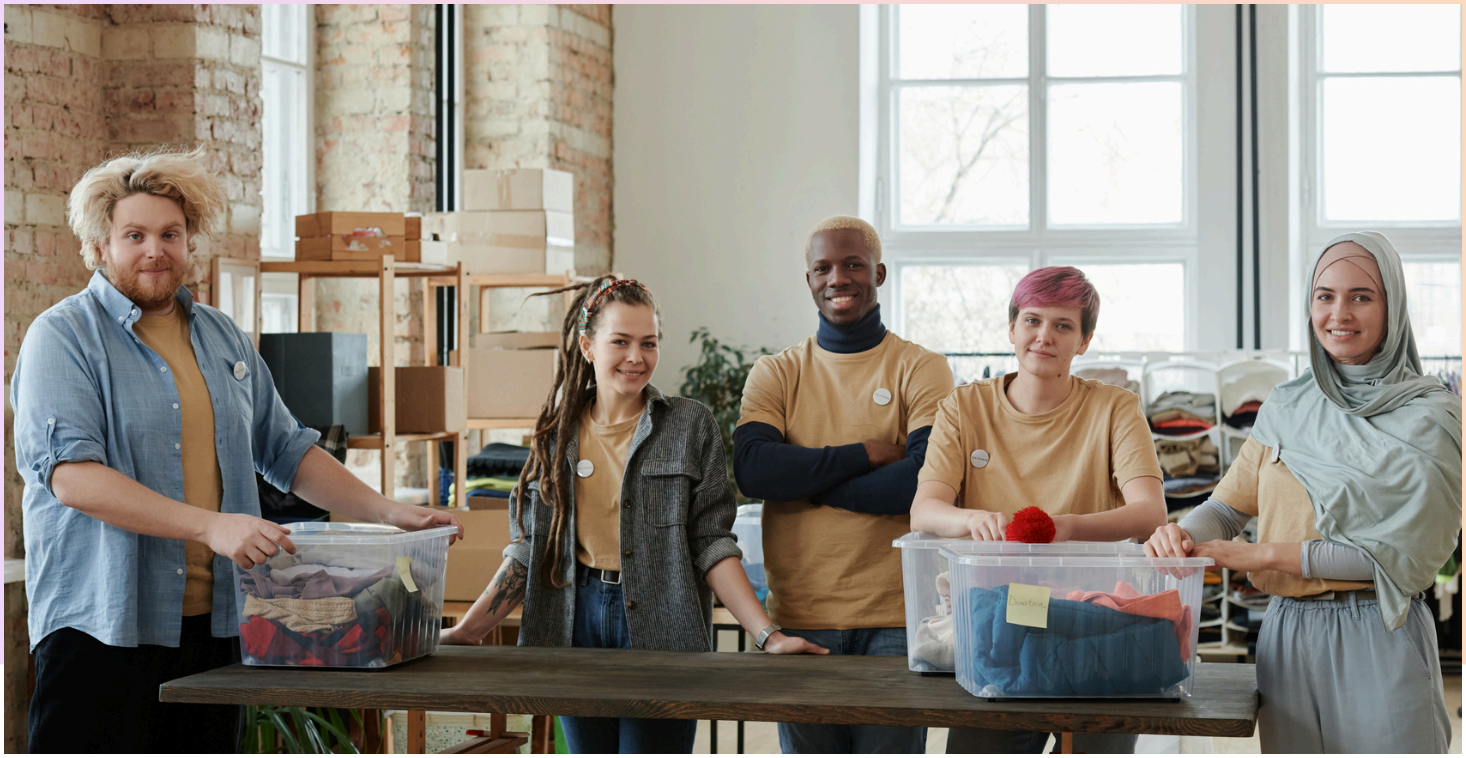


August Roadmap Checklist

- [ ] **Audit your CanadaHelps Charity Profile**

- [ ] **Review donor channels and explore new giving options**

- [ ] **Audit your infrastructure: email, social, approvals, data, resources**

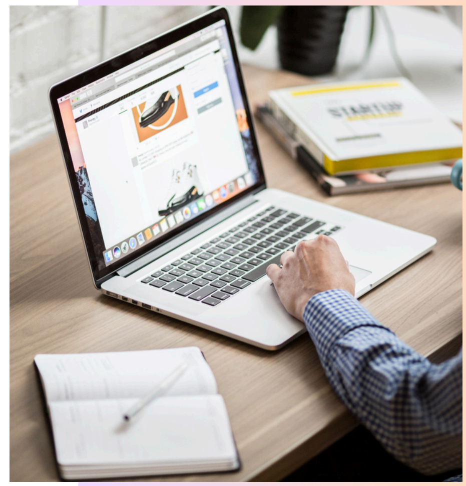
Resources

- Securities guide: Increase your fundraising with securities donations
- 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

August Roadmap Action Plan

☐ AUDIT YOUR CANADAHELPS CHARITY PROFILE

Your CanadaHelps Charity Profile is what any donors see before they decide to give. But outdated campaigns, old logos, and missing details quietly erode trust, especially as donor traffic increases heading into the Giving Season. A quick audit this month helps ensure your Profile is ready to earn donor trust when it matters most.



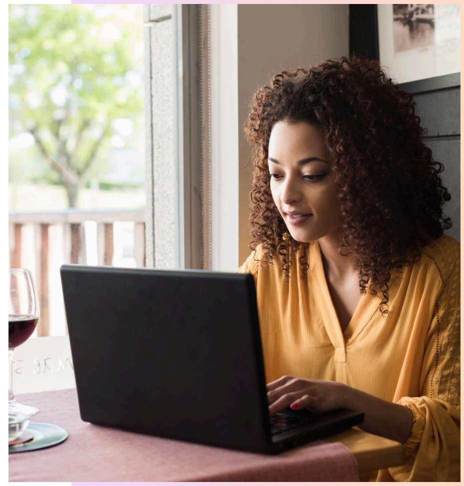
Your 4-Step Audit:

- **In the "Profile" tab,** scan for anything that's factually stale, such as an old logo, a contact name who's left the organization, or numbers that no longer reflect your current impact.
- **In the "Campaigns" tab,** clean up or delete anything that's no longer active, so your Charity Profile stays focused for supporters.
- **In the "Discovery Settings" tab,** confirm your search image, intro, and mission categories and scope are up to date. These fields can affect where and how often your Charity Profile shows up in search results.
- **Match your Charity Profile URL** across your social media, website, and other channels. A broken or misspelled link is a quiet way to lose a donor before they even land on your pages.

Donors typically check the first three items above before trusting an unfamiliar Charity Profile.

REVIEW DONOR CHANNELS AND EXPLORE NEW GIVING OPTIONS

Understanding how your donors prefer to give helps you meet them where they are and expand your fundraising capacity.



- **Analyze past data:**
  - Look at what types of donations came last giving season - one-time, monthly, securities, etc. - and which have the highest retention rates.
  - Find out where donations came from - what percentage came through email, social media, in-person events or direct website visits?

- **Explore securities giving:** If you haven't already, explore securities donations (stocks, mutual funds) with CanadaHelps. These can significantly boost revenue and appeal to donors with capital gains concerns.
- **Survey your donors:** Identify which channels your donors prefer and want to continue using to give and receive updates. Their preferences should further help shape your channel strategy.
- **Set baseline metrics:** Document your current split between channels so you can measure growth this giving season. For example: 60% one-time gifts, 30% monthly recurring, 10% securities.

☐ AUDIT YOUR INFRASTRUCTURE: EMAIL, SOCIAL, APPROVALS, DATA, RESOURCES

Before diving into campaign planning, ensure your operational foundation is solid.

- **Email capability:** Can you send bulk emails, and do you have an email service provider? Test your delivery to ensure emails aren't landing in spam folders.
- **Social media presence:** Do you have at least one active social media platform, and which ones have your audience engaged with most?
- **Board approval:** Have you secured board approval for your giving season goals, budget, and messaging direction?
- **Team resources:** Who will own which parts of the campaign, and do they have the bandwidth? Document responsibilities to avoid last-minute scrambles.
- **Giving process:** Is your donation process working smoothly, and are your website and donation forms mobile-friendly? Test end-to-end.
- **Data audit:** Pull last year's giving season data that will help you segment donors and plan communications over the next few months. This includes:
  - Donor segments (major, recurring, lapsed, first-time)
  - Peak giving days
  - Total revenue and average gift size
  - Number of donors and retention rate

If you have previously used Custom Donation Forms, you can also pull [Giving Season Reports from your CanadaHelps charity account] to identify segments.

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!