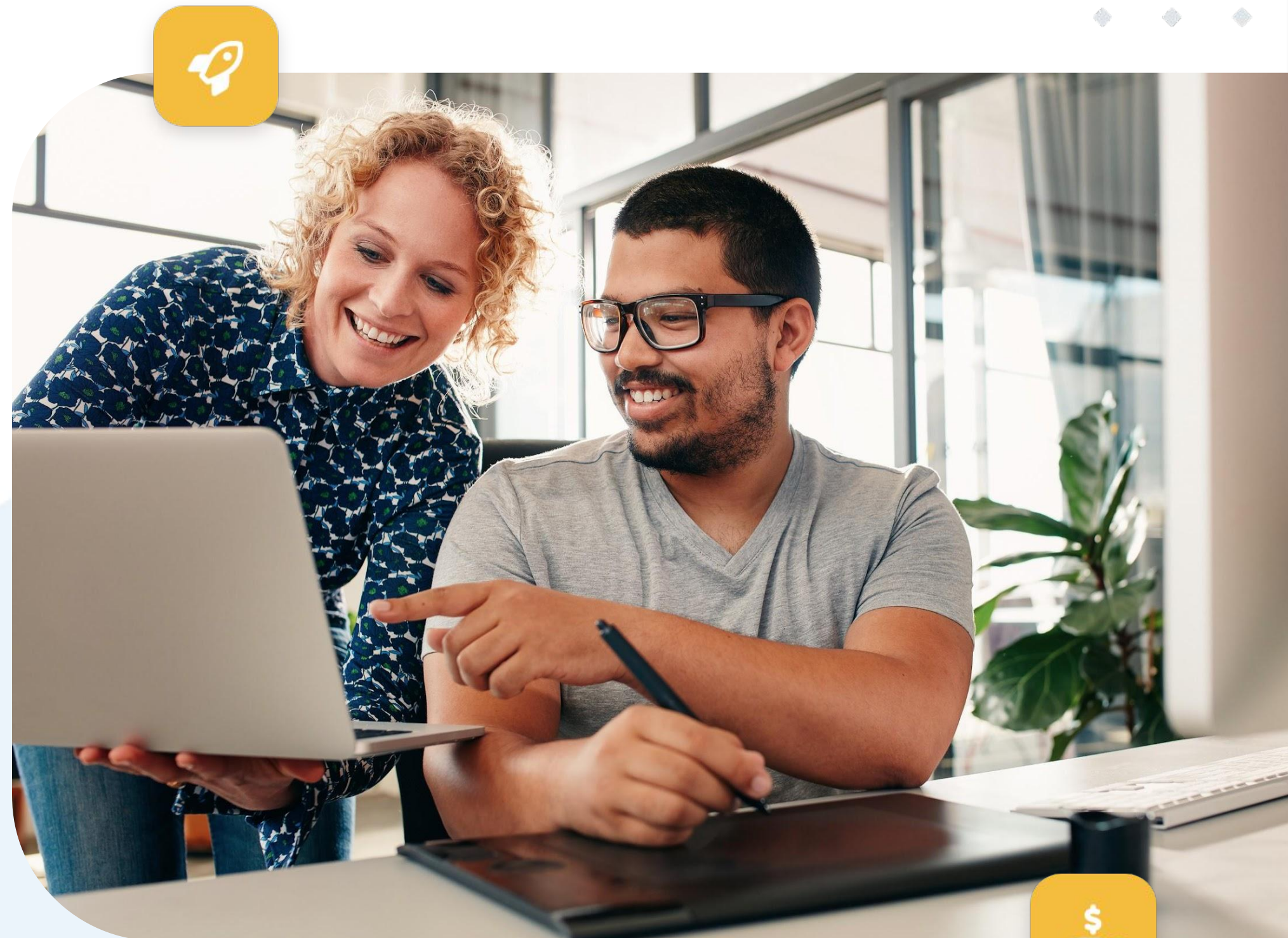




# CanadaHelps Foundations Webinar



SPEAKERS:



Denis Romanov

Digital Specialist, Charity Success



# 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.

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# 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.

# About the Presenter



**Denis Romanov**

**Digital Specialist, Charity Success | CanadaHelps**

Since joining CanadaHelps in 2018, Denis has been fortunate to work with hundreds of charities across the charitable sector. Relying on his experience with digital fundraising tools and understanding of charities' needs, Denis is passionate about helping charities advance and succeed in the digital age.





# Agenda

1. Leveraging Your Data: CanadaHelps Donor Insights
2. Engaging With Donors: Thank You Tool
3. Monthly Giving: Updated Monthly Gift Management
4. Optimizing Your Website for Online Donations: Customizable Donation Forms
5. Q&A

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## PART 1

# Leveraging Your Data: Donor Insights





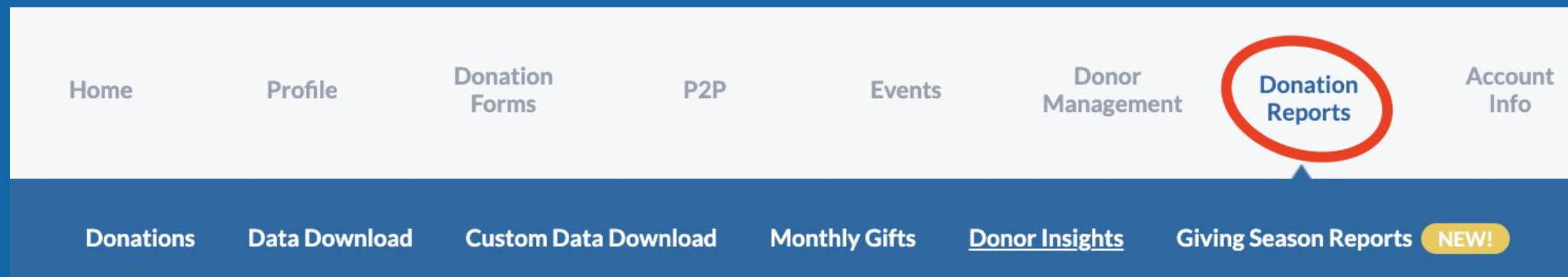
## Why is analyzing your data important?

1. Understanding your donors to better engage with them, retain them and identify more opportunities.
2. Optimizing your fundraising – seeing which efforts work and which don't.
3. Budgeting – forecasting based on historical data.
4. Improving digital marketing strategies.





When CanadaHelps processes online donations for your charity, all the data that we collect for you is saved in the Donation Reports section of your charity account.



- **Donations** is where you can find the summary of your most recent donations, search for any gift within last 5 years and download your disbursement reports.
- **Data Download** allows you to export the details of every donation for a given period.
- **Custom Data Download** allows you to create a custom report, including only the desired fields (e.g. for accounting purposes).
- **Donor Insights** provide donor and revenue metrics against sector benchmarks to help you make strategic decisions for your charity.

[Home](#)[Profile](#)[Donation Forms](#)[P2P](#)[Events](#)[Donor Management](#)[Donation Reports](#)[Account Info](#)

[Donations](#)[Data Download](#)[Custom Data Download](#)[Monthly Gifts](#)[Donor Insights](#)[Giving Season Reports](#)NEW!

## Donor Insights

Use donor and revenue metrics against sector benchmarks to make strategic decisions for your charity

**Report Types:**

**YOUR DONOR METRICS REPORT**

Evaluate performance month over month, year over year, and year-to-date for new and repeat donors.

**DONOR BENCHMARKS**

Compare your charity's donor metrics with the Canadian charitable sector or charities in your specific category.

**REVENUE BENCHMARKS**

Understand the make-up of your donation revenue and compare with the Canadian charitable sector or charities in your specific category.

[View Donor Insights](#)

Past 24 months data (CSV file):

[Download Insight Reports](#)



	Donor Metrics	Sector Benchmarks - Donor Metrics				Sector Benchmarks - Revenue Metrics							
Donor Metrics - February 2025													
Performance in February 2025 vs. February 2024													
	New Donors				Repeat Donors				Total Donors				
	Number of New Donors	Amount of Donations (New Donors)	Number of Donations (New Donors)	Average Donation (New Donors)	Number of Repeat Donors	Amount of Donations (Repeat Donors)	Number of Donations (Repeat Donors)	Average Donation (Repeat Donors)	Total Number of Donors	Amount of Donations (Total Donors)	Number of Donations (Total Donors)	Average Donation (Total Donors)	
February 2025	4536	\$39216.30	4695	\$8.35	7182	\$138207...	8871	\$15.58	11718	\$177423...	13566	\$13.08	
February 2024	4303	\$39689.24	4448	\$8.92	5692	\$69531.76	7168	\$9.70	9995	\$109221...	11616	\$9.40	
% Change	5.42%	-1.19%	5.55%	-6.39%	26.18%	98.77%	23.76%	60.61%	17.24%	62.45%	16.79%	39.10%	
Performance in February 2025 vs. January 2025													
	New Donors				Repeat Donors				Total Donors				
	Number of New Donors	Amount of Donations (New Donors)	Number of Donations (New Donors)	Average Donation (New Donors)	Number of Repeat Donors	Amount of Donations (Repeat Donors)	Number of Donations (Repeat Donors)	Average Donation (Repeat Donors)	Total Number of Donors	Amount of Donations (Total Donors)	Number of Donations (Total Donors)	Average Donation (Total Donors)	
February 2025	4536	\$39216.30	4695	\$8.35	7182	\$138207...	8871	\$15.58	11718	\$177423...	13566	\$13.08	
January 2025	4529	\$33754.21	4676	\$7.22	6715	\$73335.52	8320	\$8.81	11244	\$107089...	12996	\$8.24	
% Change	0.16%	16.18%	0.41%	15.71%	6.96%	88.46%	6.62%	76.75%	4.22%	65.68%	4.39%	58.72%	

Performance in 2025 Year to Date vs 2024 Year to Date

	New Donors				Repeat Donors				Total Donors			
	Number of New Donors	Amount of Donations (New Donors)	Number of Donations (New Donors)	Average Donation (New Donors)	Number of Repeat Donors	Amount of Donations (Repeat Donors)	Number of Donations (Repeat Donors)	Average Donation (Repeat Donors)	Total Number of Donors	Amount of Donations (Total Donors)	Number of Donations (Total Donors)	Average Donation (Total Donors)
2025 YTD	11048	\$89643.99	11633	\$7.71	13913	\$240642...	20514	\$11.73	24961	\$330286...	32147	\$10.27
2024 YTD	10738	\$194810...	11291	\$17.25	11412	\$173695...	17601	\$9.87	22150	\$368505...	28892	\$12.75
% Change	2.89%	-53.98%	3.03%	-55.34%	21.92%	38.54%	16.55%	18.87%	12.69%	-10.37%	11.27%	-19.45%

**New Donor:** Donors in this group have made their first donation to your charity using CanadaHelps since our launch.

**Repeat Donor:** Donors in this group have given to your charity using CanadaHelps at least once since our launch.



Sector Benchmarks - Donor Metrics

This report compares your charity's average performance to that of all charities and all charities in your category(ies). For example, for the average donation amount comparison, if your average donation amount is \$100 and the average donation amount for all charities is \$80, a +20% average donation value would be reported.

Performance in February 2025 vs. Other Charities

		Average Donation (New Donors)	Average Donation (Repeat Donors)	Average Donation (Total Donors)
vs All Charities in Canada		-96.42%	-85.58%	-90.28%
vs Own Category in Canada	Indigenous Peoples	-86.58%	-64.40%	-73.06%
	Public Benefit	-95.17%	-82.77%	-88.22%

Performance in 2025 Year to Date vs. Other Charities

		Average Donation (New Donors)	Average Donation (Repeat Donors)	Average Donation (Total Donors)
vs All Charities in Canada		-96.22%	-88.24%	-91.62%
vs Own Category in Canada	Indigenous Peoples	-84.43%	-66.57%	-73.65%
	Public Benefit	-94.73%	-85.77%	-89.62%

Your Average Donation Amount Compared to That of Other Charities: February 2025





PART 2

# Engaging With Your Donors: Thank You







## Why It's Important to Thank Donors

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- **Loyalty & Retention** – Donors who feel appreciated are more likely to continue giving, including new **and** long-standing monthly donors.
- **Emotional Connection** – A sincere thank-you reminds donors of the impact they're making, deepening their connection to the cause.
- **Encouraging Future Donations** – Donors who feel valued are more likely to donate again and even increase their contributions.



## Why It's Important to Thank Donors

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- According to [the study done by the AFP's Fundraising Effectiveness Project](#), the average donor retention rate is around 44%.
- 56% of donors don't make a second donation.
- Thanking donors is an easy step towards higher donor retention.
- Donors who receive a thank-you within 48 hours are [4x more likely](#) to give again!



## Two ways to thank donors through CanadaHelps



**Option 1.** Set up an automated thank you message that will be sent to all donors who make a gift through your **Donation Form**.



**Option 2.** Send personalized thank you messages in the **Donations** section of your account.



Donation Reports > Donations > Donation Summary > Say Thanks

Donations

Data Download

Custom Data Download

Monthly Gifts

Donor Insights

Giving Season Reports

NEW!

Total Donations

1,092,135 donations totalling \$40,229,831.13

Donations To Be Disbursed ⓘ

88,899 donations totalling \$2,071,326.47 on March 13, 2025

Disbursed Donations

Showing disbursements for: MONTH: March YEAR: 2025

Disbursement Date ▾	Amount ▾	Donations ▾
07/03/2025	\$574,407.60	6395

Donation Summary

View 'To Be Disbursed' Details

SEARCH RESULTS INCLUDE DONATIONS MADE IN THE LAST FIVE YEARS.

Search for a donor

Search

STATUS	DATE	NAME	EMAIL	SOURCE	FUND DESIGNATION	DONATION AMOUNT	ACTIONS ⓘ Learn more
	13/03/2025	automated test	<a href="#">Copy Email</a>		New Technology Fund	\$3.00	<div><div> SAY THANKS</div><div> RESEND TAX RECEIPT</div></div>
	13/03/2025	automated test	<a href="#">Copy Email</a>		New Technology Fund	\$3.00	<div><div> SAY THANKS</div><div> RESEND TAX RECEIPT</div></div>
	13/03/2025	automated test	<a href="#">Copy Email</a>		New Technology Fund	\$3.00	<div><div> SAY THANKS</div><div> RESEND TAX RECEIPT</div></div>

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otalling \$40,229,831.13

Disbursed ⓘ

lling \$2,071,326.47 on Marc

Donation Summary

View 'To Be Disbursed' Details

STATUS	DATE				
	13/03/2025	automated test	<a href="#">Copy Email</a>	New Technology Fund	\$3.00
	13/03/2025	automated test	<a href="#">Copy Email</a>	New Technology Fund	\$3.00
	13/03/2025	automated test	<a href="#">Copy Email</a>	New Technology Fund	\$3.00

Send A Thank You Message

TO\*

samartht+donorswsfr@canadahelps.org

YOUR NAME\*

Enter the sender's name that will appear in the donor's Inbox

Denis Romanov

REPLY-TO\*

Enter the email address your recipient will reply to

denisr@canadahelps.org

BCC

tamarar@canadahelps.org

SUBJECT\*

Thank you for your donation, Samarth!

MESSAGE\*

↶ ↷ Formats **B** *I* U 🔗

Dear Samarth,

Thank you so much for your generous donation. We appreciate your ongoing support.

Did you know that next month we're hosting a fundraising event? Let me know if you are interested to attend and I can send you more details. We'd love to see you there!

Warm regards,

Denis

2716 characters remaining (includes hidden HTML)

Cancel

Send Message

Dist

Donations ▾

6395

MADE IN THE LAST FIVE YEARS.

Search

ACTIONS ⓘ Learn more

SAY THANKS

RESEND TAX RECEIPT

SAY THANKS

RESEND TAX RECEIPT




SAY THANKS

RESEND TAX RECEIPT





Once you send your thank you message, the envelope icon will turn green. You can always click on it again to view the content of the message.

	30/09/2021	Jane Doe	<a href="#">Copy Email</a>	Donation Form	2. Bike-a-thon Fund	\$100.00 MONTHLY	 MESSAGE SENT	 RESEND TAX RECEIPT
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PART 3

# Monthly Giving: Updated Monthly Gift Management Tool





Monthly donations are crucial because they are **a source of predictable income** for charities.

**It costs 10x more to acquire new donors than it does to retain existing ones.** Monthly donors, once acquired, provide ongoing support without requiring repeated fundraising efforts.

**Monthly giving fosters deeper engagement**, turning casual donors into long-term supporters who feel more connected to your cause.



# Monthly Gift Management: Updates

- ✓ **Update monthly gift settings** on behalf of your donors in just seconds, enhancing the end-to-end donor experience.
- ✓ **Instantly sort, search and access** all the monthly gifts to your organization from one convenient page, streamlining your admin tasks for greater ease and efficiency.
- ✓ **Cancel, pause, and resume monthly gifts** in a few clicks, providing donors with flexible options that cater to their giving preferences.
- ✓ **Automate email reminders**, adjust the gift schedule, and enjoy other features designed to simplify your monthly management process!



# PART 4

## Optimizing Your Website for Online Donations: Customizable Donation Forms





## Why is it important to have a **donation form** embedded on your website?

### 1. Custom branding & messaging

Your donation form can be tailored with your branding (logo & colours), impact story and an automated branded thank you message.

### 2. Trust and credibility

Donors are more likely to give when they see a professional, secure, and branded donation form directly on your website rather than being redirected to an external page.

### 3. Increasing conversion

If donors have to leave your website to complete a donation, they might get distracted or hesitate. A seamless, on-site donation form keeps donors engaged and improves conversion rates. Donors will remain on your website after their donation is completed.

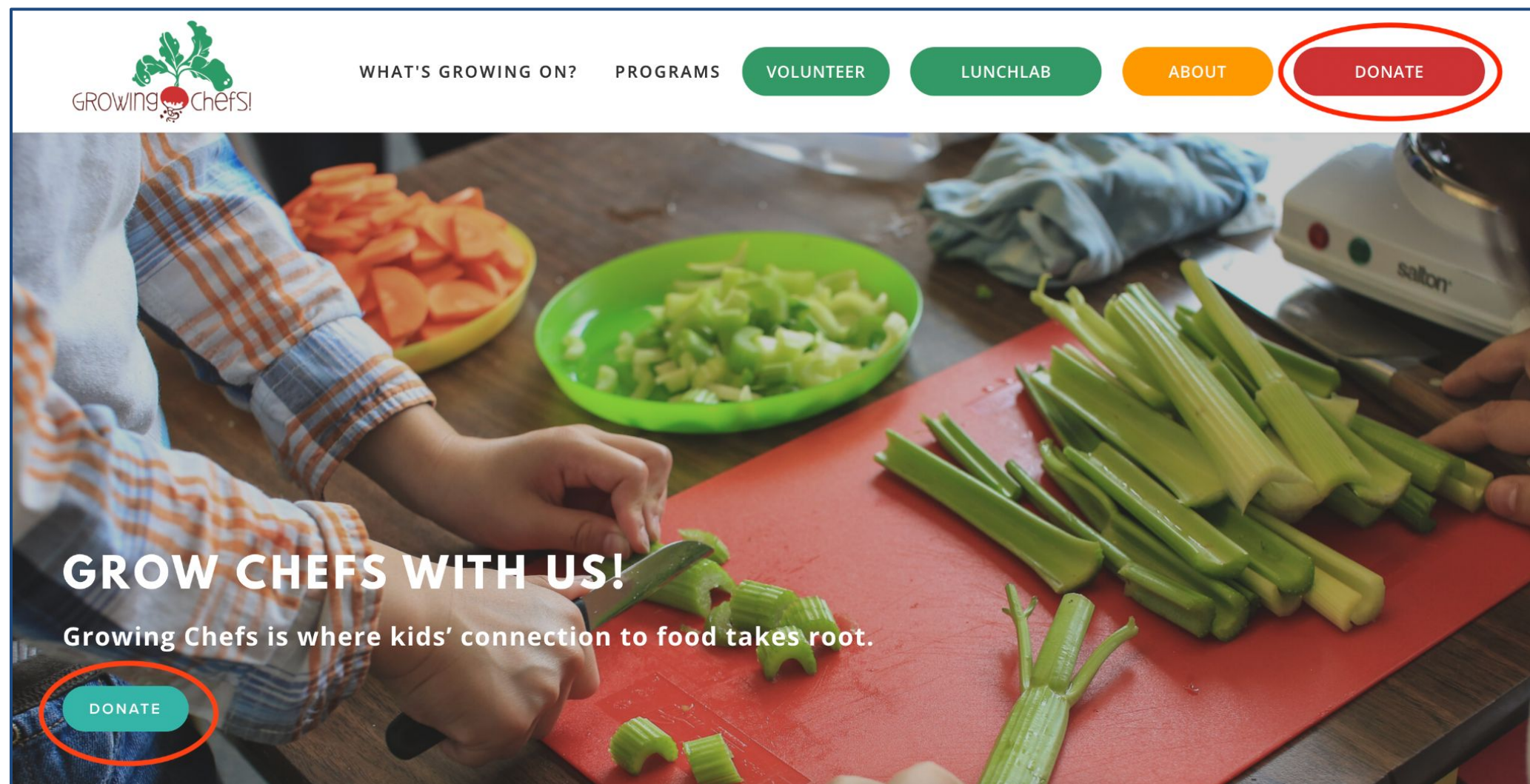
### 4. Ways to Give page

With CanadaHelps, You have unlimited access to donation forms. This allows you to create as many forms as needed and organize them as a “Ways to Give” page. Ways to Give pages usually include options to donate one-time, monthly, make a tribute gift, purchase a membership, donate gifts securities, etc.



# Best Practices for Using Donation Forms

## 1. Make it easy to find your donation form on every page of your website



- Make sure you have a “Donate” or “Donate Now” button in the top right corner of your navigation bar or as a permanent hovering button
- On pages with info about your programs or campaigns, always include a relevant donation link

# Best Practices for Using Donation Forms

## 2. Create as many Customizable Donation Forms as you need!

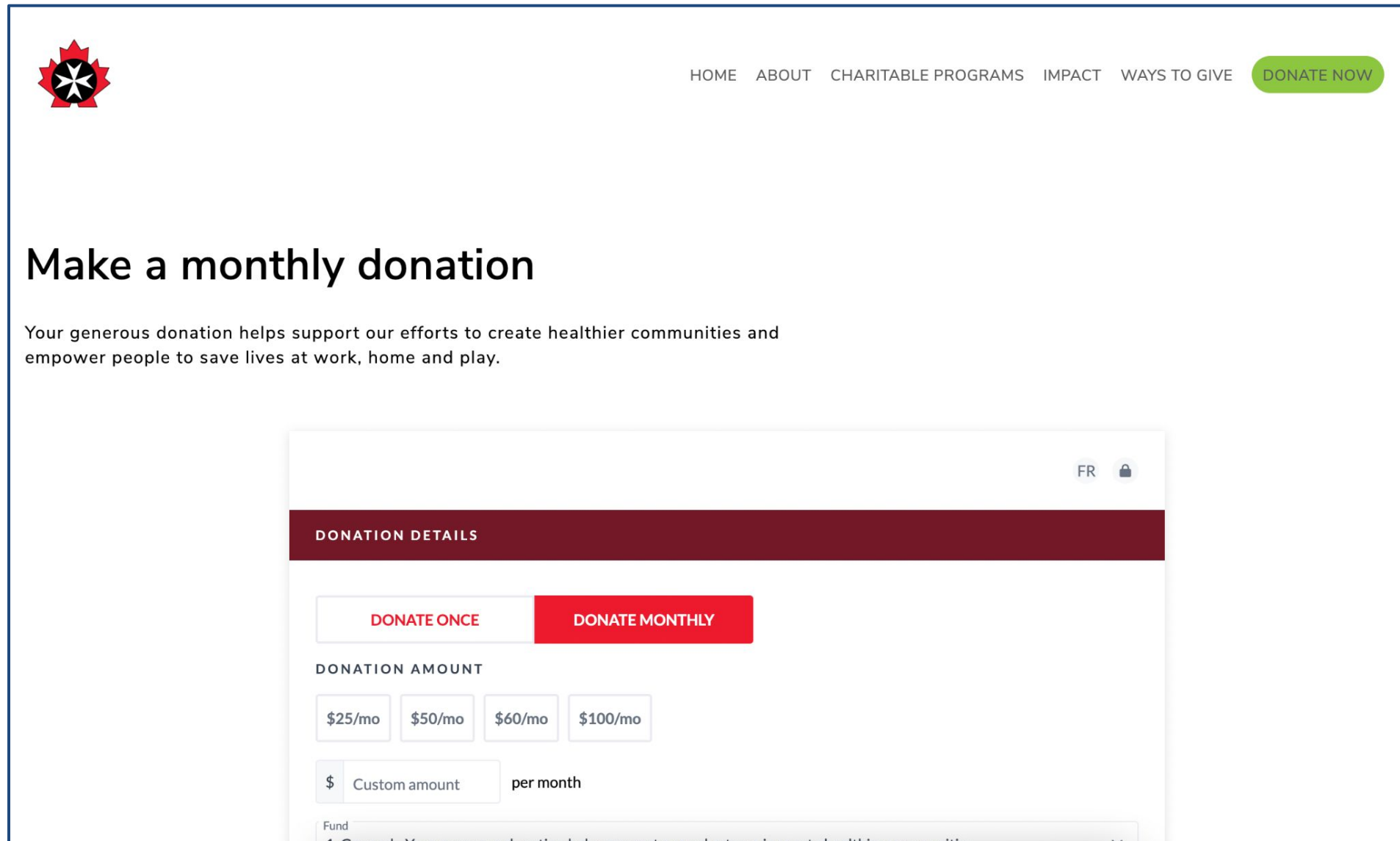
- The more active forms you have, the more you raise! Charities with at least 2 active donation forms **earn 2.5x more revenue annually than charities with 1 active form.**
- Consider including donation options for:
  - One-time donations
  - Monthly gifts
  - Tribute gifts
  - Donations of securities
  - Campaigns





# Best Practices for Using Donation Forms

## 3. Encourage Monthly Donations



The screenshot shows a donation form for CanadaHelps. At the top left is the CanadaHelps logo. The navigation bar includes links for HOME, ABOUT, CHARITABLE PROGRAMS, IMPACT, and WAYS TO GIVE, followed by a green 'DONATE NOW' button. The main heading is 'Make a monthly donation', with a subtext: 'Your generous donation helps support our efforts to create healthier communities and empower people to save lives at work, home and play.' The form itself has a dark red header 'DONATION DETAILS'. Below this are two buttons: 'DONATE ONCE' and 'DONATE MONTHLY', with the latter being highlighted in red. Under 'DONATION AMOUNT', there are four preset options: '\$25/mo', '\$50/mo', '\$60/mo', and '\$100/mo'. Below these is a custom amount field with a dollar sign icon, the text 'Custom amount', and a 'per month' label. At the bottom, there is a 'Fund' dropdown menu with the first option visible: '1. General: Your generous donation helps support our volunteers in create healthier communities'.

- Highlight the option to donate monthly. Monthly giving provides predictable revenue, which helps charities budget and plan for long-term impact.
- You can create a donation form with the default option to donate monthly, along with custom preset amounts.





# Key Takeaways & Action Plan

## 1. CanadaHelps Donor Insights section provides you with an overview fundraising efforts through CanadaHelps.

- Explore the section to compare your fundraising efforts YoY and MoM.
- If you see a decline in revenue or donors, you may explore further by downloading a detailed report in the [Data Download section](#) of your account.





# Key Takeaways & Action Plan

## 2. Engaging with donors and acknowledging their gifts is key to building loyalty and trust.

- Use CanadaHelps thank you tool to thank your donors in-app.
- Set up an automatic thank you message on your Donation Form
- Regularly check for any donations that haven't been acknowledged





# Key Takeaways & Action Plan

## 3. Your CanadaHelps charity account has all the necessary tools to seamlessly manage your monthly gifts.

- Review your existing monthly gifts and the new features. When a donor reaches out to make any changes to their monthly gift, you now know how to help them.
- If you are planning to acquire new monthly donors, take a look at our [Detailed Guide to Growing Your Monthly Donors](#)





# Key Takeaways & Action Plan

## 4. Customizable Donation Forms (CDFs) is the best way to optimize online giving on your website.

- Make sure to embed a donation form on your website according to best practices.
- Consider creating a Ways to Give page to provide more giving options to your donors.
- Check out our [Course on Customizable Donation Forms!](#)







# Useful Resources

- [CanadaHelps Course on Customizable Donation Forms](#)
- [Choosing the Right Type of Donation Form for Your Website](#)
- [Sharing a Donation Form on Your Website](#)
- [White Paper on Digital Donor Retention](#)
- [Detailed Guide to Growing Your Monthly Donors](#)
- [Accessing Your CanadaHelps Donation Reports](#)
- [Accessing Your Donor Insights](#)





# Contact Us

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