



CanadaHelps Donation Form Modernization Launch

SPEAKERS: SADIE STEPHENS &
TREVOR STAIRS



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, we know it is important to acknowledge that our Vancouver staff are located on the unceded territory of the Coast Salish People, the 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



Meet the Presenters

Trevor is a **Product Owner** at CanadaHelps. He manages product development projects with engineers, marketing and design. He has worked at CanadaHelps since 2020, in a variety of roles, giving him a strong grasp of charity needs and pain points.



Sadie is the **B2B Digital Marketing Specialist** at CanadaHelps. She has worked on charity marketing projects at CanadaHelps for two years, including product and content campaigns.

Today's Agenda

- **Update Overview**
 - Backstory
 - New feature showcase
 - Multi-step, tribute & securities
- **Activation & usage**
 - Live demo
 - Tips to boost conversion
- **Wrap-Up**
 - Q&A / discussion
 - Final takeaways



Donate to our Emergency Fundraiser

We're raising \$150,000 to keep our HelpLine open and ensure 2SLGBTQ+ youth can continue to access peer support, resources, and community. Every donation helps us show up for youth when they need it most. Help us stay open.

Funds raised

\$36,291.04 raised

Goal: \$150,000.00

Your donation

Donate once

♥

Donate monthly

\$25

\$50

\$100

\$250

Other

Fund*

Choose a fund to direct your donation

▼

Write a private message to us (optional)

♥

Want to dedicate your gift to someone special?

☐

Yes, I want to dedicate my donation

Your details

Tell us a bit about yourself so we can send your tax receipt.

Personal

Corporate

Email Address*

✉

Enter your email address

First Name*

Last Name*

👤

Enter your first name

👤

Enter your last name

Backstory

- Why is CanadaHelps releasing updates?
- Last year, CanadaHelps released product updates our most-popular Full Donation Form
- We listened to feedback from charity clients, and made the following improvements to full forms:

	Modernized interface
	Refreshed look and feel
	Redesigned eCard selection for tribute gifts
	Simplified fund selection

Full Form Post-Design Update Results



+12%

Boost in the average
donation per visitor



+11%

Increase in donor
conversion speed



+20%

Improvement in the donor
satisfaction rate



**It's time to transfer this
same success to our other
forms...**

- Multi-step
- Tribute
- Securities

Old Multi-step Design V. New Form

GivingTuesday 2026

Right now, families across our community are turning to us for support. Every donation helps stock our shelves and ensures no one has to face hunger alone.

GIVING TUESDAY

BN: 896568417RR0001

FR

This GivingTuesday, your gift goes directly to providing food for those who need it most.

FUNDS RAISED

\$37,594.00 of \$50,000.00 total

DONATE ONCE

♥ DONATE MONTHLY

DONATION AMOUNT

\$10/mo

\$20/mo

\$50/mo

\$100/mo

\$ Custom amount

per month

Fund

Area of greatest need

Write a private message to us (optional)

Donate

Previous Multi-Step Form

GIVING TUESDAY

GivingTuesday 2026

Right now, families across our community are turning to us for support. Every donation helps stock our shelves and ensures no one has to face hunger alone. This GivingTuesday, your gift goes directly to providing food for those who need it most.

Coming Soon!

Your donation

FR

Funds raised

\$37,582.00 raised

Goal: \$50,000.00

Donate once

♥ Donate monthly

\$10/mo

\$20/mo

\$50/mo

\$100/mo

Other

Your generosity provides a family of four with healthy, nutritious meals for an entire month.

Fund

Continue

This donation supports BN 896568417RR0001.

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New Multi-Step Form

Multi-Step: Donor-First UX

✓	Clear step-by-step progress bar to reduce drop-off and maximize conversions
✓	Reduction in clicks and scrolling
✓	Humanized, conversational copy tone
✓	Donation summary with gift breakdown and schedule

DONATE

Make a difference today



Your donation is life changing, and tax-receiptable! We've made it easy for you to donate with a few different convenient ways of accepting payments through major credit cards, PayPal and more. Your generosity helps make tails wag and hearts smile. So, why wait? Join us in creating a brighter future for the Underdog.

When you donate through CanadaHelps using the form below, your contribution is tax-receipted instantly, no matter the amount. You can opt for a one-time donation or become a valued monthly donor, giving you flexibility in your support.



Your donation

FR

Donate once

Donate monthly

Donation amount

\$ Custom amount

Fund

Aspen's Veterinary Care

[Write a private message to us \(optional\)](#)

Want to dedicate your gift to someone special?

☐ Yes, I want to dedicate my donation

Continue

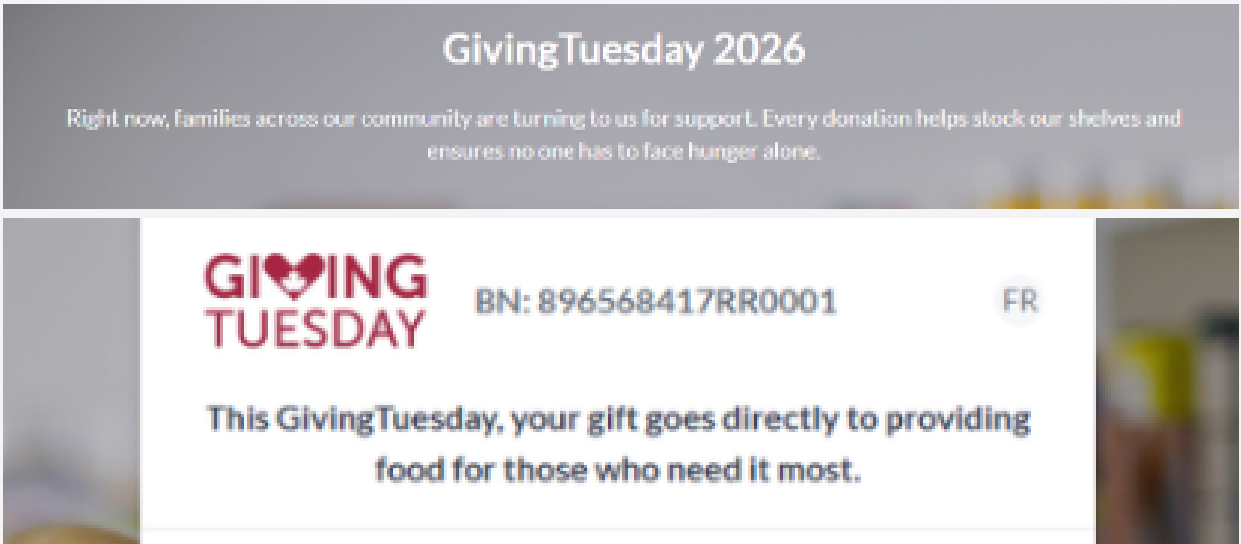
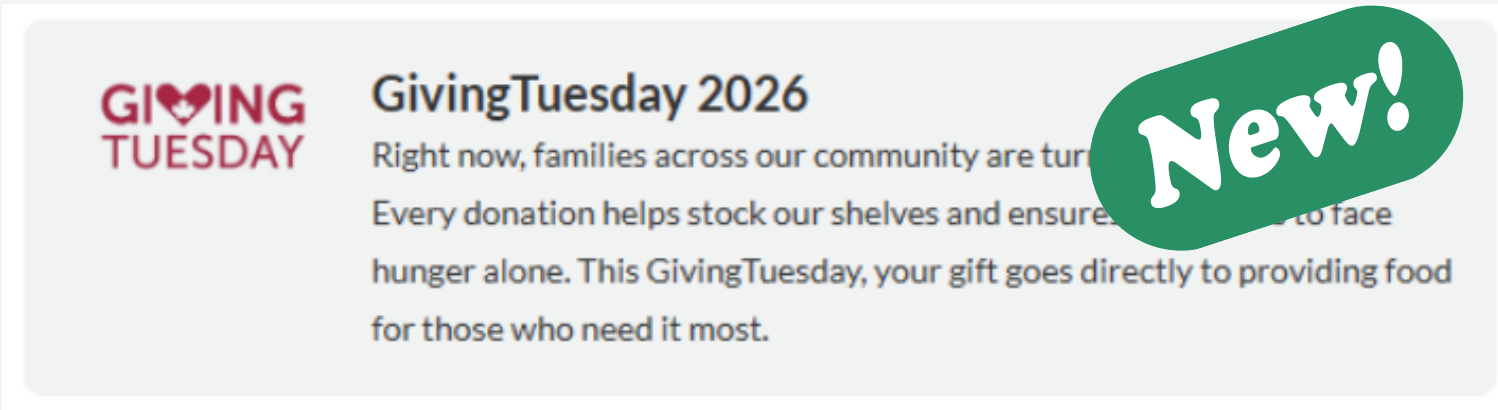
This donation supports BN 820288311R0001.

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Multi-Step: Design Improvements



	New	Old
✓	Logo, header, and impact message appear at the top-left on a clean grey background	Description messaging inconsistently placed in the background, other times on the header
✓	Copy is easy-to-read, and stands out without any distracting background noise	Copy defaulted to white or black – creating difficult in determining what background image to use to make the copy stand out

Simpler Form Customizations

New

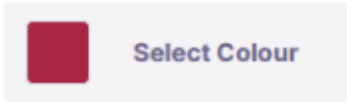
- Streamlined customization
- Single selection process for uniformity
- Background image is now the impact image – giving more control over what donors see

Old

- Heavy customization required
- Four colour selections, an overlay, and text colours
- Donation Form covered the background image

Colour and Style

Primary Colour

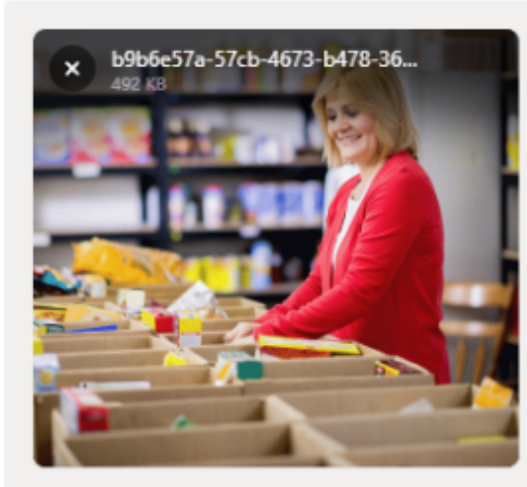


Monthly Donation Icon



Impact Image

Images must be no larger than 5,000 × 5,000 pixels and 2MB. [Learn more about using images, including how to adjust larger images.](#)



Powered by PQINA

Apply Translucent Overlay Over The Background Image And/Or Colour (Improves Text Readability)

Note: If you remove the overlay, please ensure your copy reads clearly.



Headline And Descriptive Text Colour



Monthly Donation Icon



Background Image

Upload an image to appear behind your form. Images are automatically cropped and resized to cover the entire screen. Images must be no larger than 5,000 × 5,000 pixels and 2MB. [Learn more about using images, including how to adjust larger images.](#)



Powered by PQINA

Colour and Style

Buttons And Links



Title Background



Background Colour



Title Bar Text



Apply Translucent Overlay Over The Background Image And/Or Colour (Improves Text Readability)

Note: If you remove the overlay, please ensure your copy reads clearly.



Headline And Descriptive Text Colour



Monthly Donation Icon



Embedded

Linked

Let's Build a Donation Form Together

- Embedded v. linked forms
- Multi-step donation form
 - Enable cover the fees
 - Enable Monthly prompt
- Securities form

[Français](#)

 **CanadaHelps**

CanadaHelps engages Canadians in the charitable sector, providing accessible and affordable online technology to both donors and charities to promote - and ultimately increase - charitable giving in Canada's tests



Want to dedicate your gift to someone special?

☒ Yes, I want to dedicate my donation

In Memory Of

In Honour Of

In Honour Of



 Enter the honouree name

☒ Send an eCard ☐ Do not send an eCard, I will notify family on my own.

Categories

Birthdays

Hanukkah

Father's Day

Select design (General)

Weddings

Thanksgiving

Valentine's Day

Sympathy

Teacher Gifts

Thank You

GivingTuesday

Thinking of You

Halloween

Holiday

Automated test Category

A Special Gift



A Gift For You



A Special Gift For You









Recipient Details

Recipient name*



 Enter recipient name

Recipient e-mail*



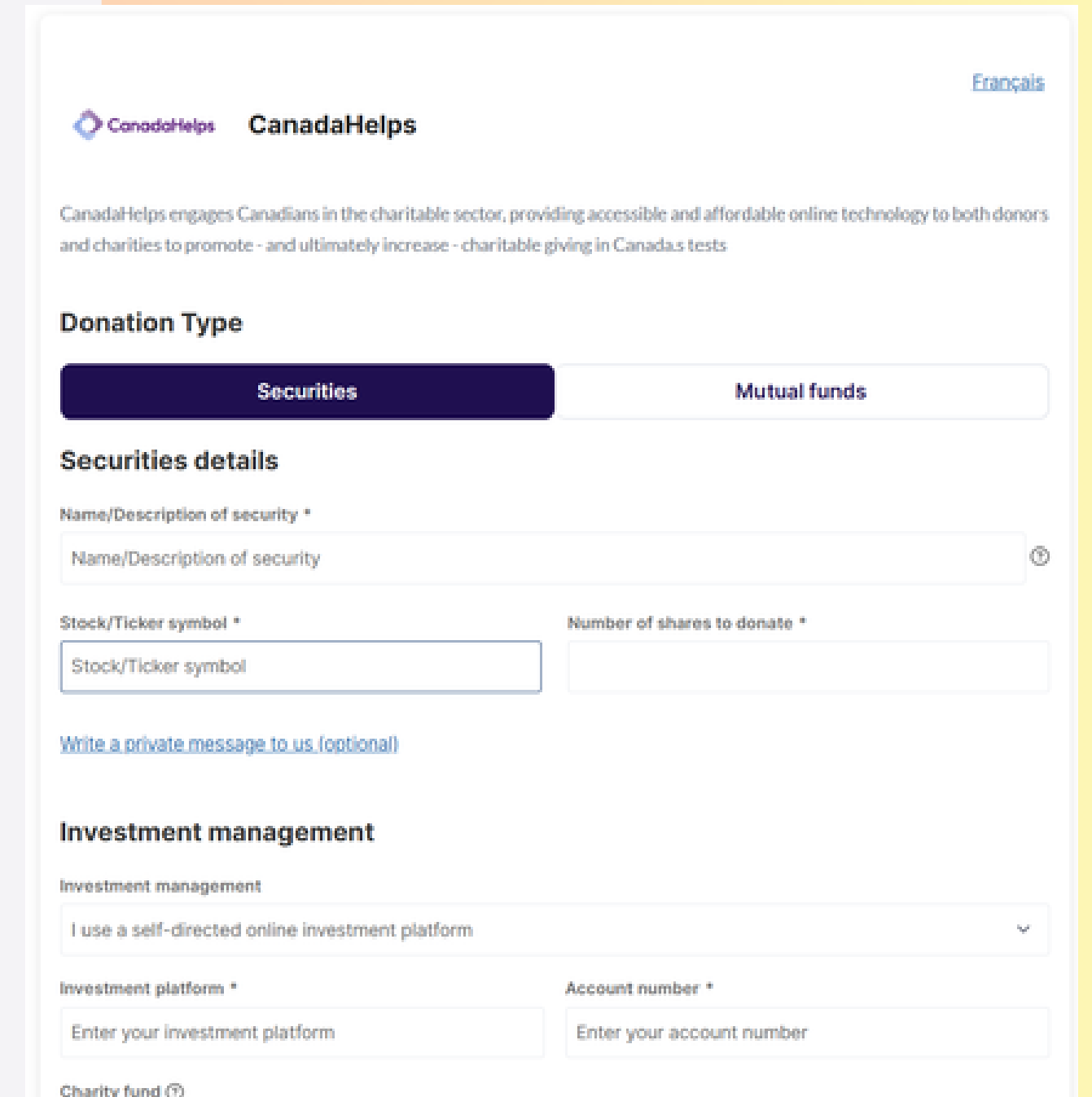
 Enter recipient email

Tribute-First Updates

- Redesigned eCard selection process
- Customizable card designs in the toggle menu
- Optimal for maximizing holiday campaigns
- Helps build the emotional connection with donors

Securities Updates

- **Easy and simple**
 - CanadaHelps facilitates the sale of the securities, issues the tax receipt, keeps the donor informed at each process step, and transfers the proceeds to the charity's bank account
- **Fast-growing area of opportunity for charities**
- **The number of securities donors has increased 200% since 2020**
- **Last year, the median securities donation was \$9,500**
- **Newly updated flat-rate limits for securities fees, especially useful for major donations**



The screenshot shows the CanadaHelps website interface for making a securities donation. At the top right is a link for 'Français'. The header includes the CanadaHelps logo and name. A descriptive paragraph states: 'CanadaHelps engages Canadians in the charitable sector, providing accessible and affordable online technology to both donors and charities to promote - and ultimately increase - charitable giving in Canada's tests'. Below this is the 'Donation Type' section with two buttons: 'Securities' (highlighted in dark blue) and 'Mutual funds'. The 'Securities details' section contains a text input for 'Name/Description of security *', a 'Stock/Ticker symbol *' input, and a 'Number of shares to donate *' input. There is a link 'Write a private message to us (optional)'. The 'Investment management' section features a dropdown menu currently set to 'I use a self-directed online investment platform'. Below this are inputs for 'Investment platform *' and 'Account number *'. At the bottom is a 'Charity fund' dropdown menu.

[Français](#)

 **CanadaHelps**

CanadaHelps engages Canadians in the charitable sector, providing accessible and affordable online technology to both donors and charities to promote - and ultimately increase - charitable giving in Canada's tests

Donation Type

Securities Mutual funds

Securities details

Name/Description of security *

Name/Description of security ⓘ

Stock/Ticker symbol * Number of shares to donate *

Stock/Ticker symbol

[Write a private message to us \(optional\)](#)

Investment management

Investment management

I use a self-directed online investment platform

Investment platform * Account number *

Enter your investment platform Enter your account number

Charity fund ⓘ

Securities: Fast, Direct, and Transparent

1

Donors complete the CanadaHelps securities donation form

Once a donor submits their investment details through the form, we automatically issue them a Letter of Direction to send to their broker.

2

Handled between the donor's broker and CanadaHelps

Shares typically settle in CanadaHelps' account within 1-2 business days. Donors get a receipt based on the value of that day, protecting them from market fluctuations before the sale completes.

3

Proceeds go directly to your charity's bank account

CanadaHelps transfers the proceeds once the shares are sold. Your charity will never need its own brokerage account to manage the sale.

What if the donor uses a direct investing platform?

If the donor manages their own investments through platforms like RBC Direct Invest, TD Waterhouse, Scotia iTrade, or QuestTrade, the Letter of Direction provided includes all the information they need to complete the securities gift.

What do you need to get started with the new forms?



No tech updates are required. Donation forms will automatically activate the new design changes.



The changes are aesthetic. Form functionality and donation processing will not be impacted.



Quality-check your form. Ensure your impact image and description copy appear as you intended. The image should be high-resolution.

The screenshot shows the 'Your details' section of a donation form for 'HOPE for WILDLIFE'. The form is titled 'Your details' with a back arrow and 'FR' in the top right. A progress bar at the top shows four steps, with the third step (address) being the current one. The form includes a 'City' dropdown set to 'Toronto', a 'Country' dropdown set to 'Canada', a 'Province' dropdown set to 'Ontario', and a 'Postal code' field set to 'M6J 0C7'. A 'Continue' button is at the bottom. The form also features a 'HOPE for WILDLIFE' logo, a mission statement, a note about tax receipts, and a photo of a raccoon.

HOPE for WILDLIFE Connecting people to wildlife in a positive way through knowledge and understanding. Hope for Wildlife believes that education through rehabilitation is the key to a sustainable future.

(PLEASE NOTE: A tax receipt will be issued immediately to the email address you supply; please check your Junk/Spam folder if you do not receive it in your Inbox.)

Since 1997, Hope for Wildlife has rescued, rehabilitated, and released over 80,000 injured and orphaned wild animals representing over 250 species.

In addition to the ongoing... [Read more](#)

City* Toronto Country* Canada Province* Ontario Postal code* M6J 0C7

[Continue](#)

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Ways to Help Boost Donation Conversion



Enable 'cover the fees' by default.

~70% of donors cover the fees when it's enabled by default.

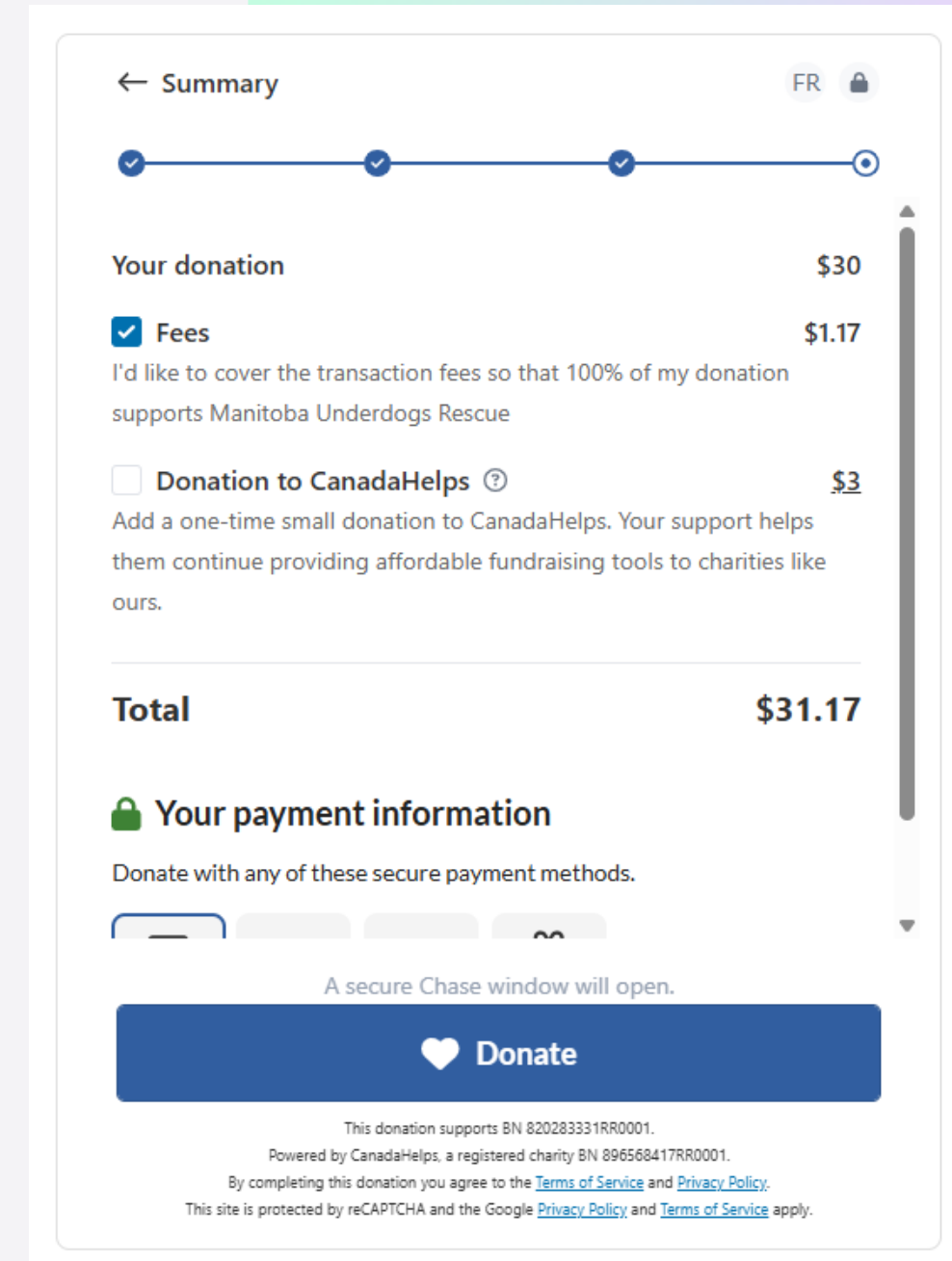


Turn on custom donation presets. This will help you communicate tangible impact of different gift values.



Enable the "monthly prompt". When the monthly prompt is enabled, 3 of 4 gifts are monthly donations. Approximately 75% of gifts are monthly gifts when prompt is enabled.

**Only available on multi-step.*



← Summary FR

✓ — ✓ — ✓ — ○

Your donation \$30

☒ **Fees** \$1.17

I'd like to cover the transaction fees so that 100% of my donation supports Manitoba Underdogs Rescue

☐ **Donation to CanadaHelps** \$3

Add a one-time small donation to CanadaHelps. Your support helps them continue providing affordable fundraising tools to charities like ours.

Total \$31.17

Your payment information

Donate with any of these secure payment methods.

A secure Chase window will open.

Donate

This donation supports BN 820283331RR0001.
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Discussion / Q&A

- First, we have pre-submitted questions
- Let's dig into some of the questions from that came in from chat...



Connecting people to wildlife in a positive way through knowledge and understanding. Hope for Wildlife believes that education through rehabilitation is the key to a sustainable future.

(PLEASE NOTE: A tax receipt will be issued immediately to the email address you supply; please check your Junk/Spam folder if you do not receive it in your Inbox.)

Since 1997, Hope for Wildlife has rescued, rehabilitated, and released over 80,000 injured and orphaned wild animals representing over 250 species.

In addition to the ongoing...
[Read more](#)



← Your details FR

Address

Address line 1*

#526E 26 Lisgar Street

Address line 2 (optional)

Address line 2 (optional)

City*

Toronto

Country*

Canada

Province*

Ontario

Postal code*

M6J 0C7

Continue

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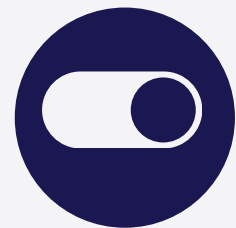
Final takeaways, remember...



No tech activation is required. The design changes will activate automatically.



Donation processing will not change. There will be no disruption in fundraising related to these updates.



Optimize your form features. Enable cover the fees, donation presets and the monthly prompt multi-step.



We will email you this recording! Expect an email from CanadaHelps with the webinar and slide deck linked.

< Back to donation form

Will you consider becoming a monthly supporter?
Convert your gift into a monthly donation to help us better focus on our mission year-round!

♥ Donate \$15/mo

Donate \$10/month

Keep my one-time \$40 gift

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Book a Time with CanadaHelps' Team
to discuss your fundraising



charitylife@canadahelps.org