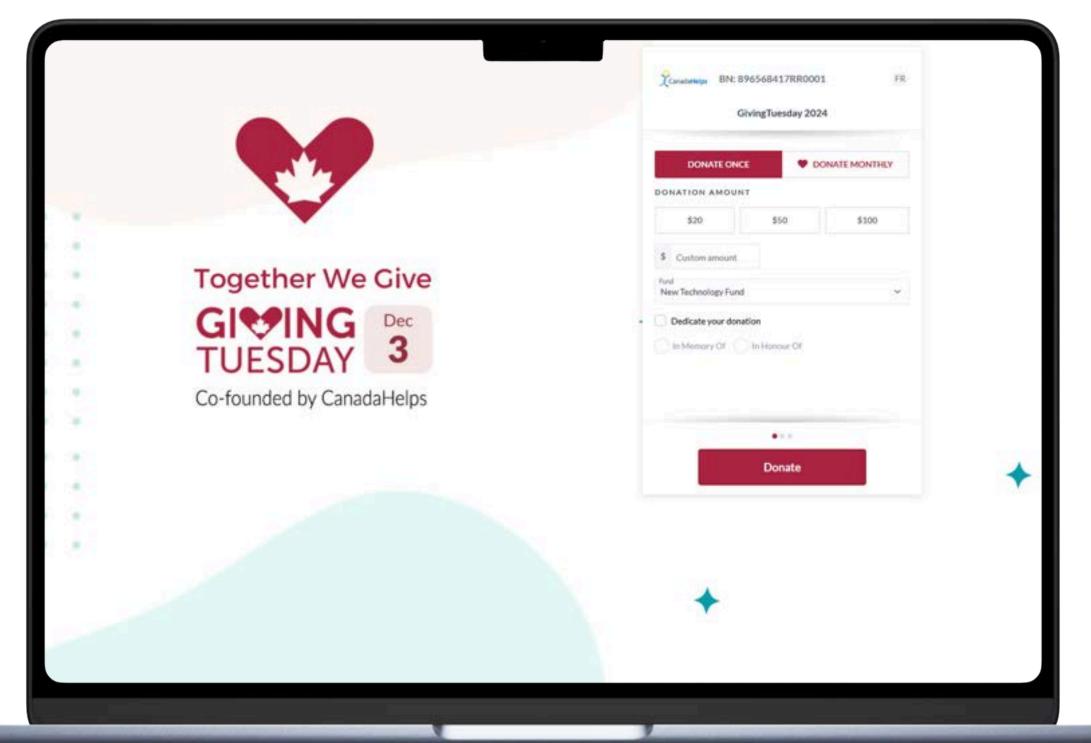


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- Achievable: The fundraising goal is well-suited to the program's focus.
- Relevant: It's aligned with their mission to support the South Essex communities.
- Time-Bound: This campaign specifically ran on GivingTuesday.

Plus, you can customize each form to match **ESECC** BN: 107996027RR0001 your organization's branding and campaigns, We are raising funds for subsidized Meals on Wheels for including GivingTuesday Donation Form Backgrounds, and issue CRA-compliant tax FUNDS RAISED \$20,00 of \$2,000,00 total receipts automatically! DONATE ONCE DONATE MONTHLY DONATION AMOUNT \$500 \$ Custom amount Write a private message to us (optional) Dedicate your donation **TOGETHER WE GIVE** Donate GI**≫ING**

- Specific: Stated the GivingTuesday campaign was to support their Meals on Wheels program.
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- Relevant: It's aligned with their mission to support the South Essex communities.
- Time-Bound: This campaign specifically ran on GivingTuesday.

CanadaHelps Donation Form Backgrounds



Speaking of Donation Form backgrounds, we've provided several free **GivingTuesday** backgrounds to customize your form in time for the big day!

Simply go to the **Donation Forms tab** in your CanadaHelps charity account and download the backgrounds!

The Ultimate End-of-Year Campaign Guide

Develop a Compelling Case for Support That Resonates

Why should donors give to your charity? The answer lies in crafting a compelling and emotive case for support. Your story must strike a chord with donors, making them feel emotionally connected to your cause.

Key Elements of a Strong Case for Support:

- Tell a Story: Share real-life examples of the impact your charity has made.
 Use vivid imagery and personal anecdotes to draw readers in.
- 2. Highlight Urgency: Explain why your cause needs immediate attention.
 What problems are you solving, and what happens if no action is taken?
- 3. Show Impact: Use statistics to demonstrate the tangible outcomes of donations. For instance, "Every \$50 donation helps provide meals for 10 children."

Example Copy

"Imagine a world where your child goes to bed hungry. It's heartbreaking, isn't it? At [Your Charity], we are working tirelessly to change this reality. Last year alone, with the generous support of donors like you, we provided over 20,000 meals to children in need. But there's still so much more to do." Download The Ultimate End-of-Year Guide to get email templates, social media templates, and a sample campaign roadmap. Inside, you'll learn:





The Ultimate

End-Of-Year

The Ultimate End-of-Year Campaign Guide

Craft a Clear and Concise Call-to-Action That Encourages Immediate Giving

Once you've connected emotionally with your audience, it's time to motivate them to act. A clear and concise call-to-action (CTA) is crucial.

Steps to Crafting an Effective CTA:

- Be Direct: Tell your audience exactly what you want them to do. Avoid vague language.
- Create Urgency: Encourage immediate action with phrases like "Donate Now" or "Make a Difference Today."
- 3. Highlight Benefits: Mention how their contribution will make an impact. For example, "Your \$100 donation provides clean water for a family for a month."

CTA Example

"Join us in making a difference. Donate now and help us reach our goal of providing clean water to 500 families by the end of the year. Every dollar counts!"

Download The Ultimate End-of-Year Guide to get email templates, social media templates, and a sample campaign roadmap. Inside, you'll learn:

- How to develop a compelling case that engages supporters and clearly communicates the impact of your mission.
- How to craft a CTA that inspires giving by focusing on the specific impact donors can make and creating a sense of urgency around the campaign.

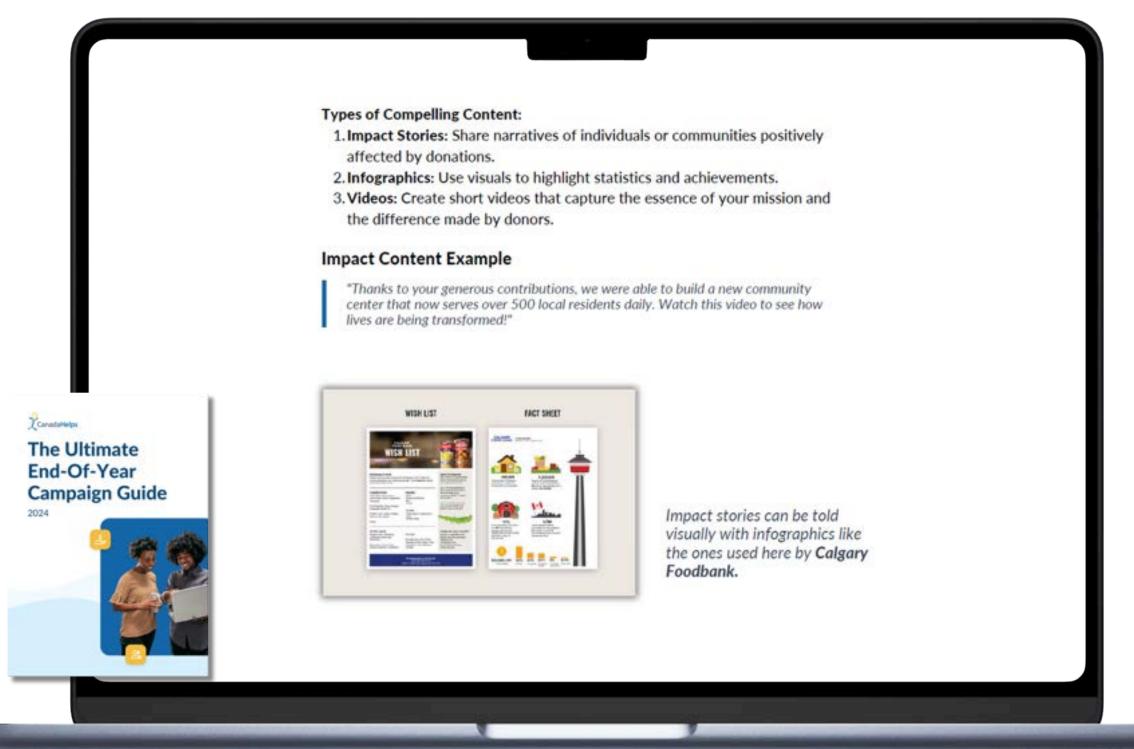


The Ultimate

End-Of-Year

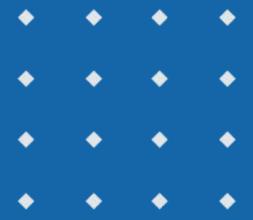
Campaign Guide

The Ultimate End-of-Year Campaign Guide



Download The Ultimate End-of-Year Guide to get email templates, social media templates, and a sample campaign roadmap. Inside, you'll learn:

- How to develop a compelling case that engages supporters and clearly communicates the impact of your mission.
- How to craft a CTA that inspires giving by focusing on the specific impact donors can make and creating a sense of urgency around the campaign.
- How to create engaging content that builds connections with your supporters and motivates their continued commitment to your organization's mission.



PART 6 Iterate: Embracing Continuous Improvement

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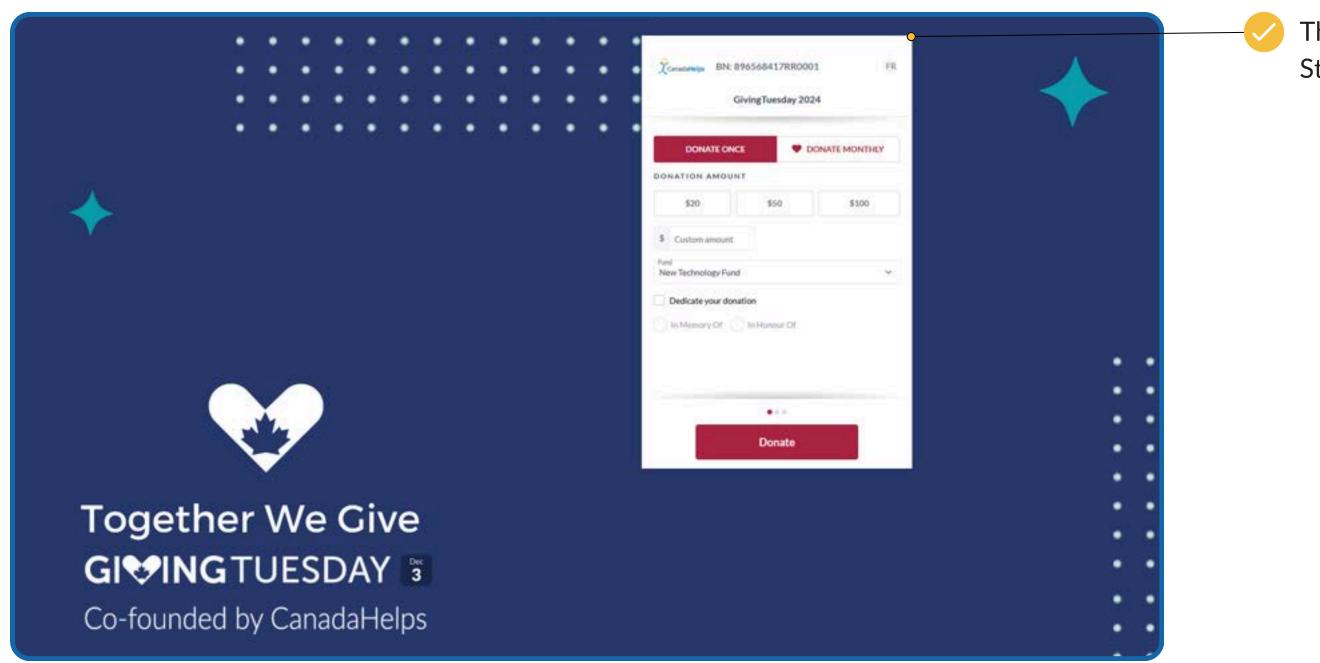
Because it's not just about outcomes, good or bad; it's about the ongoing habit of tracking fundraising data to understand progress and continuously improve strategies.

Insights Into Donor Behaviour

Tracking funds raised, the number of donors, and total donations offers powerful insights into donor behaviours and campaign effectiveness.

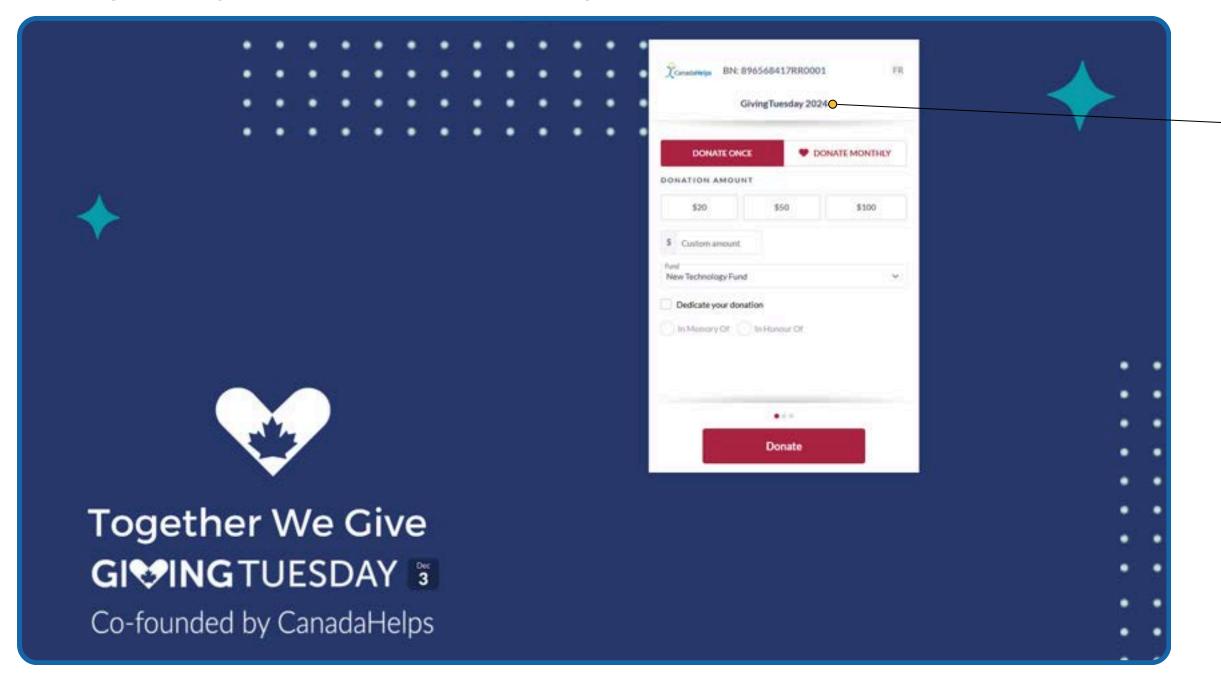
Goal	Insights
Funds Raised	 Rapid progress, especially early on often signals your campaign resonates strongly with donors Slower progress may reveal less enthusiasm or awareness
Number of Donors	 A high number of donors suggests the broad appeal of your campaign A lower count may indicate that a smaller, dedicated group is motivated by the fundraising campaign
Total Donations	 A high number of donations relative to the number of donors could mean donors are making multiple gifts, indicating sustained interest If single donations are more common, it may imply that while the goal resonates, the campaign is best suited for one-time contributions

To improve your Donation Forms, you could test:



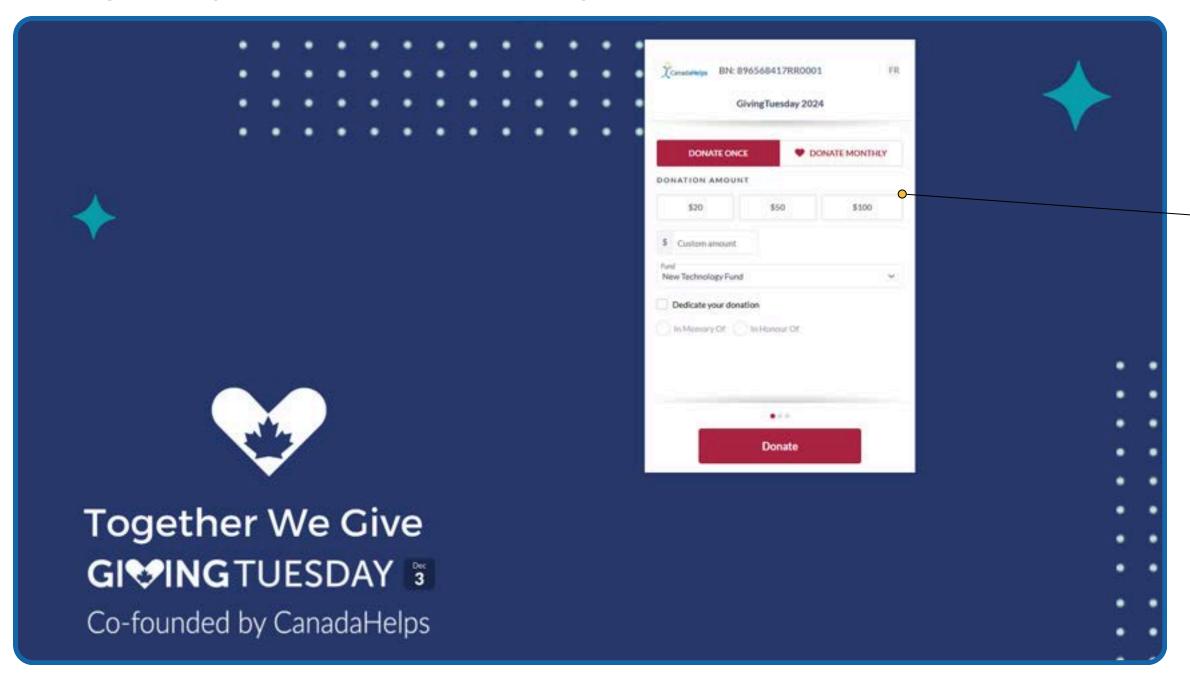
The form type, such as Full, Multi-Step, Securities, or Tribute forms

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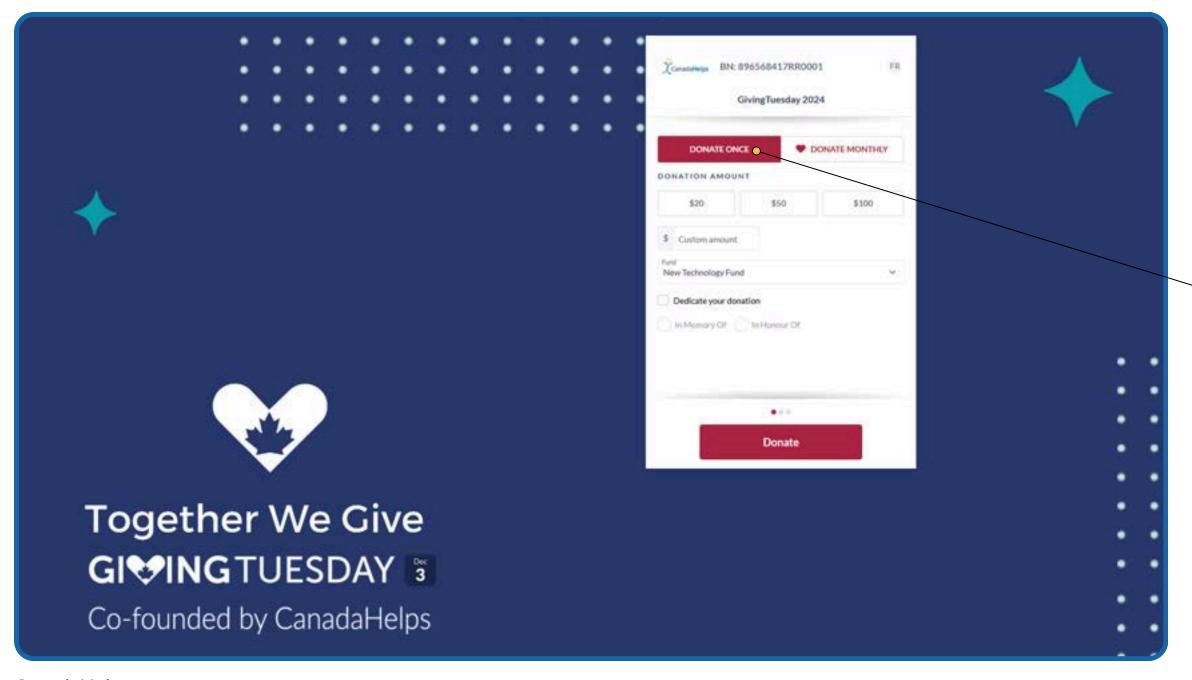


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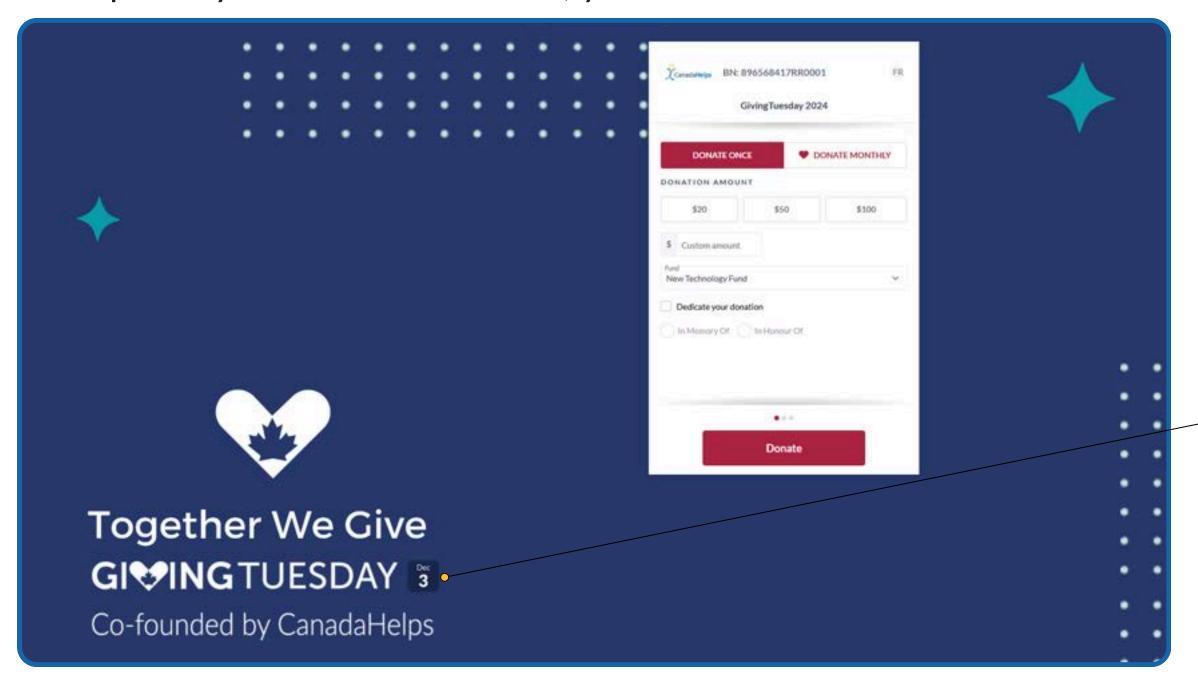
The impact message at the top of the form.



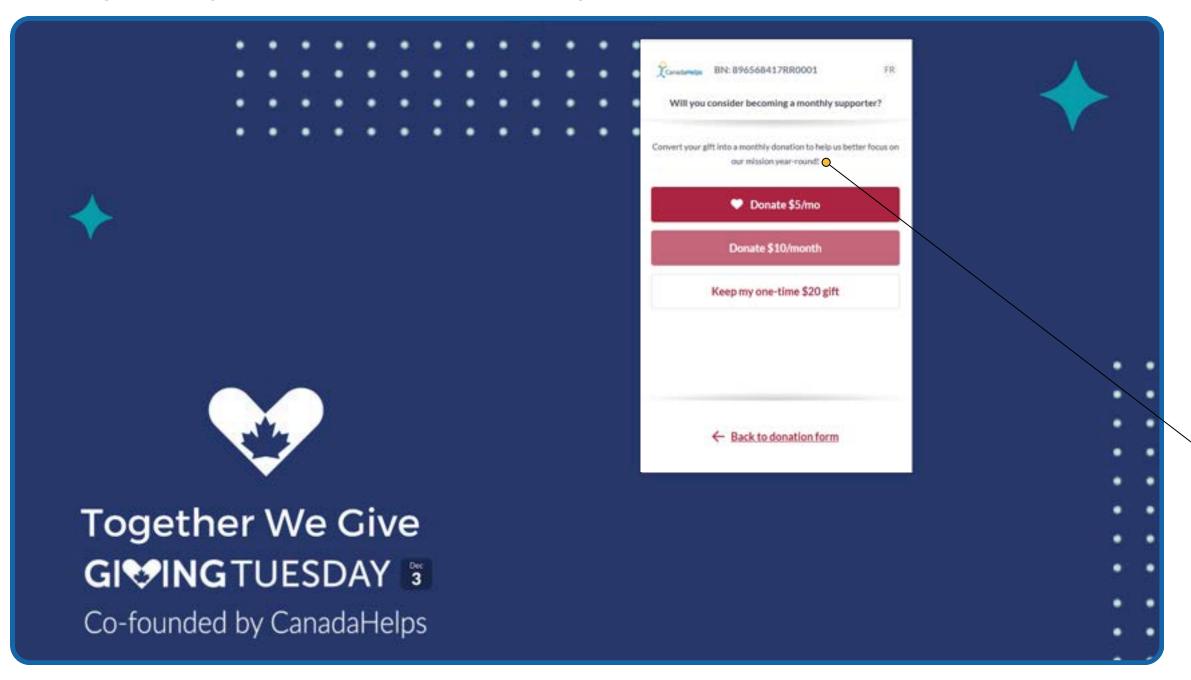
- The form type, such as Full, Multi-Step, Securities, or Tribute forms
- The impact message at the top of the form.
 - Suggested donation amounts or automatic Smart Sums.



- The form type, such as Full, Multi-Step, Securities, or Tribute forms
- The impact message at the top of the form.
- Suggested donation amounts or automatic Smart Sums.
- Different colours that align with your brand or campaign.

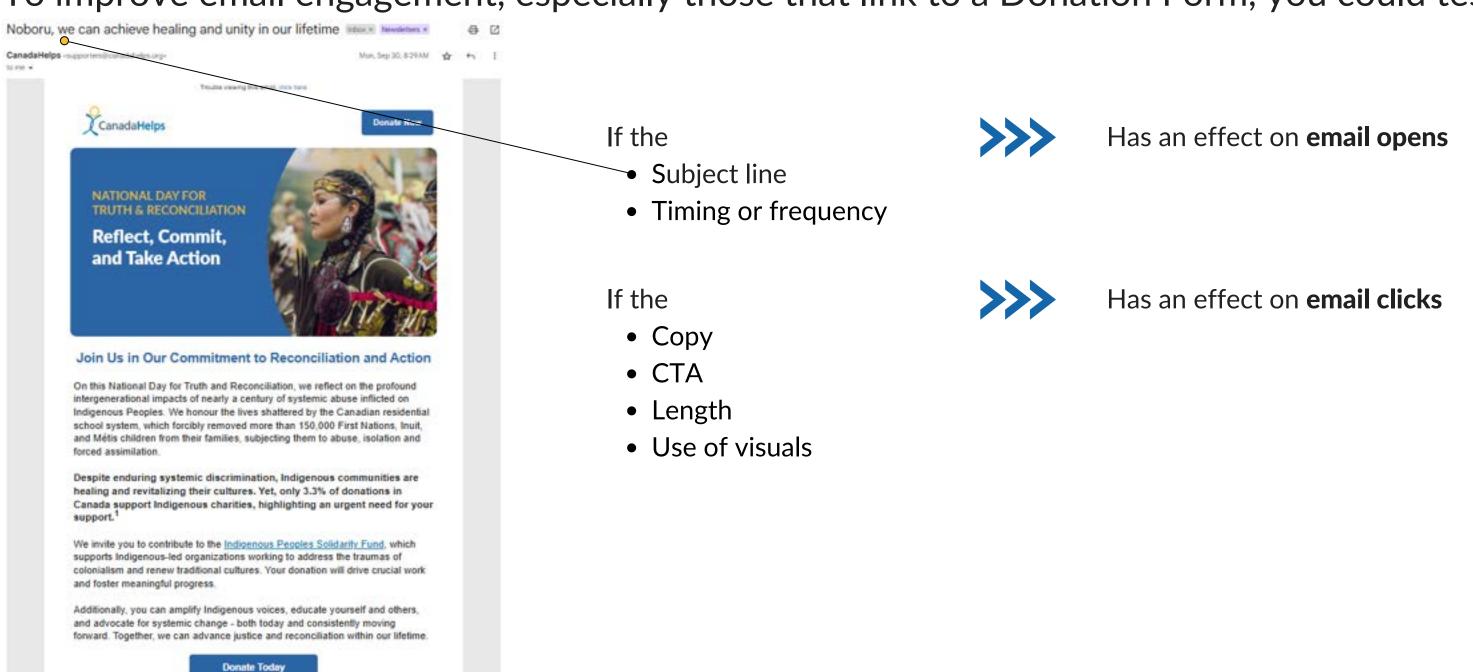


- The form type, such as Full, Multi-Step, Securities, or Tribute forms
- The impact message at the top of the form.
- Suggested donation amounts or automatic Smart Sums.
- Different colours that align with your brand or campaign.
- A background that matches with your fundraising campaign.



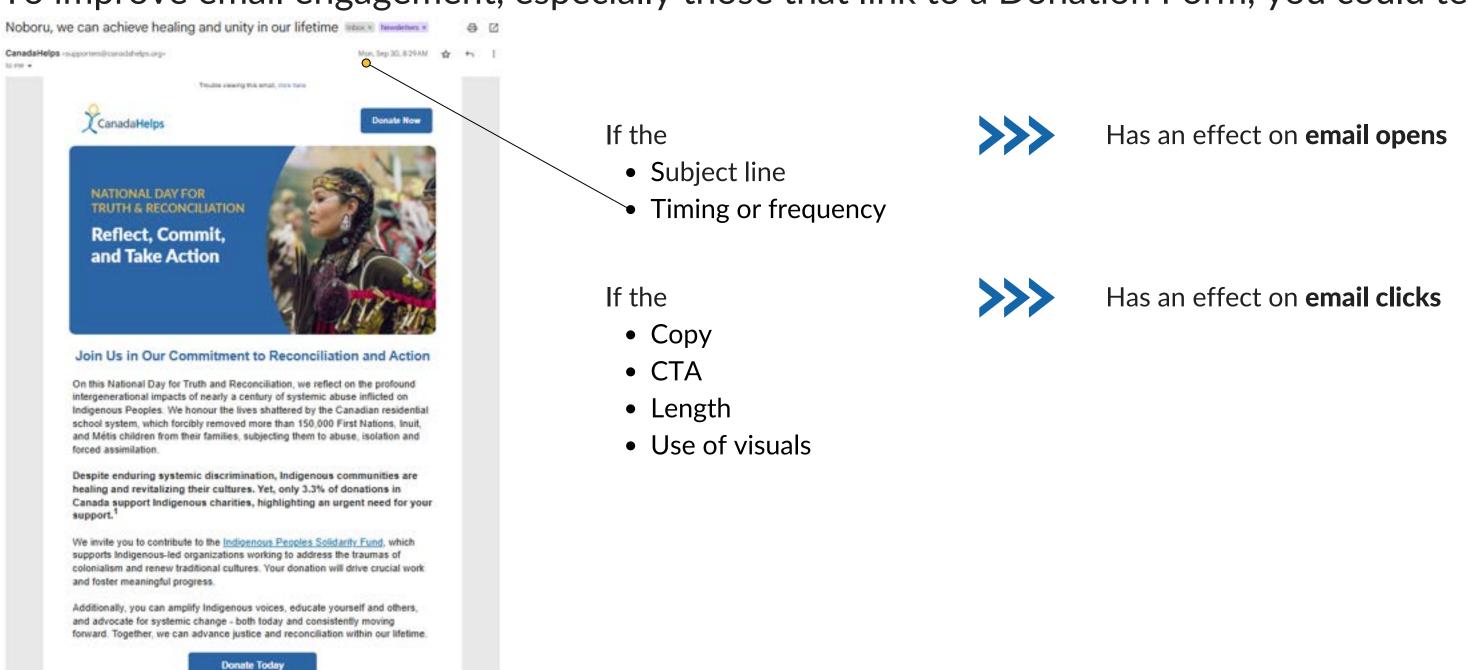
- The form type, such as Full, Multi-Step, Securities, or Tribute forms
- The impact message at the top of the form.
- Suggested donation amounts or automatic Smart Sums.
- Different colours that align with your brand or campaign.
- A background that matches with your fundraising campaign.
- The built-in prompt encourages the donor to convert their one-time gift to a monthly gift.

To improve email engagement, especially those that link to a Donation Form, you could test:



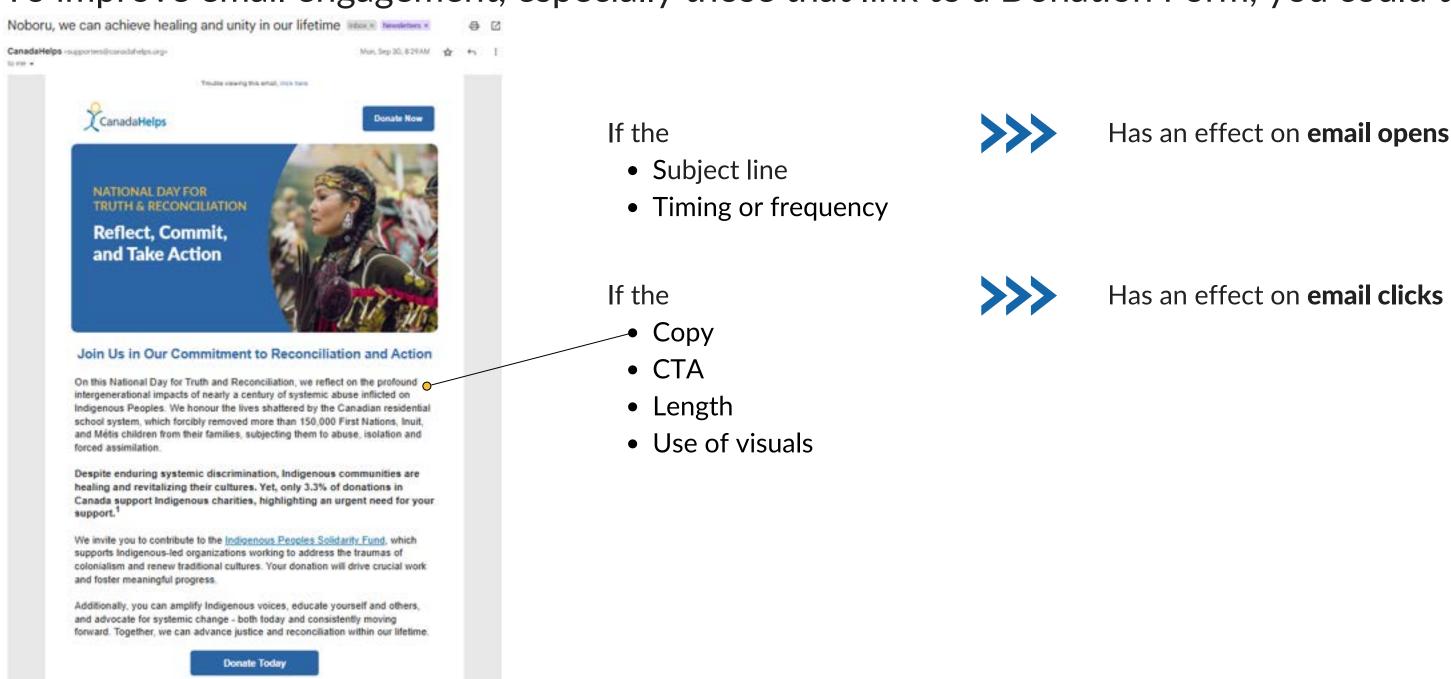
CanadaHelps

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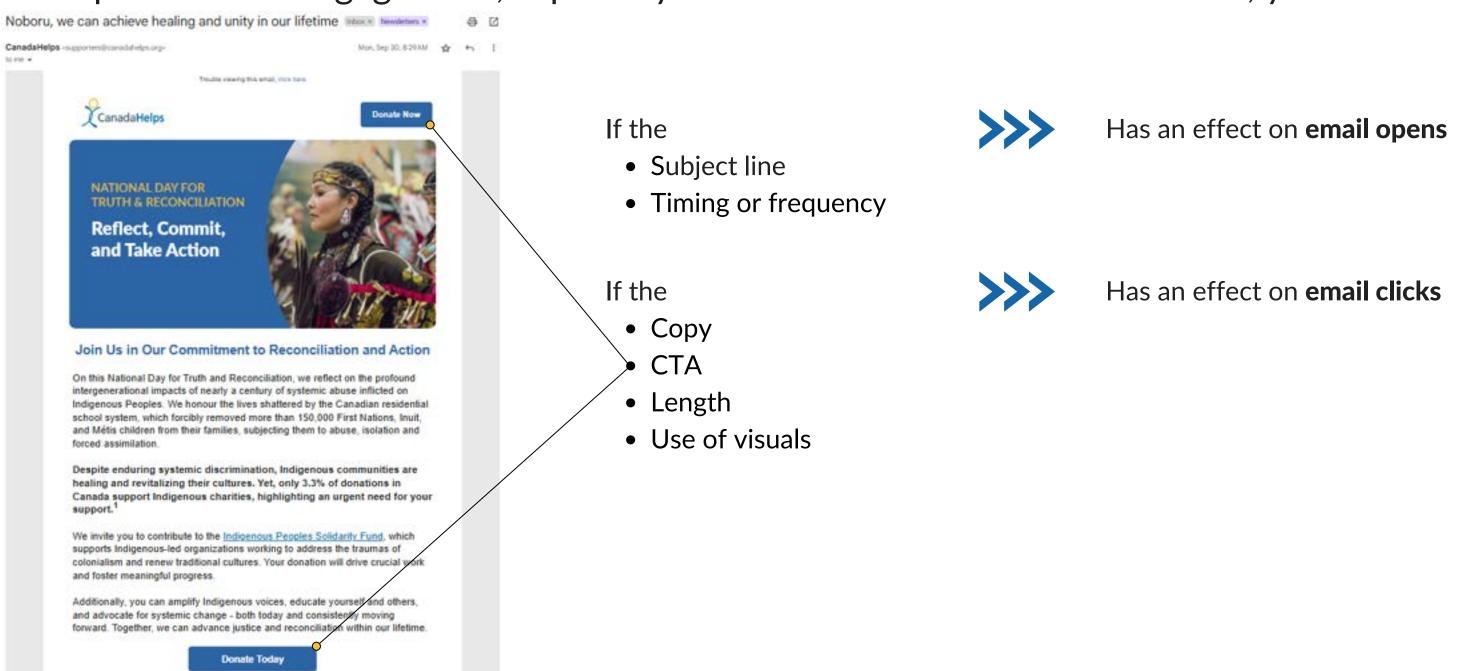
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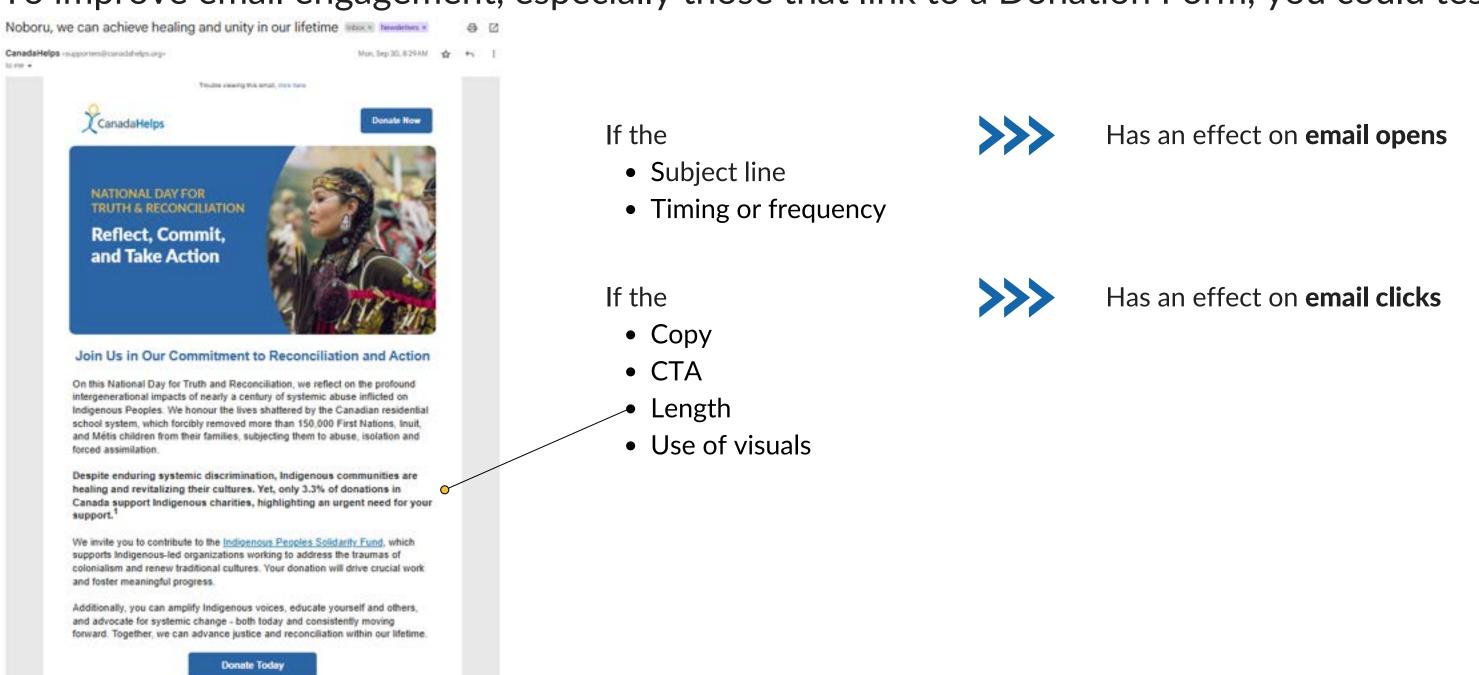
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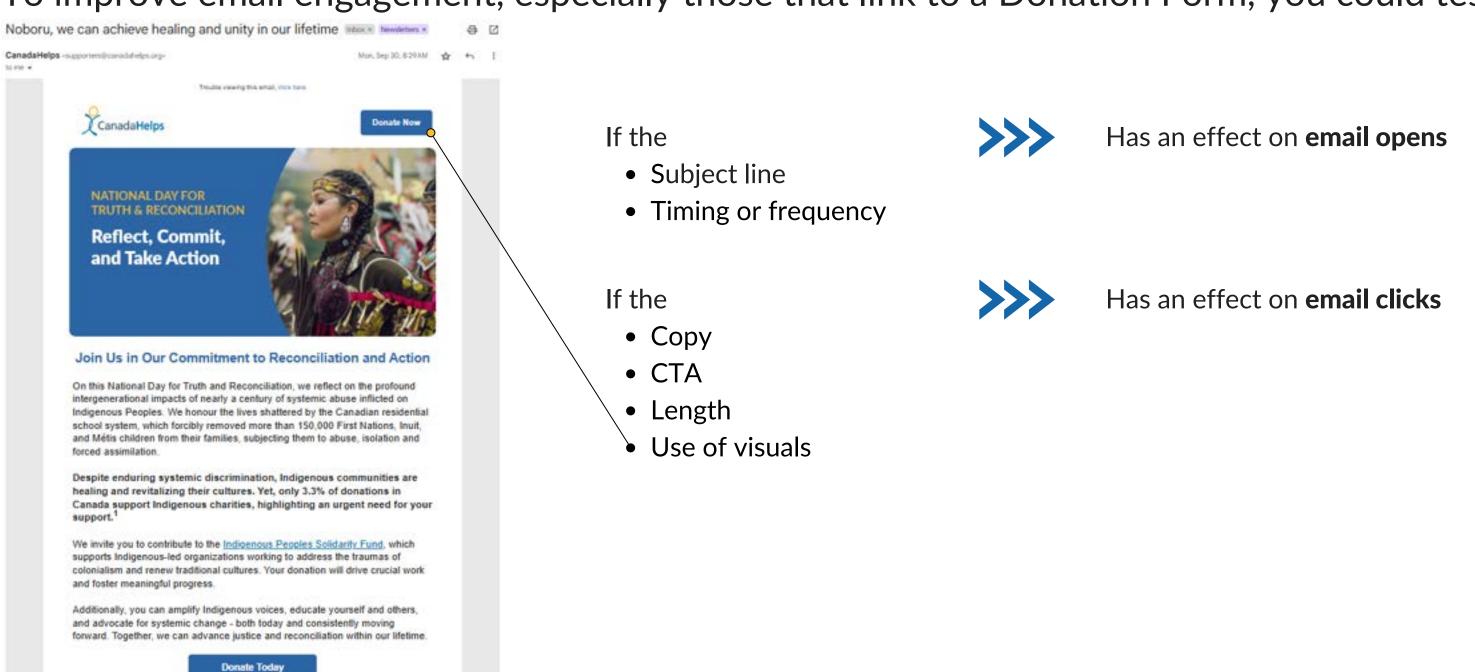
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CanadaHelps

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CanadaHelps

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Recap: Key Takeaways

- Set Clear and Relevant Goals or SMART Goals
- Utilize Data for Informed Decisions
- Engage and Motivate Your Team
- Consistency is Key
- Leverage the Key Fundraising Period
- Iterate on Your Results for Next Time



Q&A



Contact Us

info@canadahelps.org 1-877-755-1595 www.canadahelps.org @CanadaHelps









