



October Roadmap Checklist

- ☐ **Schedule Giving Season campaigns in your Charity Profile**
- ☐ **Create emails and social posts, segment donors, and begin early outreach**
- ☐ **Generate QR codes for forms and events to use in print materials**

Resources

- [Giving Season email templates](#)
- [Giving Season social media post templates](#)
- [Giving Season social media calendar template](#)

October Roadmap Action Plan

☐ SCHEDULE GIVING SEASON CAMPAIGNS IN YOUR CHARITY PROFILE

Charities typically set up at least two Giving Season campaigns: one is for GivingTuesday, and one general Giving Season campaign. Setting both up now, before the season gets busy, means less to manage later. CanadaHelps makes it easy. Here's how:

	To create a GivingTuesday 2026 Campaign	To create a Giving Season 2026 Campaign
Step 1	In your CanadaHelps charity account, go to the "Campaigns" tab in the Charity Profile, create a new campaign and enter the following information:	
Language	Select the language your campaign is in, whether it's English, French, or both.	
Name	GivingTuesday 2026	Giving Season 2026
Start Date	Dec 1, 2026	Nov 1, 2026
End Date	Dec 1, 2026	Dec 31, 2026
Goal Amount	Entering a goal amount enables a fundraising thermometer that tracks progress toward your goal. Donors are more likely to give when they can see the campaign gaining momentum.	
Fund	Choose from an existing fund or create a new one.	
Step 2	Once you create the campaign, you'll be taken to the Edit Campaign page. In the Campaign Info tab, enter the following information:	
About Text	GivingTuesday is a global day of giving. Be specific about what a gift supports, and consider tying your language to this broader movement.	With the Giving Season campaign running for two months, this is your chance to tell a deeper story about what you're fundraising for.
Campaign Card	Enable this to feature your campaign on the Charitable Gift Guide .	
Card Description	Add a short description to show what a single gift accomplishes. For example, <i>"\$50 provides a week of groceries for a family in need."</i>	Since this campaign runs longer, add a short description that outlines what different levels of giving accomplish rather than anchoring it to one suggested giving amount.
Campaign Type	By default, the Charitable Gift Guide filters campaigns into the gift ranges listed below. To maximize visibility, select the range that best matches your typical gift. This tells donors your campaign is built around a specific level of giving, with a clear outcome tied to it. Select either: → Gifts: \$25 or less → Gifts: \$26 to \$100 → Gifts: \$101 to \$250	
Step 3	All that's left are the Media Library, Page Visuals, and Donation Preset tabs. These are optional, but donors browsing the Charitable Gift Guide respond to campaigns with images and clear preset amounts.	
Media Library	Upload the pictures and videos you'll use throughout the campaign.	
Page Visuals	Select the main image from your uploads to the Media Library; it's your chance to make a great first impression!	
Donation Presets	Attach a specific outcome to different levels of giving. This is especially useful if you've selected a campaign type noted above. For example, if you chose "Gifts: \$26 to \$100" you might set presets at \$30, \$50, \$75, and \$100, each tied to its own outcome.	
Step 4	Click "Save and View" to view your campaign on your Charity Profile, and be sure to share your campaign URL on all your channels!	

□ CREATE EMAILS AND SOCIAL POSTS, SEGMENT DONORS, AND BEGIN EARLY OUTREACH

Have content templates and communications plans ready to deploy across channels and audiences as the peak giving periods draw closer.

Example types of email templates to create:

- **Pre-launch awareness (late October):** *"Big things are coming – here's what we're planning".*
- **Campaign kickoff:** *"Our campaign is live! Here's our goal and why it matters".*
- **GivingTuesday push:** *"Tomorrow is GivingTuesday – double your impact with our matching gift challenge".*
- **Mid-campaign update:** *"We're 60% of the way there – thank you, and can you help us finish strong?"*
- **Final week appeal:** *"One week left to make a difference in 2026".*
- **Last-Day urgency:** *"Tonight at midnight, your chance to give ends. Don't miss it".*



Example social media content to prepare:

- **Impact stories:** Share real examples of how donations make a difference. Include specific outcomes and establish an emotional connection.
- **Donor spotlights:** Feature donors who explain why they give (with permission). Ask them to record a short video or write a testimonial.
- **Behind-the-scenes content:** Show your team at work, volunteers in action, or a day in the life at your organization. If Instagram or TikTok feels right for your audience, this is the kind of authentic, behind-the-scenes content that performs well there.
- **Countdown posts:** *"7 days until GivingTuesday!"* or *"48 hours left to donate in 2026".*
- **Thank donors publicly** and celebrate milestones.

Visual design assets:

Create branded graphics for GivingTuesday and year-end giving that you can adapt for different platforms and messages. Use consistent colours, fonts, and imagery, so donors recognize your campaign instantly.

[You can find some social media post templates here.](#)

Example campaign types to highlight:

- **Segment donors, using the data you have.** This could include segments based on gift size, previous giving motivations, monthly vs one-time donors, etc.
- If you have fundraised through CanadaHelps during Giving Seasons from previous years, you can also pull [Giving Season Reports from your CanadaHelps charity account](#) to identify segments and which 'types' of campaigns resonate with your audience.
 - **Christmas/holiday giving:** Use messaging like *"Give the gift of hope"* or *"Help families have a warm holiday."*
 - **Tax-planning appeals:** Appeal to donors thinking about their year-end tax situation. *"Your year-end gift supports [cause] and provides a tax receipt."*
 - **Matching gift challenges:** Appeal with incentives to leverage and maximize impact. *"Your gift will be doubled!"*
 - **Legacy/impact-driven:** Appeal to donors who want to see tangible change. *"Your gift will provide X meals, Y services, Z lives changed."*

Launch early outreach

Getting a head start with your most loyal supporters builds early momentum and sets the tone for the season.

- **You can reach out to:**
 - **Major donors:** Send personalized emails or make phone calls to your top 20-30 donors.
 - **Recurring donors:** Thank them for their ongoing commitment and invite them to make a special one-time gift.
 - **Board members and volunteers:** Ask them to give first and then share your campaign with their networks.
 - **Lapsed donors:** Re-engage donors who gave in the past but haven't recently.
- **Some early outreach tactics include:**
 - Sending personalized emails that reference past giving or involvement
 - Sharing campaign teasers on social media to build anticipation
 - Hosting a small event or webinar to share your vision for the campaign and build community

□ GENERATE QR CODES FOR PRINT MATERIALS

QR codes bridge the gap between offline and online giving, making it easy for donors to give from events, direct mail, or in-person encounters.

- **Generate QR codes:** If you are using a [CanadaHelps Custom Donation Form](#), we provide a ready-to-use QR code with every form. If not, use a free QR code generator to generate a link that links directly to your Charity Profile or a donation page.
- **Create unique codes:** Generate different QR codes for different direct-mail touchpoints so you can track where donations are coming from. For example, one for direct mail and another for event signage.
- **Design for visibility:** Make sure QR codes are large enough to scan (at least 1 inch x 1 inch). Ensure they have good contrast against the background.
- **Provide clear instructions:** Not everyone scans QR codes regularly, so include simple instructions: *"Scan with your phone's camera to donate now"* or *"Point your phone camera here to give."*
- **Test thoroughly:** Scan the QR codes on multiple devices to ensure they work perfectly and link to the correct page. Test on both Android and iOS.



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!