

Online Fundraiser's Checklist 2.0:

Covering the Basics to
Ensure Success Across
*Online Fundraising,
Email Outreach and
Event Management*

A free eBook
from your friends at
[Network for Good](#)

Network  **for Nonprofits
for Good.**

This eBook was written by your friends at Network for Good



About Network for Good

The Home of Easy & Affordable Online Fundraising

At Network for Good, we don't just give you a DonateNow button—we help you make sure people click on it. And we don't just give you EmailNow—we help you run great email campaigns. We help you become an online fundraising and marketing superhero without superhuman effort or a big budget.

Here are a few of the ways how we can help nonprofits succeed online:

- 1 Easy, affordable fundraising solutions: Get donations on your website with [DonateNow](#)
- 2 Email campaign and newsletter tools: [EmailNow](#) powered by Emma for sending and tracking mass emails and telling you which messages work best
- 3 Online event management: [EventsNow](#) powered by givezooks! for accepting donations, registrations and ticket purchases online
- 4 Free weekly fundraising and marketing tips: [Sign up here](#) for great advice delivered to your inbox each week
- 5 [Fundraising123.org](#): Our free online learning center is filled with ideas and best practices on what it takes to be an online fundraising superhero.

We're biased, but we think there are many good reasons to work with us:

- Kinship.** We understand you because we're a nonprofit too
- Value.** We handle the tough parts of online fundraising for you
- ROI.** Our customers raise \$25 for every dollar they spend
- Support.** We provide lots of training and support via [TheNetworkforGood.org](#), phone, email and chat

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SPECIAL OFFER FOR READERS OF THIS GUIDE!

**\$50 off
set-up**

for DonateNow for
online donation processing

—OR—

**\$100 off
set-up**

when you subscribe to both
DonateNow and EmailNow together

Visit www.networkforgood.org/apply and use one of the discount codes below to get started, or call 888.284.7978 x1 to speak with one of our fundraising specialists who can provide more information.

- When you **subscribe to DonateNow** for online donation processing with the discount code **CHECKLIST50** before May 31, 2011, you'll get 25% off your set-up fees — an instant \$50 savings!
- When you **subscribe to both DonateNow AND EmailNow** for your email outreach with the discount code **CHECKLIST100** before May 31, 2011, you'll save 50% off your DonateNow set-up fees—an instant \$100 savings!

INTRODUCTION: Why Checklists Rock

A year ago we released the original “Online Fundraiser’s Checklist” to our nonprofit audience in order for all our readers and trainees to have bite-sized, easy-to-use, practical tips to be successful using the Web.

Now we’re even more excited to share this 2.0 version, which covers not only online fundraising basics (like Web design and donation form etiquette) and email outreach to-dos (subject line tips, anyone?), but also includes the third leg of your online fundraising stool: event management.

Even though social media and social networks are shiny and enticing to try, these three areas of **fundraising**, **email** and **events** are the bread and butter of any successful nonprofit campaign to do good (and do it well) online.

We’ve got 10 checklists that cover the essential basics of online fundraising: your website home page, donation form, writing style, email lists, email campaigns, thank-you programs, and creating and marketing your next event.

Check the boxes on these worksheets, and if you don’t score well, use the helpful (and free!) resources listed on the bottom of the page to improve your online fundraising practices. You can always find great free resources at www.fundraising123.org.

(And, if you need the online tools themselves, we’ve got you covered there, too! Find more information at www.networkforgood.org/for-nonprofits.)

Here’s to big success in the months ahead!



CHECKLIST ONE: Website Home Page

Let's face it: People have short attention spans. Especially when it comes to the Internet. Your nonprofit home page needs to share just the right amount of information effectively and quickly.

- Can a stranger identify what your organization does and why they should care within two seconds of opening your home page?
- Do you have a big, emotionally affecting image or statement on the home page that connects on a personal level?
- Can you find your donate button in 1-2 seconds?
- Is your donation button framed in a compelling way? What personally relevant, tangible change will result if someone gives now?
- Is your donate button above the fold, big and colorful?
- Is it clear where the money goes? To directly which activities or people?
- Is there a sense of immediacy around your donate button? A reason to give right now?
- Do you have links to events and other opportunities for engagement?
- Do you have a clear third-party endorsement on the pages? (For example: ratings from GuideStar and Charity Navigator, or a testimonial from someone else regarding your nonprofit's services)
- Does your website give you and your potential donor the opportunity to take the first step in forming a relationship with you if they aren't ready to give now?
- Do you list where else donors can find you online, like Twitter and Facebook?
- Are you sure you don't have too much? Is the page clean, simple and easy to use?

Additional Resource

- [Speed Consulting: Nonprofit Websites Webinar](#)

CHECKLIST TWO: Donation Form and Tools

Look over your donation form and make sure it's the best it can be! Do you have all of the following?

- An easy way to get to the form: a BIG donate button that is colorful
- One clear call to action on your form (donate!)
- Compelling yet brief copy on the donation form that emphasizes your mission is critical
- Copy in a font that is easy for people over the age of 50 to read
- A look consistent with your brand
- Short donation forms—the more fields to fill out, the higher the abandon rate
- One-page donation forms (not multiple pages!)
- The ability to make the donation in someone's name
- Limited navigation—avoids giving users lots of ways to easily detour from the page before completing the action
- Automatic email tax receipts once the gift is made via the donation form
- Opt-in for hearing from you again or an email sign-up form
- The ability to configure your form—so you can test different versions
- The ability to place web analytics on your form so you know what people do when they're there
- The ability to set and test different donation amounts
- The ability to offer thank-you gifts
- Options to accept recurring gifts

Additional Resource

- [Sign up for a small group webinar](#) on how to upgrade your page with Network for Good

CHECKLIST THREE: Online Outreach Writing

Before you send or post anything, ask yourself the following questions:

The Basics

- Is it clear who the audience for your text is?
- Is all of your online outreach consistent in terms of tone and style?

Quality Control

- Have you checked spelling and grammar?
- Is your text readable? (Hint: White text on a color background and small font size are not easy on the eyes.)
- Have you checked for wordiness? (i.e. have you whittled down as much as possible?)
- Did you print out your text and read it aloud? *All* of it?
- When you want to make edits, do you keep changes in one tracked-changes document for easy updating?

Headings

- Do you limit your use of italics to captions or phrases?

- For longer pieces of writing, do you use sub-headings?
- Are all (or most) of your headings links?

Readability

- Are big blocks of text broken into bulleted lists?
- Is the text written in the “inverted-pyramid” style?
- Are all paragraphs limited to one idea per paragraph?

Design

- Does your writing incorporate graphics?
- Do you use sans serif fonts? (ex: Arial, Verdana versus Times New Roman and Georgia)
- Is all of your text at least 10-point font?
- Is there negative (white) space?

Additional Resources

- [9 Tips to Improve Your Small-places Writing Webinar](#)
- [Big Impact in Small Places eBook](#)

CHECKLIST FOUR: Building an Email List

How are you growing your email list?

Website

- Is the sign-up form “above the fold”?
- Can people sign up on any page on your website?
- Is there an immediate offering of what they’ll get in return?
- Does your sign-up form and the text around it make a promise about what to expect (frequency, privacy, etc.)?
- Have you thought about whether you should use a single- or double-opt-in policy?

Email Marketing

- Are “Forward to a Friend” and social sharing links in every message?
- Have you reviewed your content to make it worth sharing?
- Is there a link to the sign-up form in your personal email signature?

Social Networking

- Does your organization’s social networking presence encourage “friends” and “followers” to visit your home page and/or sign-up form?
- Do your promotional mentions show exclusivity? (i.e. If I Tweet about joining our newsletter list, have I clearly shown why that’s special?)

Search Engine Marketing

- Have you tried sending click-throughs to a sign-up form (rather than your home page or an event page)?
- Have you signed up for keywords related to your topic and the content your organization can provide via email?

Offline Capture

- Have all people who answer the phone been instructed to ask for email addresses?
- Do you promote e-newsletters and online content in your print newsletters?
- Do you promote e-newsletters and online content in your direct mail?
- Have you begun to request opt-ins at all events?
- Will you mention our online communications in the next media mention you have?

Additional Resources

- [**It’s All about the List! How to Grow and Cultivate Your Most Valuable Online Asset**](#)
- [**Growing Your List Audience with EmailNow**](#)

CHECKLIST FIVE: Email Marketing

Getting ready to hit send on your latest email marketing masterpiece?

Here are 9 points to review before you do:

- Does your subject line entice readers to open? They're the most important 8-10 words in your campaign. Make sure yours is a clear, concise introduction that entices your readers to take a look inside.
- Are you making the most of the preview pane? At first glance, many of your recipients will see just the first few inches of your campaign, so make your point – and your brand – stand out there.
- Is your email easy on the eyes? With simple, intentional font and style choices, you'll help grab and keep your readers' attention.
- Does the message come through, even if the images don't? Since many email clients don't automatically display images, balance yours with text that will help you make your point in any display possibility.
- Does this email have a personal touch? Whether it's with a personalized greeting, warm tone or specialized content, make sure your email feels like a conversation with people who know you, not a "blast" to a list.
- Are you being CAN-SPAM compliant? It's important to manage your online reputation by following best practices (and, you know, the law). Follow the basics by including your physical address at the bottom of your campaign and from which you'll respond. (Those "donotreply@soandso.org" addresses are a no-no!)
- Do you have permission to email everyone on your contact list? Permission-based email outreach is the way to stay in your supporters' good graces. Having "permission" means someone on your list is a member or subscriber of your organization, has signed up or otherwise asked to receive your emails or has participated (perhaps donated or attended a special event) in your organization within the past 18 months.

- Are you incorporating what you learned from your last email campaign? There's no such thing as a perfect email, but you can certainly work to improve open, click-through and response rates by paying attention to the results of your previous campaign(s).
- Have you tested any part of your email message? It might not be realistic to test your subject line (i.e. send out a couple of versions of your campaign prior to the larger send to see which performs better) or lead article every time you send a message, but even an informal poll around the office may give you perspective on what will be most effective.

Additional Resources

- [Bring Your e-Newsletter from Snoring to Soaring](#)
- [7 Steps to Better Email Fundraising & Communications](#)
- [Four Principles for Making Your Newsletter a Powerful Fundraising Tool](#)
- [The Nonprofit Email Marketing Guide eBook](#)

CHECKLIST SIX: Thanking Donors

- Do you send receipts and a personalized thank-you immediately upon receiving a donation?
- Do you thank donors again later in the year, reporting on the impact of their donation?
- Do you thank three times for every one time you ask for more money? Do you give the donors the credit for the impact? (Remember, it's about what the donor achieved, not just how great you are!)
- Do you personalize your thank-yous with at least the donor name and a signature of someone at your organization?
- When thanking donors, do you tie the gift back to the appeal – thanking the donor for the specific reason you asked for money?
- Do you experiment with occasional handwritten notes, phone calls, children's drawings, volunteer-written letters or other "wow" factor notes from time to time?
- Do you make it extremely clear to donors what you're doing with their investments?
- In your thank-yous, do you tell one specific story of how your donor's gift is making a difference?
- Do you let your volunteers, service recipients, other donors speak for you? Don't be the only one thanking your donors!

Additional Resources

- [Thanks a Million: How to Thank Your Donors So They'll Come Back and Give More](#)
- [The Number One Reason Donors Stop Giving](#)

CHECKLIST SEVEN: Planning an Event

- Set your grand plan:
 - Who is my audience?
 - What do I want them to do? Am I trying to educate people? Am I seeking actions supportive of my cause? Do I want to raise money?
 - Is an event the best way to get my audience to take the action I desire?
 - Is an event an ideal complement to my organization's other engagement efforts?
 - What's the key theme or message for the event that will prompt the audience to take the desired actions?
 - What should be the stated purpose of the event?
 - Where is the best place to stage the event given the audience and purpose?
- Have you determined the event's overarching goal?
- Have you set a budget?
- Have you chosen the right type of event? Choose the right type of event that best aligns with your audience,

your brand and mission, your goal, your budget, your available time, your expertise, your staff and/or volunteer availability and competencies.

- Did you set a time and place and get the logistical planning underway?
- Have you secured corporate sponsors?
- Is your event a dynamic, engaging experience from start to finish? Make it so by focusing on the experience of the invitees and putting together a full communications plan for them (not only including a great invitation but also cover a fun acknowledgement process and a dynamite series of interactions at the event).

Additional Resources

- [Six Steps to a Better Event](#)
- [What You Need to Remember When Planning an Event](#)
- [Maximizing Event Fundraising Success with Corporate Sponsors Webinar](#)

CHECKLIST EIGHT: Event Invitations

The key to a successful event? Attendees! Here are a few invitation tips to keep in mind:

- Does your invitation compellingly and emotionally remind people of why they should care about your organization? With online invites, you can convey this with photos and video very inexpensively!
- Does it make a clear case for why the event is worth the invitees' time?
- Is it clearly branded to your organization?
- Does it show what impact the event will have on something important?
- Is it personal?
- Is it clear? The critical elements of price, time, place, attire, etc. should be easy to find.
- Do the price tiers make sense for the audience? Is there an incentive to buy now (early bird specials, etc.)?
- Do you collect everything that's key to know from attendees (shirt size, food preference) without overwhelming them with questions?
- Have you made it incredibly easy to RSVP and buy a ticket or register?
- Is there a chance to add a donation to the transaction – or a way for people who can't attend the event to donate?
- Does it give invitees a way to spread the word if they want to let others know about the event? For example, this could be through social networks, links, badges and buttons.

Additional Resources

- [Handling the Challenge of Holding Events](#)
- [How to Revolutionize Your Special Events](#)

CHECKLIST NINE: Marketing an Event

To whom should you market your event? What channels will be most effective in spreading the word and increasing registrations? Make sure you have all of these basics covered:

- Outreach to local media (especially if you have something mediagenic to offer!)
- Calls to influential supporters
- Flyers or posters in key places
- Everywhere online—
 - o Your website
 - o Your email
 - o Your sponsors' websites
 - o Your e-newsletters
 - o Your social media outposts (Facebook, Twitter, YouTube, LinkedIn)
- Your corporate sponsors—work with them on ways to engage their employees
- Your biggest fans—ask your most loyal supporters to spread the word to their networks on your behalf

Additional Resources

- [How to Write a Human Interest Story](#)
- [Guerrilla Marketing for Nonprofits Webinar](#)
- [How to Increase Attendance & Fundraising Results for Your Next Event Webinar](#)

CHECKLIST TEN: Event Follow-up

- Have you used your reporting tools from your event management system and feedback from staff, sponsors and attendees to assess what worked – and what didn't? Record and share this information within your organization so you can follow up on any loose ends, smooth any ruffled feathers, celebrate any successes and define what to repeat or change next time.
 - Have you re-engaged with everyone who participated – from sponsors to volunteers to attendees to staff and donors? Share photos or results and give them the credit for the impact you had.
 - Have you called every attendee and started a dialogue? Using these 5 tips from Terry Axelrod of Benevon®:
 - o Thank them genuinely for attending.
 - o Ask them what they thought of the event—and be quiet and let them talk.
 - o Listen and identify their “hot buttons.”
 - o Ask if there's any way they could see themselves becoming involved with your organization in the future.
 - o Find out if there's anyone else they think might be interested in getting involved or attending a future event.
- (Notice that none of these steps involve asking for money— this part is about trying to develop a relationship with a person, not an ATM!)*
- Do you have a plan to reach out to the new people who became part of your prospect list? They came in as part of the event or the post-event calls. Share photos or results from the event and invite them to the next one (or to be on the list for the next one).
 - In a few months, report back to everyone the impact of the event on your key issue and goal. If a shelter was built or a life was saved, they need to know about it!
 - Have you worked with your corporate sponsors to develop ways to engage their employees?
 - Have you reached out to your biggest fans? Ask your most loyal supporters to spread the word to their networks on your behalf.

Additional Resource

- [**The Big Event eBook**](#)