



September Roadmap Checklist

- ☐ **Complete your CanadaHelps Charity Profile**
- ☐ **Plan your communication calendar**
- ☐ **Set campaign milestones and identify key metrics to track**

Resources

- Template: [Social Media Calendar](#)
- Template: [Social media posts](#)
- [Giving Season Report](#): Use the CanadaHelps Reports tab to access donor data and segment accordingly
- Blog: [The Benefits of Creating a CanadaHelps Charity Profile and Impact Page](#)

September Roadmap Action Plan

☐ COMPLETE YOUR CANADAHHELPS CHARITY PROFILE

A complete Charity Profile helps donors find your organization and build trust with donors once they land on it. Plus, when a donor gives through a Charity Profile, they'll automatically receive a tax receipt for their donation!



Basic Profile Completion

- In the **[“Profile”](#)** tab, complete your “About Text” section with your mission, who you serve, and why your work matters. Many donors decide to keep reading or leave your Charity Profile based on this section alone.
- In the **[“Page Visuals”](#)** tab, add at least one high-quality image. An empty visuals section is one of the fastest signals to a donor that a Profile hasn’t been kept up.

Enhanced Profile Completion

- In the **[“Donation Presets”](#)** tab, add preset giving amounts that name what each amount funds. A gift labelled “one week of groceries” performs differently from an unlabelled \$25 option.
- In the **[“Impact Page”](#)**, complete the “Overview” and “Results” sections with specifics on strategy, outcomes, and impact. Donors comparing charities that support similar causes often use this page to decide between them.

Advanced Profile Completion

- In the **[“Programs”](#)** tab of your Impact Page, list and explain the types of programs you run. A donor deciding between giving a one-time and a monthly gift may want to see how their ongoing support continues past a single campaign.
- In the **[“Testimonials”](#)** tab, add quotes and notes from supporters. A testimonial carries a different kind of weight than your own mission statement and impact reports.
- In the **[“Supporting”](#)** tab, share context for the revenue and expense figures so donors understand the story behind your numbers.

□ PLAN YOUR COMMUNICATION CALENDAR

A well-planned calendar keeps your team organized and ensures consistent donor engagement throughout the giving season.

- **Map out key dates:** This includes GivingTuesday (December 1, 2026), December 24, December 31, and the tax deadline. Add any organizational milestones or events.
- **Work backwards:** Plan when you'll need to send pre-launch awareness emails, campaign kickoffs, mid-campaign updates, and final appeals. Consider that many donors give in the last 3 days – plan accordingly.
- **Identify content themes:** Each week should have a focus, but leave room for real-time adjustments based on campaign performance or unexpected opportunities. For example:

2026

November

Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
Campaign launch and goal announcement						
08	09	10	11	12	13	14
Impact stories and testimonials						
15	16	17	18	19	20	21
GivingTuesday reminders						
22	23	24	25	26	27	28
GivingTuesday matching challenges and urgency						
29	30					
GivingTuesday blitz						

December

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		01	02	03	04	05
		Giving Tuesday blitz		Donor Thank-Yous		
06	07	08	09	10	11	12
Progress updates and donor spotlights						
13	14	15	16	17	18	19
Targeted appeals by donor segment						
20	21	22	23	24	25	26
EOY giving reminders						
27	28	29	30	31		
Countdown and final push						

- **Build in flexibility:** Leave room for real-time adjustments based on campaign performance or unexpected opportunities.
- **Coordinate across channels:** Ensure your Charity Profile, website, email, and social media messaging are aligned and reinforcing each other. If you're running a matching gift challenge, promote it everywhere.
- **Plan your metrics tracking:** Schedule when you'll check campaign progress and adjust tactics. Fortnightly is ideal.

□ SET CAMPAIGN MILESTONES AND IDENTIFY KEY METRICS TO TRACK

Clear milestones and tracked metrics keep your campaign focused and help you adjust tactics in real time. You can set up a progress thermometer on your charity account to help further track your goal.



How to set milestones:

- **Overall goal:** Example: Raise \$100,000 by Dec 31, 2026
- **Break it down:** Example:
 - Overall Giving Season Goal: \$100,000
 - GivingTuesday target: \$25,000 (25% of overall goal)
 - December 15 target: \$70,000 (70% of overall goal)
 - December 31 target: \$100,000 (100% of overall goal)
- **Secondary milestones:** Beyond revenue, track donor and revenue growth.
Example:
 - Donor acquisition: Gain 50 new donors
 - Monthly donors: Recruit 20 new monthly donors
 - Channel growth: Increase securities giving by 20%, monthly recurring by 15%
 - Retention: Retain 75%+ of last year's donors

Key metrics to track throughout the giving season:

- **Total revenue:** Compare against goal and last year's performance.
- **Revenue by channel:** What percentage came from email, social media, direct website, securities, etc.
- **Average gift size:** Track this by channel and donor segment. Are major donors giving larger amounts this year?
- **Donor count:** How many unique donors? What's the year-over-year growth?
- **New monthly donors:** How many people signed up for recurring giving?
- **Donor retention:** What percentage of last year's donors gave again?
- **Charity Profile impact:** Track how many donations came from your Charity Profile vs. other channels.
- **Peak giving periods:** When did most donations come in? Confirm whether GivingTuesday or December 31 is your peak.

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!