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Sound  
Fundraising  
Strategies

# From Firefighting to Focus: A Strategic Fundraising Roadmap for Small Nonprofits

SPEAKER: LAURIE DE FLEURIOT



# 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, Kooten Creations

# About CanadaHelps

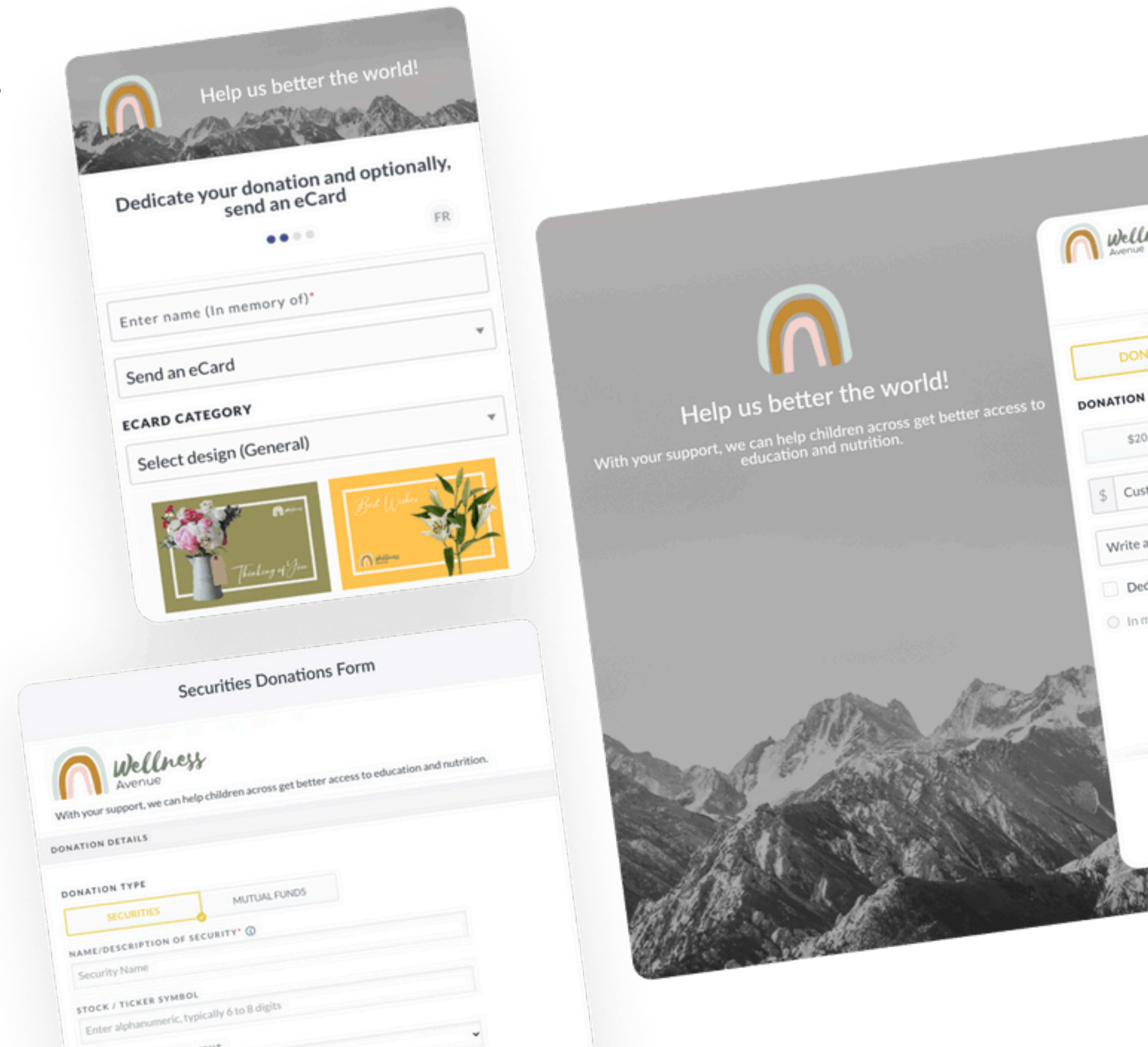
- CanadaHelps is a charitable organization increasing giving in Canada through technology.
- **For Canadians,** CanadaHelps offers the most comprehensive and flexible range of giving solutions for donating or learning about any charity in Canada.
- **For Canada's 85,000 charities,** CanadaHelps provides 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.



# Fundraising technology that supports you and your mission

- CanadaHelps fundraising tools are purpose-built for Canadian charities
- Seamless branding and e-commerce optimization
- Automated CRA- compliant tax receipts and thank-yous
- Customizable donation forms, peer-to-peer, event tools and CanadaHelps Ensemble

[Maximize 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

**Laurie de Fleuriot de la Colinière, CFRE**

**Founder and CEO of [Sound Fundraising Strategies](#)**

Laurie is the Founder and CEO of Sound Fundraising Strategies, where she helps overwhelmed Executive Directors move from "panic" to "planning". With over 15 years of fundraising experience and a track record of driving year-over-year growth (20-50% and more), Laurie understands that small nonprofits don't need more 50-page strategies sitting on a shelf - they need sustainable systems that actually get the work done. As a fractional fundraiser, she specializes in providing senior-level fundraising expertise and hands-on implementation at a fraction of the cost of a full-time hire, liberating leaders from the "firefighting" cycle so they can focus on their mission.





# Quick Poll



Tell us: Does your organization have a dedicated fundraiser on staff or is fundraising one of your many "hats"?

# Are You a Firefighter or an Architect?

## Today's Goal:

Move from **Panic** to **Planning** — with a framework that's actually doable.

## The Firefighting Cycle

Always reacting. Never building. Leads straight to burnout (for you and your team).

## The Strategic Shift

A plan doesn't cost you time; it saves you time. Faster decisions, fewer fires, better sleep.

# The S.O.U.N.D. Method

Five practical steps designed for busy leaders who need clarity, not complexity.

- S — Stop & Audit (The Pause)
- O — Organize Your Vision (The Goal)
- U — Uncover Your Assets (The Tools)
- N — Narrow Your Focus (The Strategy)
- D — Deploy the Calendar (The Action)

# S = Stop & Audit

You cannot map a route without knowing your starting point. Resist the urge to skip this step! It's the foundation everything else builds on.

## **Donor Retention Rate**

What % of last year's donors gave again? Industry average: 40–45%. This reveals whether you're building relationships or just churning through names.

## **Total Raised vs. Goal**

Where are you right now? How much did you raise last year? The year before? Your donor management system can pull this report in minutes.

# Accessing Donation Reports

The screenshot displays the CanadaHelps dashboard interface. On the left is a navigation sidebar with the following sections:

- CanadaHelps logo
- Fund options
- DONATIONS
  - All donations
  - Monthly gifts
- REPORTS & INSIGHTS
  - Download reports** (highlighted with a red box)
  - Donor insights
  - Giving season reports
- ADDITIONAL TOOLS
  - Ensemble

The main content area features three summary cards:

- Total Funds Raised**: \$335,873.13 (since Jan 2026, -15.4% YOY)
- Total Donations**: 37,027 (-8.1% YOY)
- Total Donors**: 27,745 (-9.7% YOY), with 1,146 Recurring Monthly Donors.

Below these cards is a goal tracking section:

- Example** goal for August 31, 2025 - September 30, 2025.
- 182 past due.
- An **Edit Goal** button.
- A yellow warning banner: "Your goals are past their deadline. Do you want to edit your goal?"

Top right navigation includes "Français" and "CanadaHelps" with a dropdown arrow.

[Guide to Accessing Your Donation Report](#)

# O = Organize Your Vision

Knowing where you're going requires two things working in tandem: a concrete number and a compelling story.

## The Revenue Objective

Your financial destination. A specific, calculated number you're working toward. Not a **wish**, but a target rooted in real data.

## The Narrative Vision

Your compelling "why." The story that moves people to act — the emotional fuel that makes your numbers matter to donors.

**"We need to raise more money" is a wish, not a goal**

Calculate your Financial Gap:

- Total Budget
- Minus Committed Revenue (grants, contracts, pledges)
- Equals Your Fundraising Gap



# Turning Metrics Into Strategy

Use your audit data to project realistic revenue

## Example

200 donors × 45% retention = 90 retained donors

90 donors × \$500 average gift = \$45,000 projected

\$150,000 gap – \$45,000 = \$105,000 still to raise

# Reality Check

Does your capacity align with your goals?

**Most small nonprofits are experiencing zero or declining revenue growth**

Have the same team/capacity as last year? It's unrealistic to think you'll achieve 20%+ growth without increasing your capacity.

***Your most important question before we move on: Is your Financial Gap a realistic fundraising goal?***

**[Who you serve] + [What you do] +  
[Why it matters]**

Your One-Sentence Case

*Your case for support is the emotional fuel for your metrics*

# Bringing It Together

"We need to raise  
\$105,000 from  
individual donors..."

"So that no senior in  
our community goes  
hungry."

# U = Uncover Your Assets

**Small nonprofits have more than they realize.** When we feel under-resourced, we focus on what's missing — strategic fundraising starts with what you have.

# U = Uncover Your Assets

## People

Board members, volunteers, loyal donors, program alumni. One passionate board member who makes five personal calls can outperform a week of email blasts.




## Stories

Not statistics — transformation. The family who found housing. The student who graduated. These stories bring your one-sentence case to life.

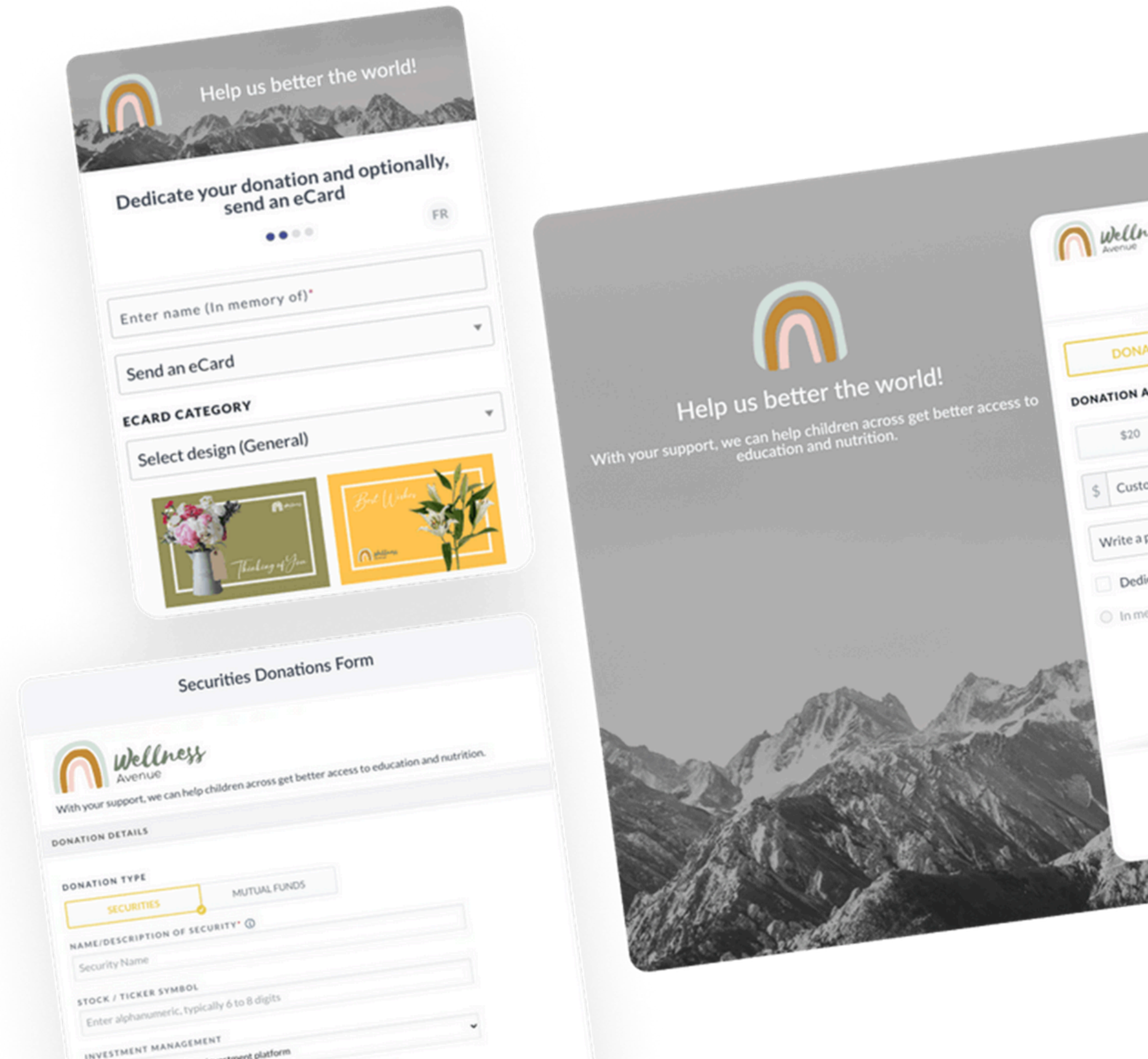
## Tech

What tools are you already paying for but not fully using? Automated receipting, recurring giving, and scheduled comms can dramatically cut your admin burden.

# Tech that reduces your workload

-  Automatic thank-yous with your custom message and branding.
-  CanadaHelps automatically issues electronic tax receipts and you can resend receipts as needed.
-  CanadaHelps provides support for both charities and donors

[Learn more about fundraising with CanadaHelps](#)



# CanadaHelps Ensemble

Ensemble is the modern operating system for charity teams—bringing core fundraising, donor management, and communications into one secure, Canadian-built platform.



Centralize donor records in one clean database



Export clean data for audits, T3010 filing, and reporting



Automate CRA-compliant tax receipting



Seamless integration with CanadaHelps donation pages

[Learn more about CanadaHelps Ensemble](#)

**Donations**

Status ▾ Date received ▾ Campaign ▾ Search by name, email or receipt No. + Add Donation

Total raised **\$99,000** Total donations **356** Total donors **648** Average donation **\$20**

Donor	Date Received	Amount	Fund	Campaign	Status	Receipt
Danielle Brown	01/19/2024	\$25.00	General	Giving Tuesday	Completed	93046
Floyd Miles	01/14/2024	\$120.00	General	Giving Tuesday	Completed	45904
Eleanor Pena	01/17/2024	\$25.00	General	It's cool to be kind	Completed	50364
Cameron William...	11/02/2023	\$55.00	General	Run for the cure	Completed	3398
Annette Black	12/19/2022	\$25.00	Clear Water	Run for		
Brooklyn Simmons	11/16/2022	\$145.00	Clear Water	Run for		
Cody Fisher	03/13/2022	\$80.00	Food Security	It's cool		
Kathryn Murphy	09/11/2021	\$2,175.00	Food Security	It's cool		
Esther Howard	01/28/2021	\$25.00	General	It's cool		
Jane Cooper	01/19/2021	\$35.00	Food Security	Giving		
Jonny Wilson	05/05/2021	\$300.00	Food Security	It's cool		

Show 10 ▾ 1 of 8 >

**Quick Add: New Contact**

Contact name  
Prefix ▾ First name \* Last name \*  
Mr. ▾ Samantha Rivers

Middle name

Email address  
Type Email  
Personal ▾ sam.rivers@gmail.com

Phone number  
Type Phone number Exit  
Mobile ▾ +1 416 567 3491

Done



# Quick Poll



Tell us: If you could DROP one communication channel or platform tomorrow with no guilt, what would it be?

# N = Narrow Your Focus

**The enemy of small shop success is trying to do everything.** Doing everything means doing nothing well.

## **Introducing the “Rule of Ones”**

ONE Goal

ONE Channel

ONE Message

# D = Deploy the Calendar

A plan that isn't on the calendar is just a daydream. Here's how to build a sustainable 12-month fundraising calendar in three steps.

## Step 1

Map your "Big Moments." These are your anchor campaigns like year-end giving, a spring appeal, your annual event, Giving Tuesday.



## Step 2

Fill the gaps with gratitude. Between campaigns, your job is stewardship.



## Step 3

Use your tech to "set it and forget it." Most platforms allow you to schedule emails and social posts in advance.

# The S.O.U.N.D. Method

Let's recap

- S** Stop & Audit: Know your retention rate and current position
- O** Organize Your Vision: Revenue objective + Narrative vision
- U** Uncover Your Assets: Inventory people, stories, tech
- N** Narrow Your Focus: Rule of Ones (scaled to your capacity)
- D** Deploy the Calendar: Big Moments first, then gratitude



# Your Homework

## The 2-Hour Strategy Morning

- Block 2 hours on your calendar THIS WEEK
- No emails. No interruptions. Protect this time.
- Work through the S.O.U.N.D. steps:
  - Find your retention rate and calculate your fundraising gap
  - Connect those metrics to realistic revenue projections
  - Write your one-sentence case for support
  - Inventory your assets
  - Choose your ONE goal, ONE channel, ONE message (or scale up if you have the team)
  - Plot your Big Moments on a 12-month calendar

# Resources & Next Steps

## Connect with SFS

Connect with Sound Fundraising Strategies for personalized support

[SoundFundraisingStrategies.com](https://www.SoundFundraisingStrategies.com)

## Subscribe to Harmony in Impact

Weekly insights on sustainable leadership and fundraising without burnout



## Any Questions?

Let's open up the chat for your questions!



Book a Time with CanadaHelps' Team to  
discuss your fundraising



[charitylife@canadahelps.org](mailto:charitylife@canadahelps.org)