CanadaHelps × **phil**

Plan, Engage, Succeed: Communications for Small Charity Teams

SPEAKER: KIM FULLER

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 staff are on the unceded territory of the Coast Salish People, our Montreal staff 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

![CanadaHelps logo]

About CanadaHelps

- CanadaHelps is a charitable organization increasing giving in Canada through technology.

- **For Canadians,** CanadaHelps offers the most comprehensive and flexible range of giving solutions for donating or learning about any charity in Canada.

- **For Canada's 85,000 charities,** CanadaHelps provides affordable fundraising tools and education to help charities increase their impact.

- Since 2000, more than 5 million Canadians have donated over $4 billion to charities using CanadaHelps.

Showcase your charity, and accept donations

CanadaHelps Charity Profile allows you to find new donors, accept online donations and steward them into recurring supporters, all without any specific technical skills or even a website needed.

Boost your online fundraising today
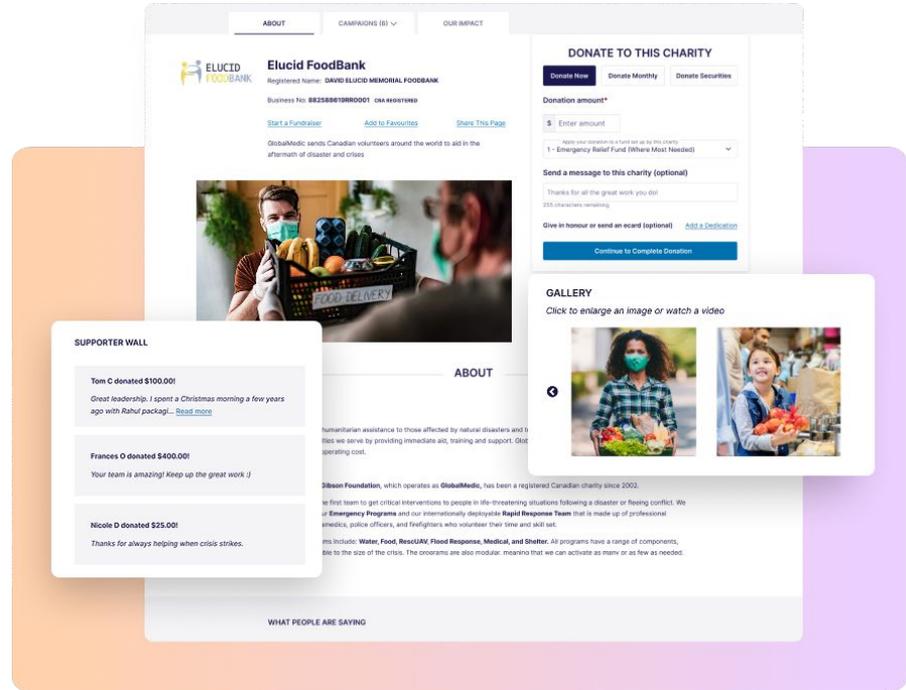
Housekeeping

- The recording and slide deck will be emailed to you following the webinar. You'll be able to watch the recorded video on demand.

- You can hear us, but we can't you.

- Have questions or technical difficulties?

- Type them into the Questions Log at anytime.

About The Presenter

Kim Fuller
Founder, <u>Phil</u>

Thanks to a combination of practical insight and boundless creativity, Kim has earned a reputation for delivering innovative strategies that effectively and efficiently meet the needs of today's evolving not-for-profit landscape. Her experience working with local, national and international charities combines over 25 years in marketing and fundraising, with a lifelong passion for volunteering in the community.

Award-winning social entrepreneur, host of the Philanthropy in Action podcast, international speaker and author of many articles on leadership and the social sector, she is always looking to learn more and share more.

When she is not in the office, she volunteers her time and expertise as a mentor and advisor to several local and national organizations.

Learning Objectives

By the end of this session, you will be able to:

- Plan communications so it is **realistic and manageable** for small teams.

- **Segment audiences** to reach the right people with the right message.

- Choose the right **tools, channels, and content formats** for today's fast-paced environment.

- Understand **AI benefits, risks, and ethical considerations** in communications.

- Leverage **resources efficiently**.

Always start
with strategy

A strong strategy will help:

GUIDE DECISIONS

Align messages, campaigns, and channels with your mission and goals.

FOCUS EFFORTS

Prioritize what matters most instead of trying to do everything.

INCREASE IMPACT

Reach the right audience with the right message at the right time.

SUPPORT ACCOUNTABILITY

Track results, measure success, and report with confidence.

REDUCE OVERWHELM

Help small teams manage competing demands more effectively.

Tying everything together

ORG GOALS   **DEV GOALS**   **COMMS GOALS**   **DIGITAL GOALS**

What a practical comms plan should include

A good strategy doesn't have to be long. It just needs to give your team a clear, practical roadmap to communicate effectively.

MISSION & GOALS	Clear purpose and measurable communications objectives.
AUDIENCES	Identify who you want to reach (donors, volunteers, etc.)
KEY MESSAGES	The main points you want each audience to understand or act on.
CHANNELS & TACTICS	Practical selection of platforms and tools you can manage.
CONTENT PLAN	Simple calendar or ideas for posts, emails, or campaigns.
METRICS & EVALUATION	Quick ways to measure success.
ROLES & RESPONSIBILITIES	Who does what, even if your team wears multiple hats.

Building a sustainable content calendar

A content calendar helps your team plan ahead, stay organized, and maintain consistent messaging.

Your calendar should:

- Schedule posts, emails, and campaigns in advance
- Align content with organizational priorities and campaigns
- Include key dates: events, holidays, fundraising drives
- Assign responsibilities: who creates, reviews, and posts
- Build in flexibility for timely or unexpected content

Working with limited resources
(people & money)

- Focus on platforms your audience uses most
- Repurpose content across channels
- Use free or low-cost tools
- Leverage volunteers, partners, and user-generated content
- Plan and batch campaigns to save time; and automate what you can
- Track only key metrics

Clearly positioning your organization

With so much competition these days, standing out is essential. You need to be clear on the core elements that define your organization, because they will guide your messaging, shape how people experience your work, and help you attract participants, partners, donors, volunteers, and staff. You need to clearly define your:

TAGLINE → emotional entry point

PURPOSE → why your organization exists

VISION → the future you're working toward

MISSION → what you do day-to-day

VALUES → how you behave while doing it

POSITIONING → what your organization does and how you are different

THEORY OF CHANGE → how that work leads to broader impact

Measuring & evaluating success

Establish your KPIs at the beginning and use the data. After setting goals, strategies, and tactics, decide what to measure to gauge success.

Examples include:

- Number of new donors / members / clients
- Average gift size or donation growth rate
- Website traffic or email click-through rates
- New followers gained or social engagement interactions

Remember that most platforms offer built-in, easy-to-digest analytics. Schedule regular check-ins to monitor performance and adjust strategies.

New metrics to consider

BEFORE

Open Rate
Campaign-level metric that's increasingly unreliable due to privacy features

Click Rate Per Campaign
Isolated measure that doesn't show relationship health

NOW

Active Audience Percentage
What portion of your list engages regularly over time

Engagement trend over time
Are subscribers becoming more or less engaged month after month

Complaint and deletion signals
The negative signals that directly impact reputation

Did you know? Organizations that measure results and adjust based on data are more than twice as likely to improve year-over-year performance.

Send the right message, to the right people

Audience segmentation

For small teams, tailoring your message for *every single audience* group is not sustainable. Instead, group supporters into 2–3 broad segments based on shared interests or behaviours:

- **Donors & Partners** → impact updates, financial opportunities
- **Staff & Volunteers** → stories of engagement, organizational updates
- **Media & General Public** → highlights, collaborations, key achievements

Then, create one core message per segment that can be slightly adapted for different channels. This way, you're still relevant and targeted, but it's manageable for a small team.

For each audience segment, ask:

Who are they?

- What are the demographics of each audience segment?
- How do they like to communicate?
- What communication channels do they use?

What do they need?

- What are their main aspirations?
- What's important to them?
- What are the main barriers they want to overcome?
- How do our programs help solve their problems?

Why are they important?

- How do they interact with our organization?
- How are they involved in the cause?
- What do they have access to that could help our cause or organization?

What do we want them to do?

- Once they know about our cause, our organization and our programs, what actions do we want them to take?

Key Messages

What main message(s) do they need to be exposed to so they are motivated to fulfill the desired action(s)?

Did you know?
Audience-segmented messaging increases campaign response rates by **up to 50%** compared to "one-size-fits-all" messages.

Tell stories that matter

Stories create an emotional connection that drives action (donating, volunteering, or advocating) yet many organizations overlook the impact stories they already have.

- Founder stories
- Transformation stories
- Volunteer stories
- Donor stories
- Advocacy stories
- Program/Event stories
- Partnerships stories

- Success stories / Impact stories
- Staff stories
- Historical stories
- Behind-the-scenes stories
- Peer-to-Peer Fundraising stories
- Testimonials and Reviews

The pity party is over

People don't want to feel hopeless. Hopelessness breeds apathy, not motivation. Stories of hope and impact connect audiences to your mission.

Inspire action by showing that your work makes a real difference and that good humans are making it happen.

Also, the **way** you communicate your message greatly impacts how that message is received and what emotions are associated with your brand.

Dignity first storytelling

Empower through consent & agency

- Obtain informed consent; explain story use.

- Use pseudonyms; anonymize sensitive details.

- Ensure respectful use of photos and visuals.

Focus on strength & solutions

- Highlight resilience, agency, and achievements; avoid portraying individuals as helpless victims.

- Avoid stereotypes; focus on program impact.

Co-create authentic narratives

- Collaborate with participants to reflect their lived experiences.

- Allow individuals to review and approve stories before sharing.

Did you know?
Volunteers and supporters often share content that feels authentic and personal 3× more than polished promotional content.

Work smarter, not harder

Maximize the value of your stories with repurposing

Repurposing content allows you to share the **same story across multiple channels.**

The essence of your story stays the same, but the packaging changes.

This strategy is **essential** for organizations with small (to non-existent) communications teams!

Adapting stories to different channels

Blog Posts

- A blog post can often be homebase for your story, where the longer more detailed version lives.

- This version of the story can also incorporate data, interviews, and great visuals.

- The blog is where you can delve deeper into the background and broader context of the story and give the full experience to your readers.

Reports & Case Studies

- Annual reports, impact reports and case studies are for your more academic, very engaged, or very invested audiences.

- Take your story and flesh it out into the bigger picture, highlighting long-term impact with plenty of supporting data and testimonials.

- This storytelling is more formal, though that doesn't mean it has to be dry and boring.

Adapting stories to different channels

Social Media

- Social media is where you can sprinkle shorter versions of your story across weeks and months and even years.

- One blog can be turned into a reel, a carousel, a quote, an image and caption, and more.

- What are all the ways you can visually portray the story in bite-size pieces and reel your audience into read the full story?

Email Newsletters

- Like social media, email newsletters showcase the highlights of the story in text form (plus at least one visual).

- Summarize the key takeaways of your story and drive your subscribers to your website to read more or engage through other actions like donating!

- People get a lot email, so keep it short and sweet with a great subject line!

A.I

**Use AI to save time,
not to replace people**
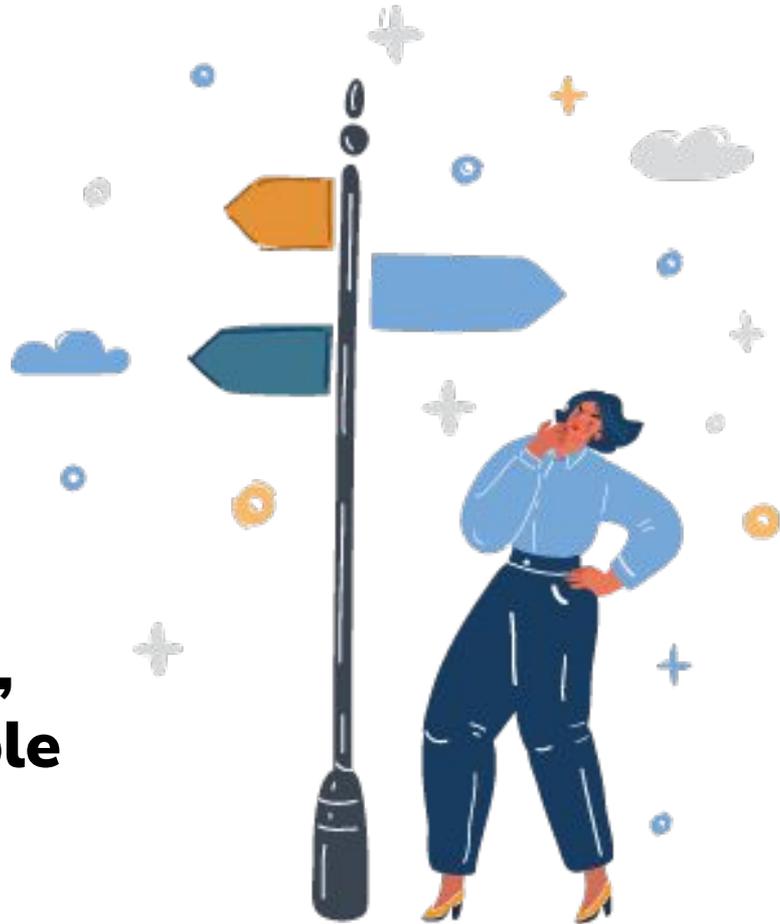
Using AI responsibly

AI can be a powerful ally, but nonprofits must use it responsibly. Protect data, ensure accuracy, follow privacy rules, and **be mindful** of bias to keep your work ethical and trustworthy.

- Develop an AI user policy so your entire team is clear on how and when to use AI.

- Do not upload unprotected donor or sensitive information.

- Always fact-check AI-generated content before publishing.

- Respect unsubscribe requests and privacy opt-outs.

- Follow internal policies for AI approvals and anonymization.

- Be mindful of unintended bias in AI outputs.

- Invest in paid tools.

Use prompts for better content creation

The quality of your AI output depends on the quality of your prompts.

- **Be specific:** Include context, audience, tone, and purpose in your prompt. Example: "Write a 150-word social media post about our upcoming volunteer day, in an encouraging and friendly tone, targeting local young adults."

- **Break it into steps:** Ask AI to draft, then refine, then suggest alternatives.

- **Use examples:** Provide sample sentences or previous posts to guide style.

- **Iterate & tweak:** Review AI output and adjust prompts for clarity and alignment.

- **Keep a prompt library:** Save effective prompts for repeated use to save time.

AI tools to explore

GovAI NotebookLM perplexity

Claude HeyOrca! Canva FATHOM

Gemini Copilot CANADIAN CENTRE FOR NONPROFIT DIGITAL RESILIENCE Nonprofit AI Impact Hub

Did you know? Organizations can save up to 12 hours a week by automating emails to donors.

Use social media to engage & fundraise

What do you want to achieve with social media?

Before content creation, you need objectives. Align your social media goals with your main communications goals.

Do you (mainly) want to:

➔ Increase donations?
➔ Attract volunteers?
➔ Raise awareness?
➔ Promote events?

Every post should serve a larger goal, for example:

★ Increase volunteer sign-ups by 20% over the next six months.
★ Raise $10,000 during our year-end giving campaign.

Choose the right platforms

Focus efforts on platforms that align with your goals and audience activity, not new trends. Don't add platforms you can't keep active.

Facebook

- Community Building
- Event promotion
- Fundraising

Instagram

- Visual storytelling
- Behind the scenes content
- Advocacy

LinkedIn

- Professional networking
- Partnerships
- Thought leadership
- Recruitment

Know your resource limits

Some platforms require more effort, or more frequent updates than others. What can your team realistically accomplish?

YouTube

- Library of all your videos
- Playlists of campaigns
- Webinars and education

TikTok

- Short-form video content
- Fun challenges
- Authentic connection with younger audiences

WhatsApp

- Used more for direct community engagement, supporter groups, or internal volunteer coordination
- Not typical for external messaging

Create a consistent (and less stressful) process

A **Social Media Content Calendar** is a visual planning tool to schedule posts across platforms and ensure a steady flow of content, and alignment between teams and with campaigns.

1. Select your **format** (Excel, Google Sheets, Tools (Microsoft Planner, Trello, Asana, etc.)) & **location** (shared drive, team, or space)

2. Create your **columns**, for example:
   - Date & Time
   - Social Platform
   - Content type (video, image, link)
   - Copy/text (and translations)
   - Associated campaign or content pillar
   - CTA (Call to Action)
   - Status (draft, review, approved, scheduled, published, etc.)
   - Owner (person responsible)

Building & engaging community takes time
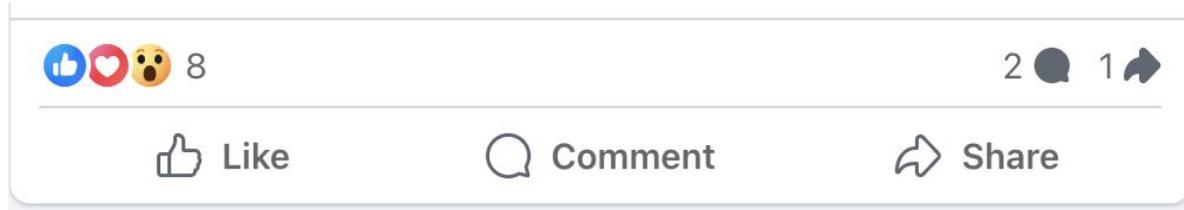
Responding to comments, questions, and direct messages builds trust and makes followers feel valued.

Engagement and conversations are two-way! Use polls, questions, or discussion posts to start conversations.

Did you know?
Posts that include
visual storytelling earn
more than 2×
the engagement
of text-only posts
on social platforms.

UGC: Foster belonging

Your supporters have their own stories, photos and videos about engaging with your organization. **Ask them to share!**

➜ Feature your audience's content in posts and blogs.
➜ Have a volunteer or donor take over your social media account for a day.
➜ Spotlight volunteers, donors, or partners to show appreciation.

How to use it to fundraise

Techniques for effective fundraising

Create urgency

Use storytelling

Have a clear Call to Action

Provide Social Proof

How to reach even more people

Expanding your reach on a small budget

Ambassadors

Collaborate with a local business or well-known ambassadors about your cause to amplify your message to new audiences. Give engaged donors the tools to become stronger ambassadors for your organization.

Joint Campaigns

Use collaborative/co-authored posts and communications with other organizations, groups or businesses.

Using media relations to amplify your message

Media can help your stories reach a wider audience and build credibility.

- **Build relationships** with local journalists, bloggers, and niche outlets relevant to your mission.

- **Pitch stories** that highlight impact, human interest, or timely initiatives.

- **Provide clear key messages** and visuals to make their job easier.

- **Leverage press coverage** on your website, social media, and newsletters.

- **Track mentions** to understand reach and effectiveness.

What will you do with all the time you'll save with your new comms plan?!

phil

Thank you!

kim@phil.ca
phil.ca

@phil4good

CanadaHelps

Book a Time with CanadaHelps' Team to discuss your fundraising

@CanadaHelps

charitylife@canadahelps.org