



January Roadmap Checklist

- ☐ **Thank all giving season donors**
- ☐ **Know how and where to resend donation receipts**
- ☐ **Celebrate your team's efforts and results 🎉**

Resources

- CanadaHelps Help Center: [Accessing Your Tax Receipts Through CanadaHelps for Donors](#)
- [Giving Season Report](#): Access your final data and donor segments

January Roadmap Action Plan

☐ THANK ALL GIVING SEASON DONORS

Donors just gave generously, and how you thank them now will determine whether they give again. This is donor retention 101.

- **Send final thank-you emails** to all donors who gave during the giving season (if not already done).
- **Send personalized, hand-written thank-you messages** to major donors, board members, new monthly donors, and anyone who went above and beyond, if possible. It's a small gesture that creates a lasting impact.
- **Create a short video message from leadership** thanking the community, referencing the campaign and the impact donors made. Share via email and social media.
- **Post a thank-you message on your website and social media**, celebrating your donors.
- **Share your impact & numbers:** Donors want to know that their gifts are making a difference. Create an impact report showing campaign results and how funds will be used, and share results on social media, in a newsletter, and via email to your donor base



☐ **KNOW HOW AND WHERE TO RESEND DONATION RECEIPTS**

Some donors will need duplicate or replacement tax receipts. Be prepared.

- **Leverage CanadaHelps receipts:** CanadaHelps automatically provides CRA-compliant tax receipts. Donors who have given via your Charity Profile or Custom Donation Form should have received them immediately after giving.
- **If you need to reissue a tax receipt:**
 - Ask donors to log in to their CanadaHelps account and download their tax receipt from the [Donations History and Receipts](#) tab.
 - If they don't have a CanadaHelps account, share [this help article](#) for a step-by-step guide on downloading their tax receipt.
- **Document the process:** Note which donors requested re-sends and why. This can help you identify issues for future campaigns.



☐ CELEBRATE YOUR TEAM'S EFFORTS AND RESULTS 🎉

Your team worked hard. Celebrate with them.

- Bring together staff, volunteers, and board members to celebrate the campaign and reflect on what worked. Share final numbers, acknowledge outstanding contributions, and celebrate wins, no matter how small.
- Post campaign results on your internal communication channels (Slack, email, bulletin board) so everyone sees the impact of their work.
- On social media, thank your staff and volunteers by name (if appropriate). Show donors the faces behind your organization.



Audit your giving season performance:

- Use data to understand what worked and improve for next year. Key metrics to calculate include:
 - **Total revenue:** Final total raised. Compare to goal and last year.
 - **Donor count:** Total, new, returning, etc.
 - **Average gift size:** Compare by segment (major donors vs. first-time, GivingTuesday vs. year-end, etc.)
 - **Retention rate:** What percentage of last year's donors gave again?
 - **Revenue by channel:** Email or social media-driven, direct website, Charity Profile, securities, etc.
 - **Peak giving days:** When most donations came in.
- Document what worked and what didn't so that your team can access it in August 2027.
- Tag donors for future segmentation. If your organization uses CanadaHelps Ensemble, you have tagging capabilities. Tags allow you to segment donors for future campaigns and personalized outreach.

KEY TAKEAWAYS FOR SUCCESS

- **Start early:** Giving season prep begins in August, not November. This longer runway gives your team time to plan, create, and optimize.
- **Use data:** Leverage CanadaHelps Giving Season Report and your metrics to make informed decisions about channel prioritization, donor segmentation, and campaign timing.
- **Segment strategically:** Not all donors are the same. Tailor your messaging and channel strategy to major donors, recurring donors, lapsed donors, and first-time prospects.
- **Emphasize different giving options:** Promote one-time giving, monthly recurring, and securities donations. The split between channels matters as you focus on growth opportunities.
- **Authentic storytelling:** Use real volunteers, staff, and beneficiaries as the faces of your organization. Persona-driven content builds trust and connection.
- **Plan for peak giving days:** Track when donors give and adjust your messaging and frequency accordingly.
- **Thank donors thoroughly:** Thank-you messages are your easiest win for donor retention. Send them quickly, personalize them, and keep thanking throughout January.
- **Analyze and iterate:** Use January to audit your campaign, document lessons learned, and plan improvements for 2027.



Best of luck with your 2026 giving season!