



## Online Fundraising Cheat Sheet & Checklists

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### The Must-Knows and the Must-Dos

Successful online fundraising requires three core elements: (1) a **good website** and an especially good **Donate Now page**, (2) an **email marketing program** to drive people to the Donate Now page and to keep them engaged in between appeals, and (3) a **social media presence** to engage supporters in conversation and empower them to spread the word for you.

#### 1. Your Website and Donate Now Page

##### Must-Know

- Essential to get this right, so start here.
- Donors want to understand what you do, why, and how – **very quickly and very clearly**.
- Donors want to know you share their **values**.
- They also want to know specifically **how** you will use their donations.
- They need to know they can **trust** you with their credit card numbers and their email addresses.
- They need to know you want them to donate online, and for the process to be **very easy and smooth**.

##### Must-Do

- If your mission statement is splashed across your homepage, **TAKE IT OFF!**
- After a **plain English** description, use **stories and photos** to answer the “what, why, and how” on your home page.
- Get a big ol’ Donate Now button. Make sure a “donate now” **link is prominent** on every page (in your template).
- Once you get to the Donate Page, **limit options** in both giving and navigation (especially for specific fundraising campaigns).
- Ask for only the information you need and **streamline** the process.
- Reassure** with privacy policy links and security logos.

## 2. Your Email Marketing Program

### Must-Know

- The most successful online fundraisers have the biggest and most **active email lists**.
- Think of your e-newsletter as a **gift** to your supporters. Is it one they will look forward to receiving from you?
- **Churn happens**. You must constantly build your list.
- Focus on **micro-content** and **calls to action** (not always Donate).
- Images and video are great to include, but **text rules** in email.

### Must-Do

- Use an **email newsletter service provider**.
- Make it super easy to **get on** your list and to **get off** of it.
- Use e-news to report back, share **success stories**, thank your supporters, and build emotional connections through personal stories.
- Use a clean, simple design and send in **MIME** (combo of HTML and text)
- Send regularly**. This is your primary means of donor stewardship with online giving.

## 3. Your Social Media Presence

### Must-Know

- Message control is a myth. **Let go of it**.
- It's a **conversation**, not a presentation.
- It's a **marathon**, not a sprint.
- Better to do a great job with **one or two elements** than to do a lousy or just OK job in multiple places.
- It's dirt cheap or free, but can be time-consuming. Set **realistic goals and time limits** if needed.
- Focus on ways to **empower your biggest fans** to spread the word for you.

### Must-Do

- Do something**, even if it's only 15 minutes a day. And stick with it.
- Always **listen**. Respond and start conversations of your own as you have time, but always listen.
- Default**: Facebook Page and commenting on other people's blogs.
- Always follow the 6 G's of social media marketing. Good social media marketing is **Genuine, Generous** and **Grateful**. Bad social media marketing is **Greedy, Grandstanding** and **Grabby**.

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## Your Nonprofit Website & Home Page

### THE ESSENTIALS CHECKLIST

#### **Can I guess the domain name?**

Purchase the .org, .com, and .net versions of your domain, along with any reasonable guesses for what your website address might be and redirect them all to your main URL.

#### **Do I know where I am?**

Your name or logo, and for local groups your location, should appear at the top of every page.

#### **Is there a clear path to answers or actions visitors are seeking?**

What are the top three answers or actions a website visitor is most likely looking for? Ensure answers and actions are only one click away, if not on the home page itself.

#### **Does the home page include images?**

The web is visual. Make sure you have at least one photo on your home page.

#### **Can I donate online easily from the home page?**

Make that Donate link or button stand out where we can see it at first glance.

#### **Are you capturing email addresses?**

Give visitors an easy, visible, and clear way to stay in touch now that they've found you online.

#### **Are people featured?**

People connect with people, not 501(c)(3)s. Let us see the people behind and around the nonprofit.

#### **Are there stories on the need or successes?**

Stories make abstract mission statements real. Give us examples of the need and your successes through stories.

#### **Is it easy to contact staff?**

Can we easily find who we need to reach and how to call or email that person directly?

#### **Are you using the best keywords for your cause?**

For search engines to direct people your way, you need to use the real vocabulary on your site that people are typing into Google and other search engines. Talk in plain English, using their words.

## Your Donate Now Page

### THE ESSENTIALS CHECKLIST

**Are navigation options limited?**

Don't divert focus elsewhere.

**Is the form itself streamlined?**

Offer options, but not too many. Don't ask for information you really don't need.

**Are you reinforcing the decision to give right on the page?**

Remind donors where the money is going and what difference they are making.

**Do visuals support the decision to give?**

In addition to the text, do visuals support the decision to give too?

**Does the page feel safe and secure?**

It needs to look and feel secure. Use security icons from your provider. Reinforce privacy policy.

**Do you offer human help?**

Include phone and email addresses on the page, as well as snail mail address.

## Your Email Newsletter

### THE ESSENTIALS CHECKLIST

#### **Are you using an email newsletter service provider?**

You shouldn't do bulk email from your personal email account. Use an email newsletter provider (EmailNow, iContact, and MailChimp are some popular, affordable providers).

#### **Is the From line recognizable?**

Readers are much more likely to open email from people they recognize. Use your nonprofit's name or acronym, with or without a staff person's name, in the From line.

#### **Is the Subject Line intriguing or otherwise compelling?**

Don't sabotage a perfectly good newsletter with a boring subject line like "Summer Newsletter."

#### **Is the content all about the readers' interests, wants and needs?**

Your newsletter should reflect your readers' interests, wants, and needs more than your staff's. Put yourself in their seats. Do they really have a compelling reason to read what you are writing?

#### **Is the tone personal and conversational?**

The best emails read as personal communications from one person to another. Don't speak as a nonprofit organization; speak as a staff person working on issues your readers care about.

#### **Does it include a call to action?**

I've read your newsletter. Now what? Always provide a next step, even if it is something as simple as "Learn more" with a link to a related website page. Mix your fundraising calls to action (Donate Now!) with softer calls to action, but focus on only one per edition for best results.

#### **Is it skimmable?**

People skim email more than they read it, especially newsletters. Can I read only the headlines and subheads and still understand the gist of the newsletter?

#### **Is the design simple?**

Complicated designs are hard to read and even harder to skim. Keep your layout simple. A plain one or two column format with black text on a white background works just fine. Ensure that the email design is consistent with the landing page (same graphics and messaging, not necessarily exact same layout).

#### **Does it keep the preview pane/mobile reader in mind?**

Many people will only see the first few sentences of your email. Make them count so the reader will make the effort to scroll for the rest. If you have multiple articles in your newsletter, put a table of contents at the top.

## Following Up with Your Online Donors

### THE ESSENTIALS CHECKLIST

#### **Immediate Thank You Page on the Site**

Conveys not only success of transaction, but THANKS for gift and expected impact.

#### **Immediate Thank You Email**

Transaction receipt, but also suggestions for next steps, reinforces accomplishments.

#### **Follow-Up Email**

Within a short time (days, maybe weeks, not months), more personal thank you with success stories, other feel-good info and explanation of upcoming communications (e.g. putting you on e-newsletter list, will be invited to upcoming events, etc.) .

#### **Ongoing Communications**

Can range from basic enewsletter to highly segmented depending on donor interests.

#### **Ask Again!**

After you have adequately thanked the donor and reported on successes, don't forget to ask for another gift!